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Successful destination branding?
A case study of Brussels, Istanbul and Stuttgart

Abstract

Tourism is an important source of economic growth for destinations, which is why the interest for destination branding has grown in recent years. Meanwhile, Destination Marketing Organisations (DMOs) often struggle to promote their destination successfully. For instance, many stakeholders influence the perception of a destination and therefore it is difficult to create a coherent image. Some destinations have a more successful destination branding, which not only depends on their marketing methods but also the pre-requisites of the city. Hence, destination branding is a complex process where there is no standard solution. Therefore, three different destinations are used as a basis for the thesis; Brussels, Istanbul and Stuttgart. What can be learned from the marketing methods in these destinations? The purpose of this thesis is to examine the current market position of Brussels, Istanbul and Stuttgart as tourist destinations and their marketing strategies and methods used to promote the destinations. We will identify general recommendations on how to improve the destination branding, and propose specific recommendations to selected DMOs in the destinations.

Through the use of specific descriptive criteria, such as unique selling points (USPs), image and marketing channels, as well as the conducting of interviews with employees in higher administrative positions within the selected DMOs, the thesis aims at providing the reader with a deeper knowledge in the field of destination branding. The Tourist Area Lifecycle Model was used to analyse the destinations to understand their situation today and future possibilities and challenges in marketing the cities as tourist destinations. Moreover, the concepts of comparative and competitive advantages and the integrative model by Ritchie and Crouth was used to discuss the competitiveness of the destinations. The research shows that DMOs face problems, such as the lack of a coherent image, common goals, the coordination of activities between DMOs in different levels and cooperation between different stakeholders. These are areas that need attention from the DMOs in order to achieve successful destination branding and are included in the conclusion, which helps DMOs to improve their marketing methods in order to achieve success in the promotion of their destination.

Key words: Brussels, destination branding, destination image, destination marketing, destination marketing organisation, DMO, Istanbul, Stuttgart
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<th>Description</th>
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<tr>
<td>BITC</td>
<td>Brussels International Tourism &amp; Congress</td>
</tr>
<tr>
<td>DMAI</td>
<td>Destination Marketing Association International</td>
</tr>
<tr>
<td>DMO</td>
<td>Destination Marketing Organisation</td>
</tr>
<tr>
<td>EU</td>
<td>European Union</td>
</tr>
<tr>
<td>GNTB</td>
<td>German National Tourism Board</td>
</tr>
<tr>
<td>ICVB</td>
<td>Istanbul Convention &amp; Visitors Bureau</td>
</tr>
<tr>
<td>MICE</td>
<td>Term used within the tourism industry to describe the target group for Meetings, Incentives, Conferences and Exhibitions.</td>
</tr>
<tr>
<td>MoT</td>
<td>The Ministry of Culture and Tourism in Turkey</td>
</tr>
<tr>
<td>OPT</td>
<td>Office de Promotion du Tourisme de Wallonie et de Bruxelles</td>
</tr>
<tr>
<td>TALC</td>
<td>Tourism Area Life Cycle Model</td>
</tr>
<tr>
<td>TF</td>
<td>Toerisme Vlaanderen</td>
</tr>
<tr>
<td>TTC</td>
<td>Travel and Tourism Competitiveness (referring to the World Economic Forum’s report of 2009)</td>
</tr>
<tr>
<td>USP</td>
<td>A USP, Unique Selling Proposition, is a real or perceived benefit of a good or service that differentiates it from the competitors offer (<a href="http://www.businessdictionary.com">www.businessdictionary.com</a></td>
</tr>
<tr>
<td>WTO</td>
<td>World Trade Organisation</td>
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1. Introduction

This chapter presents the background of the thesis, the purpose of the study and a discussion of the research problem leading up to the research question.

