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Destination Cape & Western Cape: Analysis of destination brand awareness, identity and image in the domestic market

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ABSTRACT

This study assesses destination awareness, brand image and identity of destination Cape Town & Western Cape in the South African domestic market. Data for this study were collected through a structured questionnaire from a stratified random sample of 2464 South Africans 16 and over. Different analysis methods were used including: descriptive analysis, chi-square tests and logistic regression. Results showed that Cape Town & Western Cape has the highest top of mind (TOM) destination awareness among competing domestic destinations. The Cape Town regional tourism brand was the most recognizable brand among all regional tourism brands. However, overall destination brand awareness was found to be low and some conflicts were noted between destination brand identity and image.

Keywords: *Destination brand awareness, identity, image, Western Cape*

INTRODUCTION

This study analyses destination brand awareness, image and identity of the destination brand Cape Town & Western Cape in the South African domestic market. Brand Cape Town & Western Cape was launched in 2004 with the establishment of Cape Town Routes Unlimited (CTRU), the Provincial Destination Marketing Organization (DMO). The mandate of the DMO is to market the Western Cape Province as a premier destination both locally and globally. Brand Cape Town & Western Cape along with six regional brands were developed to enhance the destination's image and more importantly to present a consistent message and image about the destination through a well-organized single representative channel.

The domestic market is important to the South African tourism industry as it accounts for about 79% of the country's total tourism volume; 23% to 27% of total tourism expenditure and about 3% of GDP (South African Tourism (SAT), 2011). While international tourism accounts for the majority of tourism expenditure in the Western Cape Province, domestic tourism is just important for the province's tourism sector. The Western Cape receives an average of about four million domestic trips a year and R3.3 billion from domestic tourism (SAT, 2011). The main domestic source markets for the Western Cape Province are: the Western Cape itself, Gauteng, the Eastern Cape and KwaZulu Natal (KZN). The Western Cape is marketed under six themes identified as representing the whole destination's identity including: Good Food and Wine; Cosmopolitan Vibe; Body, Mind & Spirit; Outdoor Active; Natural Scenic Beauty; Rich Culture and Heritage.

Given the importance of the domestic market to the tourism industry; the increasing competition among different domestic destinations and the launch of all these new destination and regional brands, it is important to evaluate the level of destination and brand awareness to ensure that the destination competes effectively and achieves its goals and objectives. Destination Cape Town & Western Cape faces increasing competition from the KwaZulu Natal province which is one of the top domestic destinations in the country and also closer than the Western Cape to the major tourism source province of Gauteng. However, since the launch of the destination and regional brands no studies had been done to assess the level of destination and brand awareness among the major source markets for destination Cape Town & Western Cape. This study, therefore, sought to assess the level of destination and brand awareness in the domestic market in relation to other competing domestic destinations. The study also compares the destination image in the domestic market and the destination identity. Brand identity is defined as the supply-side perspective of the brand concept, while brand image is defined as the demand driven perspective on a destination's brand (Konecnik & Go, 2008). This study sought to answer the following questions: What is destination Cape Town & Western Cape's level of destination awareness in relation to competing destinations? What factors affect destination awareness? What is the destination's image in the domestic market? How does the image vary by source market and prior travel experience in the destination? Does the destination identity match with the destination image?

Objectives

This study assesses three destination brand dimensions for brand Cape Town & Western Cape including destination awareness, brand image and brand identity. The specific objectives of the study are to:

- Assess Top of Mind (TOM) destination awareness of destination Cape Town & Western Cape in the domestic market in comparison to other competing domestic destinations.
- Establish destination Cape Town & Western Cape's image in the domestic market and how the image varies by market and by whether or not one has visited the destination.
- Assess destination brand awareness of Cape Town & Western Cape and the related six regional brands.
- Compare the destination image to the destination identity
- Identify the factors affecting destination awareness

Destination awareness is measured by whether or not the destination immediately comes into mind when one is thinking of taking a vacation within South Africa. Brand image is regarded as the views that tourists and potential tourists hold about the destination. In this study destination image is measured through both an open ended question asking respondents what they think the destination brand represents and also through a series of twenty statements from which respondents were asked to select the top five statements they thought best represented brand Cape Town and Western Cape. Destination brand identity is defined by the six tourism themes under which destination Cape Town & Western Cape is marketed.

