

SPECIALIZATION VERSUS GENERALIZATION OF TOURIST PROMOTION IN EUROPE

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Abstract: This paper analyses the level of specialization of several international tourist information on/off line campaigns of different tourist organisations that promote and trade the tourism in the highest European tourist receiver countries. The methodology used in this research consists in a multivariable comparative analysis with a descriptive statistical nature, with a longitudinal sight of consecutive samples (2005–2011) from on/off line promotional documents of France, Germany, Spain and Italy.

Results of this scientific work confirm (1) a general promotional and trade offer and a specialization with limited features (2) that offer similar tourist features, as Culture, Urban and Nature Tourism (3) with clear predominance of traditional print campaigns against the electronic ones (4) and more differentiation index of online campaigns.

Keywords: tourism marketing, ict, e-tourism, tourism promotion, e-commerce.

Jel classification: L83, M30, M38.

1. Introduction

Nowadays the tourism sector is promoting new products aimed at very concrete segments of the market, as an answer not only to the high competitiveness of European economies, and that has a lot of importance in the process of creating differentiated tourism images, brands and identities (Kotler, Certner 2004; Kotler *et al.* 2007; Fürsich, Robins 2008), but also to the strategic actions to influence on the decisions to visit a place (Stergiou, Airey 2003; Teichmann, Zins 2008). It is also directing its strategies towards more specialized services and a more complete consumer's integration (Mittal, Baker 2002; Werthner, Ricci 2004).

The aim of current paper focus on analyzing the level of generalization and specialization of printed and electronic promotional documents during last six years from the national tourist offices from Spain, France, Italy and Germany. This is an important subject of international tourist information campaigns, in the main European countries which receive tourists, through the images and contents of their printed and electronic campaigns present in the websites. To analyse the coincidence and divergence factors among them (differences and similarities qualitatively and quantitatively significant), delimiting some of the promotion characteristics. The four chosen countries are included in the ten main world tourist powers in terms of quantity of travellers and expenditure of the traveller in destination as well, that traditionally establish the guidelines to be followed: their promotion campaigns act as models and obviously represent obliged reference points. These four countries do not only have more than 40% of incomes for international tourism in Europe, but also 40% of the number of international tourists who visit the old continent (UNWTO 2010). This allows that their promotion campaigns are necessary reference elements for the tourist market.

The methodology used in this research consists in a multivariable comparative analysis with a descriptive statistical nature, with a longitudinal sight of consecutive samples (2005-2011) from on/off line promotional documents. The research sample focuses on 944 printed and electronic promotional documents from the national tourist offices from Spain, France, Italy and Germany.

2. Methodology and approach to the investigation

As far as the used methodological model is concerned, it consists in a longitudinal sight of consecutive samples. This lets the observer to perceive changes in a specific population and also to establish some measurements throughout time. The exemplary has a panel-shaped design, due to the fact that the work is always focused on the same characters from which are taken periodical samples. With the aim of achieving the main targets, we are going to explain where the samples come from. The research sample focuses on 944 printed and electronic promotional documents from the national tourism offices from Spain, France, Italy and Germany. Our investigation is specifically focused on the international promotional documents from the national tourism offices of these countries. These promotional documents can be (or not) financed by the NTO themselves or by the different agents involved in the tourism sector concerning socioeconomics and politics.

The fieldwork has been developed throughout seven years, from 2005 to 2011, taking advantage of the annual celebration of the two main international fairs of tourism taking place in Spain: Feria Internacional de Turismo FITUR (International Tourism Fair in Spain, Madrid) and Saló Internacional del Turisme de Catalunya SITC (International Tourism in Catalonia Exhibition) in Barcelona. In parallel, the NTO official websites of these countries have been consulted, focusing the research on the presence E-promotional documents. The group of chosen countries

is included in the ten main world tourism powers in terms of quantity of travelers and expenditure of traveler in destination as well. Each one of these four chosen countries have a National Tourism Office (NTO), national organizations dedicated to the tourist promotion of the destinations of its whole national area into other countries. Spain, France and Italy are the Mediterranean European countries par excellence. Germany is also of the main receptive (and also outgoing) world tourism powers. Traditionally, the main world tourism powers lay down guidelines in many areas. Their promotional campaigns are always an example and reference to the other countries.