Take a minute to think of the last destination you visited. What evoked your interest in it? Maybe you had heard of the destination earlier and formed an image of it in your mind? Common selling arguments are the rich culture, the friendliest people and delicious food. With this in mind, one can clearly see that it is important to create a unique identity so that a destination can differentiate itself from other destinations, and ultimately to get potential tourists to actually visit the destination.

1.1 Background

Destination marketing is an area that began to grow in the early 90s after the realization that marketing a destination is different from marketing a product. Today thousands of destination marketing organisations (DMOs) compete for the attention of consumers through busy communication channels. (Dimance 2005) However, the field of destination branding is complex and many factors need to be taken into consideration.

Practitioners often find academic texts on this subject to be too difficult and far from reality since there is a big gap between theory and practice within the area. (Pike 2008) Since the academic texts are often abstract and difficult to apply on a concrete situation, it is difficult for practitioners to find concrete methods and recommendations on how to implement good and effective marketing activities that attract tourists to a destination. This lack of best practice was the reason why the authors of the thesis decided to research this further to overbridge the gap between theory and practice. As the authors have had the opportunity to live in three different cities in three countries, the choice of cities was quite obvious and formed the approach to the subject. A case study with interviews and analysis of the current activities in three cities, Brussels, Istanbul and Stuttgart, emerged as the natural approach. After all, co-operation between competing and complementary destinations can help regions to learn from each other and to adapt to demand requirements (Buhalis 1999).

1.2 Research problem

Since every destination is a possible travel destination, many DMOs face the problem of reaching out to potential visitors. Differentiation as a tool to be competitive has become of greatest concern to DMOs, who often use the same marketing channels. However, destination branding is a complex process without a universal solution. The academic field of study touches upon several aspects of destination branding, but do not combine them. Destination branding is influenced by many stakeholders, such as tourists, politicians, local inhabitants and the tourism industry. To unite all these stakeholders under a common vision and goal is a complex task where not only marketing methods are the key to success. Several aspects such as infrastructure and political issues is hard for the DMOs to have an influence on, complicating the external environment. Many authors claim that a pre-requisite for successful destination branding is to know the destination and its stronger and weaker points. These can be used to develop strategies that have to be implemented through marketing methods. This is why marketing methods still are such an important part of the destination branding process.

To improve the marketing methods of DMOs, this thesis takes on the perspective of selected DMOs in three destinations to examine their destination branding methods. What can be learned from the marketing methods of DMOs in these cities? How can their
destination marketing improve and can general lessons for other DMOs be drawn from their experiences? Since destinations are unique, specific recommendations for the destinations as well as general recommendations for all DMOs will be made.

1.3 Purpose of study
The purpose of this thesis is to examine the current market position of Brussels, Istanbul and Stuttgart as tourist destinations and their marketing strategies and methods used to promote the destinations. We will identify general recommendations on how to improve the destination branding, and propose specific recommendations to selected DMOs in the destinations.

1.4 Delimitations
The thesis will only focus on selected DMOs in the cities of Brussels, Istanbul and Stuttgart. The perspective of tourists and stakeholders, such as tourist businesses or local inhabitants, will not be included. Since marketing and branding are vast areas, the thesis will only contain theories from the area of destination branding that are relevant when discussing and answering the research questions. The thesis will not contain an analysis of brochures, homepages or other promotional material, except for selected logotypes because they represent the DMO and the destination. The organizational structure of DMOs will not be emphasised as an important factor for improved destination branding and the focus is not to do anything else but suggest improvements in destination branding and add to the structure of recommending improvements. The thesis will not analyse the possible implementation of the suggested recommendations.

1.5 Research question
The main research question that will be answered in the thesis is:

• How can a DMO’s destination branding be improved in terms of strategies and methods?

The sub-questions that will help to answer the main question are:

• What are the destination branding strategies and methods used by selected DMOs in Brussels, Istanbul and Stuttgart and how can they be improved?

• What can be learned from the destination branding strategies and methods used by selected DMOs in Brussels, Istanbul and Stuttgart?