LITERATURE REVIEW

The history of branding traces back to the late 19th century with branding of consumer products (Blain, Levy & Ritchie, 2005). While branding of consumer goods has been widely studied, most destination marketing organization managers still narrowly interpret branding, equating it to logos and taglines (Blain et al. (2005). There is more to branding than logos and taglines including identification of goods and/or services and differentiation of those goods and/or services from those of competitors (Aaker, 1991; Ritchie & Ritchie, 1998). Ritchie and Ritchie (1998), extend the meaning of destination branding to include the brand's role in conveying the promise of memorable travel experiences uniquely associated with the destination, as well as its role in consolidating and reinforcing the recollection of pleasurable memories of the destination experience.

As competition for tourists grows and destinations become more substitutable, destination branding is gaining popularity as it is seen as critical for destination identification and differentiation from many alternatives in the consumer's mind (Eckinci & Hosany, 2006; Qu, Kim, & Im, 2011). Research on destination branding previously focused mainly on destination image (Echtner & Ritchie, 1993; Baluglo & McCleary, 1999; Mackay & Fesenmaier, 2000; Sirgy & Su, 2000), but more has recently focused on other components of destination branding as researchers call for consideration of other brand assessment dimensions (Hackinson, 2004; Boo, Busser & Baluglo, 2009). Qu et al. (2011) acknowledge that the core of destination branding is to build a positive destination image that identifies and differentiates a destination. Qu et al. (2011) concluded that destination image is a multi-dimensional construct influenced by cognitive, unique and affective images that together influence tourist behaviour. Image, therefore, plays a mediating role between the cognitive, unique and affective brand associations and behavioural intentions.

Other researchers have discussed the concept of brand and destination personality in relation to destination branding (Aaker, 1997; Henderson, 2000; Santos, 2004; Eckinci & Hosany, 2006; Murphy, Moscardo & Benckendorff, 2007). Brand personality is defined by Aaker (1997) as the set of human characteristics associated with a destination. Eckinci and Hosany (2006) argue that today's competitive environment demands that destination managers create and manage an appropriate destination personality to effectively position and differentiate themselves from the competition as tourists can articulate different destination personalities (Murphy et al., 2007). Boo et al. (2009) discuss several other brand dimensions including: customer-based brand equity; destination brand awareness; destination brand quality; destination brand value; and destination brand loyalty. Brand awareness is one of the main components of a brand's effect in tourism and it represents the strength of the brand's presence in the consumer's mind (Boo et al., 2009).

This study focuses on three dimensions: destination awareness, brand image and brand identity and compares the image to the identity. Konecnik & Go (1998) differentiate brand identity and image depending on whether it represents the demand or supply side perspective.

Brand image offers the demand side perspective while brand identity represents the supply side perspective. Destination Cape Town & Western Cape has a clearly defined identity based on the destination's six tourism marketing themes discussed earlier. This study, therefore, investigates the demand-side perspective (image) and compares it to the established destination identity.

METHODS

Data for this study were collected through an ACNielsen onmibus study in June 2007 from a stratified random sample of 2464 South African residents sixteen years and over. The sample was stratified by province of residency to achieve a representative sample across all the nine provinces. The survey tool was a structured questionnaire with a set of open and closed ended questions soliciting information on destination and brand awareness, along with some basic demographic information.

