Competitive positioning of winter tourism destinations: A comparative analysis of demand and supply sides perspectives—Cases from Turkey

Savaş Evren⁎, Nazmi Kozak

ABSTRACT

This study was conducted to determine the competitive positions of five winter tourism destinations in Turkey. The explanatory sequential mixed method was used in order to compare the views of both the supply and demand sides. A questionnaire was first applied to current and potential visitors of the related destinations (n = 417), both in the field and online, followed by semi-structured interviews conducted with destination stakeholders (n = 12). It was observed that visitor perceptions positioned Uludağ with its tourism superstructure means and entertainment opportunities, Kartalkaya with its tourism superstructure quality and service quality, Erciyes, with its reasonable pricing policy and uncrowded slopes/lifts, Palandöken with its adequate number of lifts and snow quality, and Kartepe, with its beautiful scenery and accessibility. The assessments of the destination stakeholders demonstrated that strategies for strengthening the current position was not accepted at every destination and that only some destination stakeholders were inclined toward repositioning.

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1. Introduction

One of the primary challenges in destination marketing is that of destination differentiation and the recognition of this differentiation by current and/or potential visitors. Differentiation is in fact becoming even more significant due to the rapidly increasing number of destinations in the marketplace and the increasing ambiguity of differentiation between them. This, in part, can be attributed to the effect of modernization and technological advances in tourism with standardization and ‘dedifferentiation’ in products and services the frequent, albeit not always intentional, outcome (Pike, 2008). Ries and Trout (2001), thus stated that the focus of marketing strategy must be on the ‘battle’ of differentiation in the customers’ minds against competitors, and emphasized the importance of the positioning strategy.

Winter tourism destinations face particular challenges of dedifferentiation. In winter tourism (Hudson, 2003), the number of destinations has increased rapidly and the perceived image become dedifferentiated, especially since 1980s. Vanat (2017), for example, stated that there are more than 2000 winter tourism destinations and around 125 million ski tourists worldwide, despite the overall stability of the total number of visitors in the last 10 years. He also stated that mature markets reduced their growth while other markets were emerging and growing. In Turkey, as one of the growing markets, the number of winter tourism destinations has increased, especially after the 2000s, and the volume of the domestic market has improved significantly. Current studies indicate that the number of skiable areas in Turkey has reached 51 (Demiroğlu, 2014, 2015). It can be observed that the number of winter tourism destinations in Turkey, which is not often associated with winter tourism in international markets, is high with expectations that the numbers will increase further in the future. Thus, it can be argued that one of the most important marketing efforts for winter tourism destinations, both in the world and in Turkey, should be that of competitive positioning. In this context, the aim of this study is to examine the competitive positioning of five leading winter tourism destinations in Turkey and to reveal a better understanding of the competitive positioning of destinations.

The review of the literature that follows demonstrates that there are a limited number of studies on the positioning of winter tourism destination (Faullant, Matzler, & Füller, 2008; Frochot & Kreziak, 2008). Furthermore, it was observed that positioning studies conducted on winter tourism destinations or on other types of destinations were carried out only in the framework of visitor perceptions. This provides cause for concern in that the position the manager tries to create in the minds of the potential visitors is also important. In some cases, the current position might not generate sufficient profitability and repositioning efforts might be required. At that point, the positioning
preferences of the managers become prominent. In this study, it is thus accepted that positioning is not just about visitor perceptions. As such, visitor perceptions and the views of destination stakeholders were assessed together.

2. Literature review

2.1. Destination positioning

According to Ries and Trout (2001) – pioneers of the field – positioning is differentiation of a brand in the mind of a potential customer when compared to competitors. As can be understood from the definition, the most important issue in positioning is differentiation in the competitive marketplace, as marketing is actually a battle and the minds of the customers are the battlefields for the brands. In today’s competitive environment, neither being production oriented, as in the 1920s, nor being customer oriented, as in the 1950s, can bring success: today, success requires orientation for competitiveness. What is important in this case is to be perceived as different (Ries & Trout, 2001, 2006). Since tourism destinations have become differentiated with the effect of globalization and modernization (Dann, 2000; Pike, 2008; Plog, 2000), it has become ever-more important to be perceived as different from other tourism destinations. At the forefront of the strategies that distinguish destinations from their competitors in the minds of customers and to enable them to gain a different position is competitive destination positioning/repositioning.

The positioning of a destination is the process of establishing a distinctive place of that destination in the minds of potential visitors (Gartner, 1989), and is about how a destination is perceived by current and potential visitors when compared to the competition. This perception could be either the result of the experience of the visitors or the result of the image management efforts by the destination itself (Ritchie & Crouch, 2000). Moreover, the perceived image of that destination is not sufficient for the determination of the competitive position of the said destination; images of rival destinations should be evaluated comparatively as well (Chen & Uysal, 2002). According to Pike (2008), the destination positioning process begins by determining the target market and general travel conditions in the target market, and then by identifying the competitors, determining the current/potential visitors, identifying perceptions about the strengths/weaknesses of each competitor, and identification of the opportunities/options for differentiated positioning. In the final stage, the competitive position is selected and implemented, and the success of the positioning strategy is assessed over time. According to the author, one of the most important issues in this process is the fact that the destination attribute(s) to be used in the positioning strategy should be important, salient and determinant in the procurement process.