1.6 Chapter overview
This list gives the reader an idea of what is to come in the thesis.

1. The Introduction presents the background of the thesis, the purpose of study and a discussion of the research problem leading up to the research question.

2. In Methodology, the research approach to the subject is presented in addition to the methods used in finding relevant theories and acquiring empirical data. Furthermore, the choice of primary and secondary sources will be presented and evaluated. The processing of the data including errors, validity and reliability will also be presented.

3. In Theoretical Framework, theoretical ideas and concepts within the area of destination branding will be described. Concepts are defined as to give the reader an idea of the perspective used in the work, especially as certain concepts can mean different things to different readers and
contexts. Important theoretical models that will be applied in the analysis of the empirical findings will also be defined.

4. In **Empirical findings**, the three different destinations that are the foundation of the case studies will be presented. Information retrieved from interviews will be mixed with other sources of data to provide the reader with an as accurate picture as possible about the destination branding in Brussels, Istanbul and Stuttgart. In order to give the reader a more in-depth understanding of the pre-requisites of the three destinations, a brief introduction of Brussels, Istanbul and Stuttgart will be given. For the reader who is already familiar with the destination, the introduction in each section can be left out.

5. In **Analysis**, the empirical data will be examined in the light of presented theories and will focus on what can be learned from the case studies.

6. In **Conclusion**, the conclusions that have been made from the analysis and discussions will be presented. The aim of the conclusions is to reach an answer to the research question.

7. In **Suggestions for future research**, interesting themes within destination branding that we have come across are suggested for further exploration.

8. In **References**, a list of all research material, including books, articles, websites, interviewees and images will be presented.

9. In **Appendix**, the interview questions that were used as a basis for the interviews will be presented.
2 Methodology

In this chapter, the research approach to the subject is presented in addition to the methods used in finding relevant theories and acquiring empirical data. Furthermore, the choice of primary and secondary sources will be presented and evaluated. The processing of the data including errors, validity and reliability will also be presented.

2.1 Research approach
Research approach explains the pre-requisites that lead up to the choice of thesis subject and how it was approached.

2.1.1 Background
Due to internships and studies, the authors of the thesis lived in Brussels, Istanbul and Stuttgart for various periods between January and June in 2009. Therefore, the choice of cities was obvious and formed the approach to the subject. These destinations are interesting because of their different sizes, characteristics and locations. Brussels is a political city in Western Europe, Istanbul is a regional financial center with one foot in Europe and one foot in Asia and Stuttgart is a high-profiled city in technical industry in Central Europe. The characteristics of the cities, the sizes of the cities and number of tourists, along with financial resources and organizational resources, are some factors that will determine the focus in the DMOs’ destination branding strategies and methods. By looking at cities of different sizes and characteristics, we will use examples from a broad spectrum of destination branding methods, so the results of the thesis will hold for all types of destinations.

Our interviewees have been chosen to give a broad view on marketing methods at different levels in different organizations. All interviewees are employees in higher administrative positions within the field of marketing in the respective DMOs. Several of them have worked in the business for many years. Some interviewees also recommended us to other interviewees. For example, Balç Fisunoğlu at ICVB referred us to Demirel at the MoT’s head office in Ankara.

One author worked as an intern at the Rezidor Hotel Group in Brussels and one author worked as an intern at the Swedish Trade Council in Istanbul. Through these internships, important contacts could be made and referred to the other authors of the thesis. For instance, key people within the Radisson Blu Hotel chain (part of the Rezidor Hotel Group) could be contacted regarding their marketing activities and business development in the respective destinations. The initial purpose was to include different stakeholders in destination marketing, however this was later excluded due to the scope of the essay and thus the delimitations that had to be made. Some information was kept, however, due to important comments made about destination marketing.