To assess top of mind (TOM) destination awareness respondents were asked to state a destination that immediately comes to mind when thinking of taking a domestic pleasure trip. Brand awareness was measured at three levels. First, respondents were shown several destination brand logos and asked if they recognised the brand logo. Second, respondents were shown several logos and asked to state what they thought the brand logos represented. Third, respondents were asked to select five out of a set of 20 statements that they felt best described destination Cape Town and the Western Cape. Data analysis included descriptive analysis to establish general demographic trends and levels of awareness of different destination and regional brands. Logistic regression was used to determine the factors affecting destination awareness.

RESULTS

Demographics

A total of 2646 interviews were completed, of which 50.1% were male and 49.9% were female. Half of the respondents were under the age of 34 years and the other half was over 34. The respondents were about evenly distributed among four different languages including: Sotho, Nguni, English and Afrikaans. Over 60% of the respondents belonged to Living Standards Measure (LSM) of six and higher. LSM is a tool used to measure standard of living in South Africa through evaluation of assets and wealth. The measure has 10 categories from 1 to 10, lowest to highest. Table 1 below summarizes the demographic information including: gender, age, monthly income, language, Living Standard Measure (LSM) race and province of residency.

Table 1: Demographic information

Variable		Frequency (n=2464)	Percent (n=2464)
Gender	Male	1234	50.1
	Female	1230	49.9
Age	16-24	780	31.7
	25-34	477	19.4
	35-49	602	24.4
	50+	605	24.6
Monthly Income	R8 000+	748	30.4
	R4 000-R7 999	723	29.3
	R800-R3 999	881	35.8
	R1-R799	112	4.5
Language	Sotho	585	28.9
	Nguni	712	23.7
	English	653	26.5
	Afrikaans	514	20.9
LSM	1-3	128	5.2
	4	245	9.9
	5	337	13.7
	6	581	23.6
	7	381	15.5
	8	303	12.3
	9	307	12.5
	10	182	7.4
Race	Black	1297	52.6
	White	293	11.9
	Indian	240	9.7
	Colored	634	25.7
Province	Western Cape	397	16.1
	Eastern Cape	217	8.8
	KwaZulu Natal (KZN)	498	20.2
	Free State	170	6.9
	Northwest & Northern Cape	151	6.1
	Mpumalanga & Limpopo	158	6.4
	Gauteng	873	35.4

Top of mind (TOM) destination Awareness

Cape Town (28.5%) was cited as the top destination that comes to people's minds when thinking of taking a pleasure trip within South Africa, followed by Durban (24%), Johannesburg (5.2%), Mpumalanga (4.9%) and Port Elizabeth (2.4%). Provincially, the Western Cape is the top destination that people consider when thinking of taking a vacation, followed by KwaZulu Natal (KZN) and Gauteng (refer to Figure 1). While Cape Town and the Western Cape leads in TOM destination awareness KZN is a very close competitor.