The investigation is clearly oriented to qualitative research, as this is the perfect way to carry out the present work, and one of the most complete tools used in market and consumer research. Due to this, the process of analysis, observation and reflection leads us to the description of the evolution of the subject of study. The same way, the investigation is focused on the tourism supply, in other words, on the emitter of the promotional message: the NTO of the different countries which are subjects of study that promote their national tourist destinations addressing their messages to their main public, both business to business (B2B) and business to customer (B2C). As limitation we point that the absence of objective measures is a limitation. However, the external validation of these variables from the archival data of a subset of respondents increased confidence in the self reports and reduced the risk of common method variance (Sharma 2000).

3. Discussions

The importance of tourism sector in the complex and turbulent socioeconomic scene we are living. From the sixties, when mass tourism appears, to nowadays, tourism has been one of the most successful sectors in overcoming economic crisis such as the current one. And that has been so because it has known how to relaunch its activities, rapidly overcoming transitory moments of weakness, bringing large percentages of profits and generating important direct or indirect effects in national economies, and this has been a key factor of socioeconomic development of many countries (Fernández 2012). Nowadays, tourism represents 11% of the world's GDP; in many countries, it represents its main source of employment and wealth and its growth is expected to continue being superior to that of the rest of the economic sectors (UNWTO 2010).

To have success in such a competitive sector as tourism, a country has to specify what it wants to sell and to whom it wants to offer it (Kotler, Certner 2004), creating clearly differentiated images and tourism identities (Fürsich, Robins 2008), and that of influencing on the decisions to visit a place are complex tasks (Beerli, Martín 2002; Stergiou, Airey 2003). For this reason, the tourism sector is promoting new products aimed at very concrete segments of the market. Some countries have taken the step of dividing the tasks of marketing and policy/planning/development between different organizations. The main one in

Europe is usually the NTO and is awarded the responsibility, among other things, of administering the offices of the international tourism marketing in the country (Morrison *et al.* 1995).

The NTO are aware that creating an image and a distinctive identity among countries is a rather complicated task and for communication tool that maximizes their potential effect on consumer choice, trying to capture specific audiences, avoiding direct touristic messages indiscriminately to large segments of the market (Fürsich, Robins 2008). The same happens in the online environment, where strategies should also be designed to overcome the intangibility, focusing on providing a clear and specific product (Mittal, Baker 2002). Nor is it easy to influence decisions to visit a destination and actually it is known very little about information sources, in fact, it influences the decision to visit the destination. (Beerli, Martin 2002; Stergiou, Airey 2003). In general, the NTO are responsible for several functions: the collection and dissemination of research data, the functions of representation in the markets, meetings and trade fairs organization, familiarization trips, participation in mixed marketing projects, provide support SME and new businesses, various consumer assistance activities and training (Kotler *et al.* 2011). The promotional activities that are most often developed are numerous: advertising, media relations, PR, consumer information services, trade fairs and exhibitions, events for the sector support, celebrations and presence in special events and the maintenance of Web sites (University of Luton 2004).

To achieve this goal, they should promote the country of destination in international travel markets. So the key task of the NTO focuses on the promotion of a country in international markets. The strategic decisions facing the NTO include issues such as: which markets are most attractive, what country specific products are more competitive, how budgets should be allocated for increased promotional effectiveness, and what kind of promotional message should be sent. Hence the important role of tourist communication strategies (Pröll, Retschitzegger 2000), and tourist and travel information related to the place we are going to visit (Lu, Lu 2004) of National Tourism Offices (NTO). The support of a competent government, sound policies and development projects that create value, the establishment of strategic network among the participating companies and different districts, localities and regions lets optimize the potential of its many resources, both because it enables you to share market information, and because it facilitates commercial and promotional cooperation (Gilmore 2004; Daniele, Frew 2005). The NTO are becoming national organizations assume the role of planners and mediators in the consumption of leisure of citizens.