The literature review demonstrates that there was an increase in studies on destination positioning, especially since 2000s. Coastal destinations (Botha, Crompton, & Kim, 1999; Pike & Mason, 2011), convention destinations (Baloglu & Love, 2005; Kim, Sun, & Ap, 2008; Kim, Yoon, & Kim, 2011), golf destinations (Kim & Chun, 2005), honeymoon destinations (Kim, Agrusa et al., 2005), and urban destinations (Prayag, 2007) were scrutinized in terms of positioning. Furthermore, countries (Claveria & Poluzzi, 2017; Gürsoy, Baloglu, & Chi, 2009; Kim, Guo, & Agrusa, 2005; Li, Cheng, Kim, & Li, 2015) and provinces (Chen & Uysal, 2002) have been the subjects of positioning research as macro destinations. One of the most common techniques to analyze the competitive positions of destinations is perceptual mapping. In this technique, participants are asked to compare several competing destinations, and the competitive positions of the destinations are examined on maps that contain scattered attributes and destinations. Researchers mostly apply multidimensional scaling (MDS) or correspondence analysis to obtain the perceptual maps, and interpret the competitive positions of destinations according to the distance of destinations to the attributes on the maps.

For example, Kim and Chun (2005) examined seven golf destinations within the scope of ten attributes and applied MDS to obtain perceptual map. They revealed that Japan’s and China’s competitive positions comprised of ‘inexpensive travel cost’, while Australia and Hawaii held the positions for ‘comfortable environment’, ‘beautiful scenery’, ‘safety’, ‘recognition of golf resort’, ‘excellent golf resort facilities’, ‘good climate’, and ‘family tour programs’. Chen and Uysal (2002) applied correspondence analysis to obtain a perceptual map of ten competing states of the US as convention destinations. They stated that Virginia, North Carolina and Pennsylvania held strong competitive positions for hiking activities; Maryland and New York shared the lead on attending festivals and special events. Besides perceptual mapping, there other techniques exist to analyze the competitive positions of destinations, such as general linear models (GLM), paired t-tests, and importance-performance analysis (IPA). In these techniques, similar to perceptual mapping techniques, researchers measure comparative perceptions of participants towards several rival destinations within the context of some attributes. The attributes that show the strengths of destinations are defined as competitive positioning elements of destinations. For example, Baloglu and Love (2005) examined the competitive positioning of Las Vegas, Chicago, Dallas, Atlanta, and Orlando from meeting planners’ point of view and applied GLM. They revealed that Chicago was positioned with ‘Restaurant/Retail/Accessibility’, while Las Vegas, Chicago, and Orlando held the positions for ‘Facilities’. Pike and Ryan (2004) examined competitive positioning of Rotorua, Bay of Islands, Taupo, Mount Maunganui, and Coromandel as short break destinations by applying IPA. They revealed that only Rotorua and Coromandel have distinctive positions. Rotorua has strong competitive position on ‘the good life/infrastructure’, and Coromandel’s position comprised of ‘getting away from it all’.

2.2. Positioning of winter tourism destinations

Winter tourism is one of the most rapidly growing markets within tourism. Despite the negative effect of global warming, the number of destinations and skiers is increasing constantly (Vanat, 2017). Skiers, especially in countries where winter tourism is well developed, have hundreds of choices in the destination selection process. Since it is hard to keep that many choices in the mind, skiers place only a few of those destinations in their minds, with only the destinations that apply effective positioning strategies can conquer distinctive places in the visitors’ minds (Ries & Trout, 2001).

Although limited in number, studies on the positioning of winter tourism destinations can be found in the literature (Faullant et al., 2008; Frochot & Kreziak, 2008). Faullant et al. (2008) examined the competitive positioning of ten winter tourism destinations based on the perceptions of satisfaction of two different market segments (under 25 years old and over 50 years old). According to the findings of this study, in the market segment under the age of 25, the similarities between St. Moritz and Obertauern-Mayerhofen, and Lech/Zürs and Dolomiti Superski, were high. Also in this market segment, St. Moritz has a competitive position based on ‘slopes’ and ‘parties’ items, while Taggenburg has a competitive position based on ‘price’ and ‘kids slopes’ items. Frochot and Kreziak (2008) utilized focus group interviews in the study they conducted on six French winter tourism destinations. In the study, the destination brochures were evaluated by those who participated in the focus group interviews. In light of these evaluations, the researchers identified the images of these destinations. Findings demonstrated that destinations generally had similar images with this being negative for positioning. However, it was stated in the study that there were also attributes that differentiated the images of the related destinations and that the destination marketers should focus on these.

Sainaghi (2008) also conducted a study on the performance and positioning of winter tourism destinations. However, the competitive positions that the author scrutinized were only related to the duration of the stay. In this context, the author investigated nine ski destinations in the Italian Alps, and considered only whether the visitors purchased
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