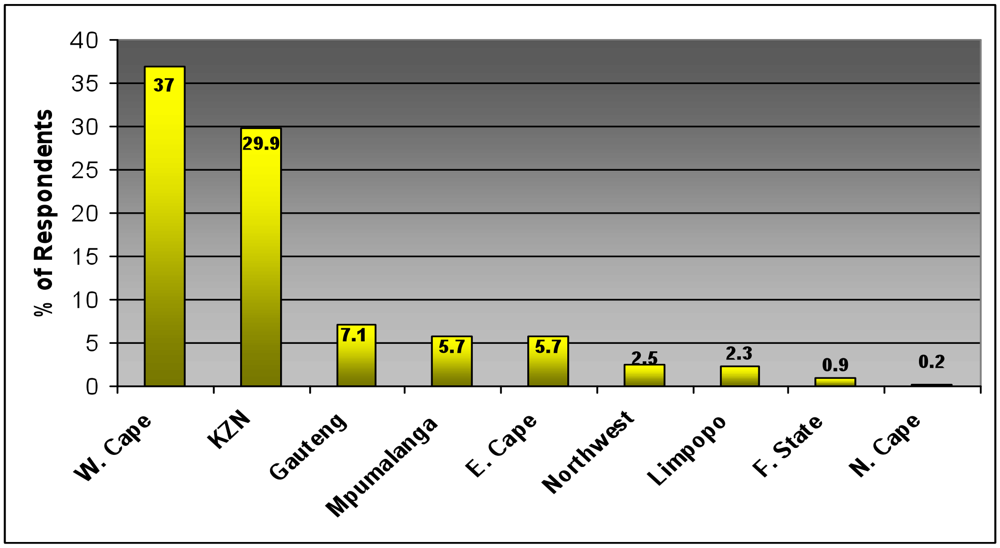

Figure 1: TOM destination awareness by province (n=2464)

Logistic regression results showed that four factors (age, community, income, and prior visit) significantly affect destination awareness. Three factors (gender, LSM and province of residency) were not significant. Table 2 below summarizes the logistic regression results:

Table 2: Logistic regression results for destination awareness

Variable	B	S.E.	Wald	Sig.	Exp. (B)
Age	-.149	.051	8.444	.004	.861
Community	-.593	.117	25.906	.000	.552
Income	.217	.094	5.354	.021	.805
Prior visit	.259	.151	2.936	.087	1.296
Constant	3.157	.494	40.933	.000	23.512

The final model is:

$$Log\ (p/1\text{-}p) = 3.157 - 0.149*Age - 0.593*Community + 0.217*Income + 0.259*Prior\ visit$$

Where: p = Probability of destination awareness
Age = Age group of respondent
Community = Residential community of respondent (urban or non-urban)
Income = Monthly income category of respondent
Prior visit = Whether or not the responded has visited the Western Cape before

The Nagelkerke R Square was 0.38 and the Hosmer-Lemshow test showed that the model was a good fit (p = 0.895), indicating that the predicted model didn't significantly differ from the observed. The results show that age negatively affects destination awareness. For every unit decrease in age the predicted log odds of destination awareness increase by 0.149 holding all the other variables constant. Living in an urban community; higher income and having visited the Western Cape before all increase the odds of destination awareness.

Destination Brand Awareness and Image

First, respondents were shown the different regional brand logos of destination Cape Town and Western Cape. Results showed that more people recognized the Cape Town regional brand logo than any other regional destination logos, including destination Cape Town and Western Cape's mother brand. About 33% of the respondents didn't recognize any of the brand logos. Table 3 below summarizes the brand awareness/recognition results.

Table 3: Destination Cape Town & Western Cape brand logos and percentage of respondents recognising the brand

Region	Brand logo	% of respondents recognizing the brand logo (n=2464)
Cape Town & Western Cape (Mother brand)	CAPE TOWN & Western Cape	34
Cape Town (city)	CAPE TOWN	56.7
Cape Garden Route	CAPE GARDEN ROUTE & KLEIN KAROO	26.7
Cape Winelands	CAPE WINELANDS	23.7
Cape West Coast	CAPE WEST COAST	23
Cape Karoo	CAPE KAROO	22.2
Cape Overberg	CAPE OVERBERG	14.4

Cape Town regional brand was the most recognizable, most probably because Cape Town is the gateway to the rest of the regions in the province as the provincial international airport is located in the city of Cape Town. Chi-square analysis showed that brand recognition of the destination mother brand varied by several factors including: province of residency, respondent race, community, LSM and income. Respondents from urban communities were more likely to recognise the brand than those from non-urban communities, while those with higher income and from higher LSM categories were also more likely to recognize the destination brand logo. Brand recognition didn't significantly differ with gender.