2.1.2 Research perspective
We conducted an empirical study where the results have carried the research forward. This makes the thesis an inductive study. In an inductive approach, the research produces the theory. In other words, you infer generalizations from the research (Bryman and Bell 2007). In this case, examples from Brussels, Istanbul and Stuttgart will be used to compare and analyze marketing concepts and what one should think about when marketing a city as a destination. According to Jacobsen, the ideal of the inductive research approach would be to go out and collect data without having any preconceived notions and to analyze the information (Jacobsen 2009). However, this thesis will be
based on an iterative strategy, which means that theory and the findings are weaved back and forth (Bryman and Bell 2007). That is, the research will be analyzed in the light of academic theory to ensure that the findings have a theoretical significance.

2.1.3 Research design

To accurately describe the reality of destination marketing in the three different cities, a multiple-case study that highlights the unique contexts in each city has been conducted. Critics of such an approach say that the researcher may not pay enough attention to the unique context but might focus more on contrasts between the case studies, which may lead to a subjective focus from the start of the research. Indeed, it may be hard to focus enough on the unique contexts due to the scope of this thesis. However, the contrasts are interesting in the way that examples probably will infer recommendations that not only hold for one type of destination.

The research design is also cross-cultural, since data will be collected from three different countries. According to Bryman and Bell (2007), cross-cultural research usually compares the national management systems and local business customs in various countries (Bryman and Bell 2007, p. 67). In this case, the strategies and structures of DMOs in three different countries will be used for the purpose of this thesis. Cross-cultural research tends to hold culture as a major explanatory variable on behaviour (Bryman and Bell 2007), which in this thesis is unavoidable since destination marketing is something that originates from the settings of the city to be marketed.

2.2 Data collection

Data was collected through primary sources and secondary sources, where primary sources were prominent. Therefore, a large part will describe the selection of interviewees, the interview techniques used and problems that are associated with this interview approach.

2.2.1 Primary sources

The primary sources consist of interviews with employees in higher administrative positions in selected DMOs. The main purpose of having several interviews was to cover a broad spectrum of how DMOs work when promoting their destinations, but also in order to make sure the information provided was reliable. The interviews also made it possible to come closer to the core of the destination marketing knowledge: the destination branding practitioners in DMOs. Because of this, a deeper analysis of the destination branding concepts could be made in order to obtain an answer to the research questions of this thesis.

It is important to reflect the fact that the methods of destination marketing differ across DMOs, because factors such as background experience and the pre-requisites of the city to be marketed are bound to influence the interview questions and show destination branding in different destination contexts. Using a standardized survey as an interview method would not have reflected this. Other methods, such as group discussions, would have been too costly, time-consuming and difficult to set up – in some cases it was even hard to get one person from the organisation to participate in an interview.

Selection of DMOs

The DMOs were selected because they are the official marketing organisations with the purpose of promoting the chosen destinations in leisure and business tourism. These DMOs are thus the most important organizations in the destinations. After performing research about existing DMOs, initial contact with interviewees at the selected DMOs was made through e-mails or phone calls. These people were usually chosen because they had some higher administrative position at the DMO, which means that they have
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an overview as well as a lot of insight in the organisation and its marketing methods. The number of interviews has varied between the destinations, which is a result of different organisational structures in the DMOs (such as state-organized vs. independent DMOs), existence of specific marketing associations, number of DMOs promoting the city etc. Some interviews were more fruitful than others, therefore we had to conduct more interviews in some of the destinations. In some destinations such as Brussels it was difficult to schedule interviews, whereas it was easier in Istanbul.

Out of ten interviews, eight have been face-to-face interviews, whereas one has been a telephone interview. In one case, there was also an e-mail interview. Two other planned interviews could not take place. In the case of Brussels and Stuttgart, the interviewee was unavailable at the scheduled appointment. In Stuttgart, the interviewee was replaced with another who had access to the interview notes made by the first interviewee. The thesis will be send to the interviewees in order for them to work with the results in the DMOs. All interviewees that are represented in the thesis are listed in Table 1.