The promotional on/off line approach of the NTO, with the changing needs of current tourism markets, which appear more frequently are mainly concentrated in four areas: a general promotional and trade offer and a specialization with limited features; similar tourist features, as culture, urban and Nature Tourism; predominance of traditional print campaigns against the electronic; and more differentiation index of online campaigns, aspects that we will develop below.

3.1. General promotional, specialization and tourist features

From the point of view of general promotional and specialization, the images which appear in the campaigns of European countries show a very complex and generalized offer of tourism products, with standardized tourist typologies and limited variations for different consumers segments. The research and the bibliographic arguments reflect how the different tourist operators often adopt very similar strategies and styles in the field of promotion (Mittal, Baker 2002). In general, the countries of tourism reference are included in all touristic typologies. That seems to indicate that in a promotional way, the images in campaigns from countries offer, to a greater or lesser extent, the whole of the reference regarding kinds of tourism. The identities created by the different countries showed in the promotional documents analyzed (Table 1), are very similar despite the external differences. The main European tourism places are linked to a visual offer which is very general and without defined targets.

Table 1. Number of promotional documents by country

Country	Printed	On line
Spain	402	22
France	156	28
Italy	180	31
Germany	111	14
TOTAL	849	95

The four analyzed countries have significant enough data to be included in all touristic typologies. Spain, France and Italy seem to set the standards in most of the typologies, even though there are not big general differences, with the exception of some cases.

Among all the touristic typologies presented visually in brochures, Cultural and City Tourism, as well as Nature, Rural and Active Tourism stand out, both with almost 68% and 57% respectively (Fig. 1). Those are quantitatively the two more extended kinds of tourism within the sphere of promotion and have a minor degree of visual specification. That might be because they are very open categories, with a vast amount of interested consumers groups, which easily get the promotional cliché of *for the general* public. This vast group includes many aspects such as Art, monuments (cathedrals, castles and churches), historic buildings, historic cities and towns, museums, archeology, industrial landscapes, historic gardens, historic or artistic events and Shopping Tourism among others. These three kinds are frequently complemented and difficult to differentiate sometimes. For example, trekking can be seen as a sport, a nature activity or a just another spare time activity within the reach of all tourists depending on the country and the promotional campaigns. Active Tourism includes many different activities related to rural and natural environments such as agro tourism, hiking, mountain bike,

bicycle touring, canyoning, speleology and climbing, farm school, kayak, rafting, canoes, horse riding and free fall among others. On the other hand, Nature Tourism usually includes ornithology, hunting, recreational fishing tourism, as well as the interest for landscapes, the flora and fauna (Cano 2006). In general in Europe the historic areas and natural environments appear to be significant selling propositions abroad, indicating a lack of creativity and widespread stereotypes, even taking into account local specifications in heritage, culture and natural resources (Hellemans, Govers 2005).

As far as specialization is concerned, the large quantity of campaigns that do not match the general tourism typologies, can also be interpreted as a commitment of the main worldwide powers of tourism sector to establish their own promotional guidelines, with an emphasis on leaving standardized categorizations aside and on the creation of the necessary tendencies which let them continue leading this industry at long and short term.

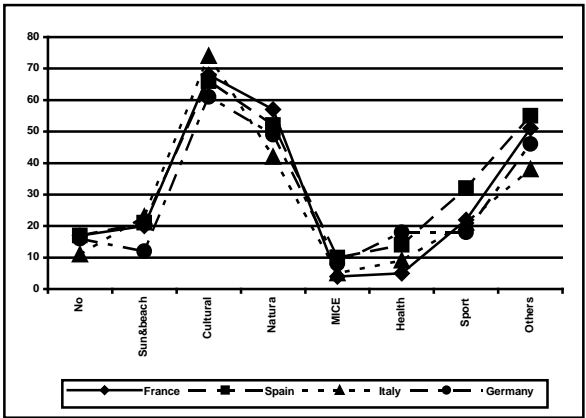


Fig. 1. Type of tourism by categories and countries.