Second, brand awareness and image were assessed by asking respondents to state what they thought each of the brand logos shown to them represented. Several brand logos were shown to the respondents, but only the results related to the Cape Town & Western Cape mother brand are discussed here. The results were rather disappointing as they showed that the majority of respondents associated the brand with things, not what destination management markets the destination as. None of the responses aligned with the six destination themes discussed earlier under which the destination is marketed, signaling overall very low destination brand awareness. About 20% of the respondents didn't know what the brand logo represented; 12% thought it was the city of Cape Town's municipal brand; 5.4% thought the brand represented things completely unrelated to tourism, while 2.4% stated that the brand represented nothing. Over two thirds of the respondents were not even aware of the destination brand logo. However, the results also showed that the destination's image in the domestic market includes positive attributes such as sunny, relaxing and peaceful. Altogether, a total of about 28.3% of the respondents associated the brand logo with tourism related activities even though none of the associations were related to the six themes under which the destination is marketed (refer to figure 2).

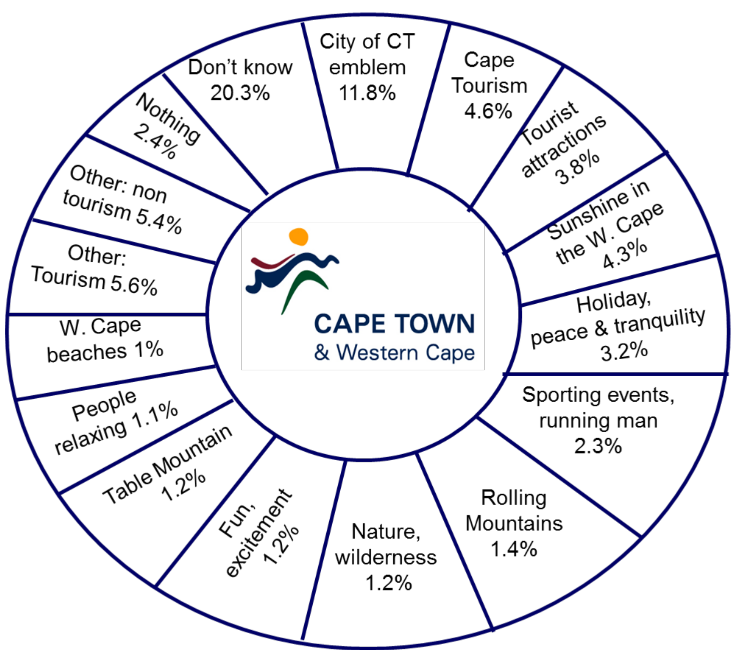

Figure 2: What destination Cape Town & Western Cape represents to the domestic market (n=2464)

Finally destination brand awareness and image were assessed by asking the respondents to select the top five out of 20 image statements that they thought best represented destination brand Cape Town & Western Cape. The results showed that the domestic market views the destination mostly as just beautiful; beautiful white sandy beaches; Good food and wine; friendly and relaxing (refer to Table 4). While the results were positive, they also revealed low destination brand awareness as only one of the six themes (Good food and wine) made it into the top five, implying that the brand's image in the domestic market is not in line with the destination's brand identity.

Table 4: How the domestic market views destination brand Cape Town & Western Cape

Item	**% or respondents (n=2464)**
Beautiful	32.7
Beautiful white sandy beaches	29.3
Good food and wine	28.1
Friendliness	25.9
Relaxation	25.1
Natural and scenic beauty	24.1
Rich culture and heritage	18.2
All year round destination	17.5
Shopping	14.2
Welcoming	13.8
Outdoor active	13.2
Escape from busy life destination	13.0
Great events	12.7
Business destination	11.9
Diversity of experiences	10.8
Warm and caring	10.5
Body mind and spirit	10.2
Cosmopolitan vibe	7.9
Vibrant nightlife	7.5
Wedding/Honeymoon destination	6.7

Analysis of image by whether or not respondent had visited the destination showed differences between these two groups. Those that had visited the destination before viewed the destination mostly as a: good food and wine; beautiful white sandy beaches and just beautiful destination. On the other hand those that had not visited the destination perceived the destination to be: just beautiful, relaxing and friendly (refer to Figure 3). It must be encouraging to destination marketers that the majority of the respondents that viewed the destination as friendly and beautiful had actually visited the destination, implying that their evaluation was based on experience rather than perception.