**Brussels**

<table>
<thead>
<tr>
<th>Interviewee</th>
<th>Job position and DMO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nijs, Wiemke</td>
<td>Ms. Wimke Nijs, within Monitoring and Trends at TF, was interviewed for the purpose of the thesis. Nijs works since four years for TF in the online marketing department and has a background as a business administrations and psychology university student.</td>
</tr>
<tr>
<td>Vrydagh, André</td>
<td>André Vrydagh, manager for city marketing and branding at BITC, was interviewed for this thesis. He has been working with the marketing of Brussels since it was decided 12 years ago that Brussels needed to have an organisation that promoted Brussels as a destination to potential visitors. Under his leadership the organisation has transformed from an over-the-counter information bureau towards a DMO. Vrydagh started with this project alone and today leads a team of people promoting Brussels. He has gained extensive knowledge in marketing during his 25 years in the industry, first with consumer goods, working for companies such as Kraft Foods and Colgate – Palmolive. (Vrydagh, personal interview)</td>
</tr>
</tbody>
</table>

**Istanbul**

<table>
<thead>
<tr>
<th>Interviewee</th>
<th>Job position and DMO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Balçi Fisunoğlu, Elif</td>
<td>Elif Balçi Fisunoğlu, director of marketing and sales at the ICVB was interviewed for the thesis. Balçi Fisunoğlu has been working for ICVB since 2001. Once writing her own thesis at the university, she also covered the field of destination marketing. (Balçi Fisunoğlu, personal interview)</td>
</tr>
<tr>
<td>Çelik, Abdulrahman</td>
<td>Abdulrahman Çelik is the assistant to the local president of the tourism office in Istanbul. Çelik compiles statistics of the tourism industry in Istanbul. He has worked at the</td>
</tr>
</tbody>
</table>
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Istanbul office for several years. (Abdulrahman Çelik, personal interview)

Demirel, Levent
Deputy general manager for the promotion department. Demirel has worked in the marketing business for 16 years. After getting his university degree in England, he worked as a general manager for 17 hotels.

The interview was joined by Onur Gözet and Asli Aksungur, Deputy general manager for the promotion department. Demirel has worked in the marketing business for 16 years. After getting his university degree in England, he worked as a general manager for 17 hotels. Onur Gözet and Asli Aksungur both have several years of experience within the field of marketing. Onur Gözet is responsible for foreign affairs in the department and Asli Aksungur works with promotion.

Rydin, Ian
General manager, Radisson Blu Bosphorus Hotel
Istanbul, Turkey. Rydin has been working in the Radisson Blu hotel chain since 2000 and his previous positions include working as an Operations Manager and Director of Future Openings. He has been the General Manager at the Radisson Blu Bosphorus Hotel for 1.5 years. (Rydin, personal interview)

Taş, İlkay
Assistant to manager, Turkish Tourism Bureau Stockholm
Stockholm, Sweden. Taş has worked at the office for 15 years and has long experience within the field of marketing Istanbul and Turkey

<table>
<thead>
<tr>
<th>Interviewee</th>
<th>Job position and DMO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interviewee 1</td>
<td>The first interviewee at Stuttgart Marketing GmbH wished to be anonymous and will be referred to as “Interviewee 1, Stuttgart” throughout the essay, or “Interviewee 1, Stuttgart” where clarification is needed.</td>
</tr>
<tr>
<td>Interviewee 2</td>
<td>The second interviewee at Stuttgart Marketing GmbH also wished to be anonymous and will be referred to as “Interviewee 2” throughout the essay, or “Interviewee 2, Stuttgart” where clarification is needed.</td>
</tr>
<tr>
<td>Niestert, Dorothea</td>
<td>Dorothea Niestert is a managing director at Magic Cities e.V. The DMO only has one office, located in Frankfurt, with Niestert as the only employee. Her work tasks include promoting the partner cities overseas such as USA, Canada, Japan, China, India, Korea and Australia. (Niestert, e-mail interview)</td>
</tr>
</tbody>
</table>