From the point of view of the advantages of specialization with regard to tourist products and places (Kotler, Certner 2004), creating tourism images and identities clearly differentiated (Fürisch, Robins 2008), in the work there are new state of the art tourism modalities, led by France and Spain, sufficiently differentiated, with very significant values and specifically aimed at very concrete sectors (Fig. 1).

Both options could be interpreted as specialization indicators of tourist offer, as they are tourist modalities sufficiently differentiated, with an important promotional weigh and easy to identify by tourism’s consumers. They often appear in the analyzed promotional documents and are not always included in these categories. It is the case of the booming gastronomic tourism, idiomatic tourism, shows and festivals, traditions, casinos, folklore and crafts, markets, sporting,

religious tourism, hotels transports, theme parks, night offer and campaigns aimed at specific sectors like children, couples, families, gay groups, etc.

The total frequency by Countries (Fig. 1) is very significant: more than 50% of the analyzed documents visually show this category. By countries, frequencies are very high: France and Spain lead this classification with a 55% and 51% respectively; the other countries are around 40%. In a similar way, the results achieved when we analyze the tourist typologies present in the contents, where the four analyzed countries mainly choose one or two tourist typologies for every promotional document, are a good example of specialization, as their percentages surpass 90% (Fig. 2).

3.2. Campaigns on/off line

In the interest of its commercial success (Feng *et al.* 2003; Lu, Lu 2004), a first interpretation indicates us that, from a printed documents specialization and promotional coherence point of view, there are no clear differences between campaigns (Lehto *et al.* 2006). If the on-line campaign for tourist consumer should have a series of characteristic from the electronic support, the analysis would show a different reality. The specialization degree of tourism images of promotional campaigns does not depend on the specific support they are aimed at, it is not designed according to that campaign are printed or electronic.

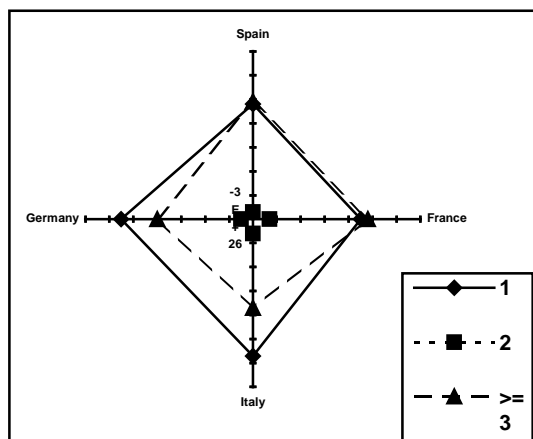


Fig. 2. Quantification of tourism type by categories number (Contents)

The vast majority of the electronic promotional documents (being the percentage of them very reduced compared to that of printed ones, as we can see in Table 1), from the four studied countries that can be downloaded, consulted or printed from the NTO website, are in PDF format. That is the result from a scanning process of the printed brochures given away in stands, something that seems to be far from the technology innovation concept (Buhalis, O'Connor 2005).The information on-line

can be downloaded immediately from the official web page in most cases. However, it is true that this information can be expanded filling the forms, requests through the email, and receive it printed by ordinary mail post. A symbolic payment is sometimes suggested by some destinies (such is the case of Germany). From an E-promotion point of view, Italy, France stands out among the rest of the countries. Regarding PDF brochures, France covers the 50% and Spain the third part. That seems to indicate us that while Spain and France show more traditional approach by repeating online the information shown in tourist stands, Germany bet for an electronic format not shown in printed brochures in fairs.