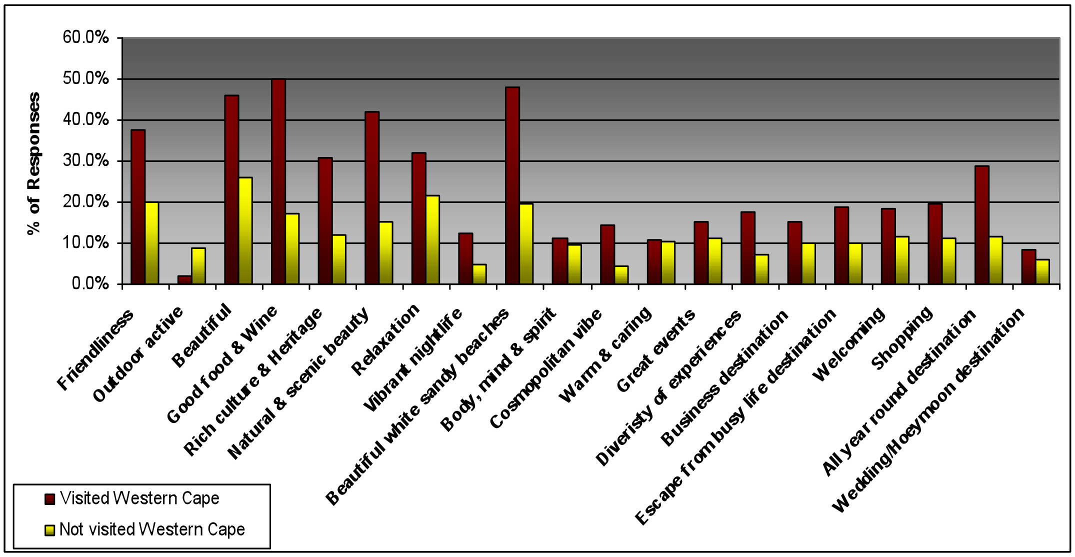

Figure 3: How the domestic market views destination Cape Town & Western Cape by whether or not one has visited the destination

Analysis of image by domestic source markets of Gauteng, Eastern Cape and KZN showed that all the major source markets view the destination mostly as: just beautiful; with beautiful white sandy beaches, good food and wine; friendly and relaxing (Figure 4).