Table 1 - List of interviewees

Interview approach
To acquire the necessary empirical information, semi-structured interviews were carried out with the interviewees at selected DMOs. The interviewee was given some specific themes to discuss but was apart from that free to form the answers in their own way (as mentioned in Bryman and Bell 2007). In the interview process, the interview questions were not strictly followed; rather they were used as a basis for the discussion, in order to increase the comparability between the interviews. The questions were open, which left space for the interviewee to discuss around the provided themes. In order to cover all the interview questions, the interviewers partly controlled the direction of the
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Interview. Sometimes, the interviewer asked additional questions to follow up on interesting thoughts by the interviewee. This interview process is flexible and takes into account what emphasis the interviewee sees as important for the discussion (Bryman and Bell 2007). When a meeting had been set up, the interview questions were sent to the interviewee to give him or her an opportunity to prepare himself or herself.

The advantage of an open face-to-face interview is that people tend to find it easier to talk about sensitive subjects during such interviews, since a personal relationship is established between the interviewer and the interviewee. Investigations show that the absence of personal contact during an interview may make it easier for the person being interviewed to lie or modify the truth. (mentioned in Jacobsen 2009, Bryman & Bell 2007) Moreover, the interviewer had the possibility to observe the body language of the interviewee in the face-to-face interviews, and could thus adapt to the situation if the person seemed to not understand the question. (as mentioned in Bryman & Bell, 2007)

The number of telephone or e-mail interviews has therefore been kept to a minimum, but due to distance problems or lack of time of the interviewee, some of the interviews had to be conducted through other ways of communication. During the interviews we realised that the chemistry created by the interaction with the interviewee and the atmosphere during the interview also might have an effect on the interviewer’s perception of the interview. These factors might have affected the interviewer’s objectivity and the way the answers have been presented in this thesis. The interviews were usually recorded and transcribed afterwards to make sure that the information was accurate when presented in the thesis. This was also done in order to avoid misunderstandings and errors related to the interviewer’s memory, since each author of the thesis performed the interviews about their respective destination on their own. By analysing the recordings together, the authors of the thesis have kept personal interpretations to a minimum. In some cases, however, recording the interview was not possible due to the interviewee being uncomfortable about this. Therefore, notes were taken instead.

Conducting the interviews
To prepare for the interviews and make sure that the information acquired would be as valid and reliable as possible, the interviewers used Kvale’s list with recommendations to the interviewer. These include conducting research on the organisation on beforehand to have knowledge about the organisation and the person being interviewed. Furthermore, Kvale mentions the importance of structure, legibility, sensitivity towards the interviewee and having a critical approach. (Kvale 1996) The interviewers followed an interview scheme to have a structure in the interview. Furthermore, we tried to be critically aware during the interviews while still being sensitive and aware of the atmosphere to make sure that the interviewee was comfortable in the interview situation.

Most interviews were conducted in English, one interview was conducted in Turkish and two interviews were conducted in German. The interview conducted in Turkish was made with an interpreter available. To some extent, this disturbed the flow of the interview. To ensure that the information from the interview would be accurately presented, the interpreter transcribed the recording afterwards. The flexibility of the interview as a way of collecting primary data makes this form of information collection very attractive (Bryman and Bell 2007).

The interviewees usually requested that the personal interviews should be conducted in their offices, since it was a natural place for them to discuss their work. Most interviewees were well prepared and followed the structure of the interview scheme.
Many interviewees had a long experience within destination marketing and shared this with the interviewer. An informal atmosphere and a friendly relationship between the interviewer and the interviewee generally characterized the interviews. In some cases, such as the interview with Interviewee 2 at Stuttgart Marketing GmbH, the interviewee did not have enough knowledge to answer all the questions. Therefore, a supplementary interview was conducted with another employee at the DMO to confirm Interviewee 2’s answers to the interview questions and to answer the rest of the questions.