3.3. Specialization of on line campaiings

ICT (Information and Communication Technologies) and, especially, the Internet revolution have allowed the production process reorganization of tourist products, encouraging specialization and interactivity, becoming the main tool to build brands or to attract visitors to its websites (Lehto *et al.* 2006; Kotler *et al.* 2011). The technologies of the websites help tourist destinations and agencies to reduce costs and attract customers from three instruments: the entertainment, shopping and information. So tourism and the Internet are an ideal combination (UNTWO 2010). The websites providing information to potential visitors and are intended of promotion and marketing of the country, state, province or city. The same it happens with communication of the target image: after the decision has been made, it is greater the number of websites consulted (Teichmann, Zins 2008). However, the problem with the websites of national tourism begins to be the saturation and this leads to confusion for users, because the responsible for tourism promotion seem to forget the user demands. The old axiom "*the more information the better*", begins to be considered strategically incorrect since the tourist seems overloaded and overwhelmed with so much information, which generate in tourists an attitude of refusing.

The image on line of official websites can also provide information on the level of development of each country, showing what is the level of creative development, interactive, the level of access and transparency of information, solving consumer problems and technology management (Fursich, Robins 2008). Although some years ago the network was often chaotic and was not structured in a rigorous way, nowadays all tourism organizations increasingly use it to arrange their activities and services, making good use of its promotion and marketing advantages (Feng *et al.* 2003; Lu, Lu 2004). What is more, tourist companies have the deep feeling that they cannot be considered sector leaders if they are not represented in the network and make good use of its promotion and marketing advantages, increasing their innovation and competitiveness in the future (Buhalis, O'Connor 2005).

Although the Internet allows differentiation between tourism and interaction directly with people, there are no significant differences in a NTO and another.

Most of the websites present basic functions such as to give information and to make a reservations, offering stereotypes and uncomplicated images. It are designed as a visual *mega-site* (a good main page with colors and images with cultural aspects), offering only a short introduction with a link to find out about different aspects of tourism. Therefore the NTO should consider changing its current online promotion: developing websites that can meet the expectations of users who visit them online to find information on tourist activities, allowing them to book their trip online. If the sites do not provide the information that travelers want, they will go to another site. All in an area where it takes place a two-way communication between online travelers and the organization (Han, Mills 2006).

As far as tourism is concerned, the growing popularity of using internet technology in destination marketing by many national tourism organizations is evident globally. Whereas other industries are displaying a stronger hold to traditional processes, the tourism industry is witnessing an acceptance of e-commerce to the extent that the entire industry structure is changing, turning progressively to mobile technology (mobile, smart tourism), (Proll 2000; Werthner, Ricci 2004; Lee 2009). Also, the progressive increase of promotional electronic documents and the advanced of information to i-travellers seems unstoppable, as response to main outbound of tourists countries demand (Germany, USA, UK, France, Italy, etc.), because they are among the largest countries in terms of Internet users.

4. Conclusions

This research has been focused on the level of generalization and specialization of campaigns for international tourism promotion of France, Spain, Italy and Germany by means of printed and electronic promotional documents. It reflects, on the one hand, that tourist operators often adopt very similar strategies and styles in the field of promotion, and that the images which appear in the documents show a very complex and generalized offer of tourist products, with several standardized tourist typologies, mainly Cultural and Nature tourism and, on the other hand, new state of the art tourist modalities develop in a parallel way, leaded by France and Spain, sufficiently differentiated, with very significant values and specifically aimed at very concrete sectors. Results of this scientific work confirm:

1. A general promotional and trade offer and a specialization with limited features, since appear significant values to categories of last generation tourist products, amongst them stressed related to gastronomy and aimed at very concrete consuming segments.
2. That offers similar tourist features, as Culture, Urban, Shopping Tourism; and Nature, Active and Rural Tourism.
3. With clear predominance of traditional print campaigns against the electronic. These could be downloading, consulting and printing from National Tourist Bureau website, almost entirely in PDF format.

4. And more differentiation index of online campaigns, although it seems that exist very significant differences among national website either.

Results suggest modifications in the current tourist promotion by changes in design and planning of online communication principally destined to optimize tourism information and promotion through the Internet. Tourism and the Internet provide a suitable combination. Such actions are aimed at consumers who are increasingly sophisticated, experienced and demanding, and also face the growing problem of saturation and an insufficient interactivity of information and commercial messages.

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