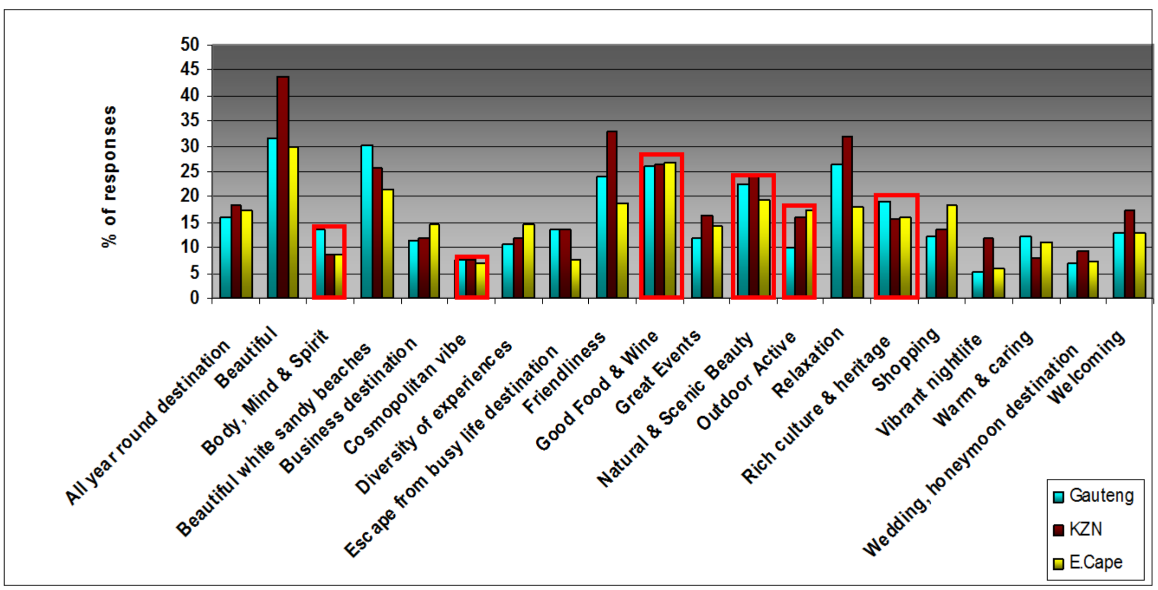

Figure 4: How the domestic market views destination Cape Town & Western Cape by major source market.

In border are the existing six themes that represent the identity of destination Cape Town and Western Cape. Only one of the six themes (Good food and wine) comes close to representing the image that the domestic market has about the destination. The other two (Cosmopolitan vibe and Body mind and spirit) are not seen as representing the destination brand at all. There is apparent conflict between how destination managers perceive, define and present the destination and how the tourists view the destination. The domestic market views the destination mainly as: just beautiful, relaxing, and friendly, while the destination is portrayed under six themes including, among others: cosmopolitan vibe, good food and wine, outdoor active and rich culture and heritage. It is clear that the destination's identity is not in sync with the image that the domestic market has about the destination. Gauteng, Eastern Cape and KZN are major domestic source markets for destination Cape Town & Western Cape and they view the destination as beautiful, friendly and relaxing.

CONCLUSION

The findings have important implications to the marketing and management of destination Cape Town & Western Cape. Even though the destination had the highest TOM destination awareness, KZN was a very close second and is a viable threat to destination Cape Town and Western Cape. KZN also has an added advantage of being closer than Cape Town to the major domestic source province of Gauteng. There is need to re-evaluate the destination identity and position with regards to the domestic market, as the results show that there exist discrepancies between destination identity and image. Kapferer (1998) stresses the importance of brand identity stating that before we know how others perceive us we must know who we are. Destination Cape Town & Western Cape needs to re-evaluate who they are as the targeted market doesn't seem to view the destination as it portrays itself. The destination could capitalize on its image of being: just beautiful; friendly and relaxing to distinguish itself from other competing destinations. The destination is marketed as among others, a cosmopolitan vibe (vibrant nightlife) destination and rich culture and heritage, placing itself in direct competition with Johannesburg (in Gauteng province) nationally known for its vibrant nightlife and KZN also well known for its rich culture and heritage. Focusing on the destination's unique strengths would differentiate it from the competition and also enable effective use and allocation of marketing resources.

The lack of understanding of what the destination brand represents is a call to action for destination managers to focus marketing resources on enhancing brand awareness. There is also need to streamline the brands as there are too many brands associated with the destination that seem to be causing some confusion in the market. Respondents were confused by the many regional destination brands, the DMO corporate and municipal brands.

Destination marketers for destination Cape Town & Western Cape need to focus their marketing resources on lucrative markets including: more urban than non-urban communities, those with higher income and those that have visited the destination before. Logistic regression results showed that: the community in which potential tourists reside (urban or non-urban); age; income and repeat visitation affect destination awareness. Repeat visitors are important to the destination as prior visitation increased the likelihood of the destination being considered for future visitation.

The main limitation of this study was the limited space there was to ask more questions given that it was an omnibus study. While there were some open-ended questions, the closed ended image questions focused on the positive aspects of the destination only. Also, the questions could have provided more information if they were based on a likert rating scale. Future branding research for the destination should focus on other brand dimensions such as brand personality and loyalty and on how all these dimensions translate to destination performance, in terms of actual visitation, repeat visitation and expenditure.

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