Some interviews were interrupted, for example with Demirel at the Ministry of Culture and Tourism (MoT), who invited two other employees to take part in the interview. This caused some disturbance as these people entered one by one at different times, which made it harder to follow the interview agenda. However, the interviewees were relaxed and a friendly atmosphere was created. Another disturbance occurred during the interview with Interviewee 1 at Stuttgart Marketing GmbH. The interview was supposed to be conducted with another sales manager, who was too busy to participate in an interview. Therefore, Interviewee 1 stepped in and used the notes of the other person and her own experience to answer the questions. Since this was a supplementary interview, it was also kept much shorter than other interviews. The average interview time was approximately 60 minutes.

2.2.2 Secondary sources
The secondary sources include Internet pages, brochures, books, statistics and advertisements. This information is up-to-date and specifically targeted at this field of research. Many reports have been conducted by DMOs, which have access to first hand information and rare inside knowledge of the organisations and their marketing strategies. Statistics by the DMOs and the statistical bureaus are also included in the thesis. Furthermore, the statistical information was double-checked with the World Economic Forum, which is an independent organization with no interest in misrepresenting data.

2.2.3 Choice of literature
When finding theoretical concepts and models, the authors of the thesis accessed generally limited access to university libraries, which made Internet an important part of the work. Academic articles for theoretical information were usually found through article databases, such as EBSCOhost and Business Source Premier, through the Linköping University library's home page. The advantage of these articles are that they are up-to-date, specifically targeted at this field of research and offer a more extensive range of case studies, studies among practitioners etc. This is not usually presented in published literature, which often focuses on the hospitality industry or travel agent industry. Generally, books about destination branding were also easier to find in online databases, such as GoogleBooks. However, these books were often a preview rather than a full version. Other kinds of secondary data that have been used are various studies made by research institutes or DMOs, which will be presented in Empirical Findings.

2.3 Research limitations
Conducting a study within a constrained time frame certainly provides room for errors and limitations in the research. This part presents errors on the authors’ part as well as their view on the validity and reliability of the work. The goal is to provide the reader with a greater insight in the research methods chosen and conclusions reached.

2.3.1 Errors
The interviews were performed at different stages in the writing process; some were conducted already in the beginning, whereas some were made towards the end of the writing process. Hence, the authors’ understanding of the subject were different at
these stages, which makes it possible that interviews made in the beginning of the writing process were not as in-depth as they could have been. For example, the interviewer had a more limited knowledge of the subject in the beginning and had little experience from previous interviews etc. In the interviews that were made towards the end of the writing process, questions could be more specific or asked in a different way because of an increased understanding of the subject. On the other hand, the same basic questions have always been used for the interviews and without making any mistakes, there would not have been any learning process for the later interviews. This learning process included learning to elaborate more on interview discussions, e.g. asking more specific questions about a certain area of destination branding in the DMO.

Other problems that arose during the data collection are that the same data are not always available for the three cities. A major reason for this is that Istanbul and Brussels are big and international cities, whereas Stuttgart is generally not as well known. Performing research in three different destinations can prove to be difficult, but living in the different cities has eased the research process. During the process of collecting empirical data, emphasis has been put on finding comparable data for the destinations. This has in some cases proven difficult to find, however most of the statistics have been comparable. In some cases, similar quantitative measures could be used, such as over-night stays, as a measure of success in attracting tourists.

2.3.2 Validity and reliability
The destinations that have been examined contain relatively few DMOs and we have selected the most important DMOs for interviews. Therefore, we are of the opinion that the results are credible and accurately represent the work of the destinations’ DMOs. Since every destination is unique every DMO needs to consider whether the recommendations are suitable for their destinations or not. However, we maintain that our recommendations are applicable on most destinations. In order to conduct a reliable study, several interviewees have confirmed the information used and written information has often been confirmed by renowned authors within the area of destination marketing such as Anholt, Pike, Buhalis and King. The written information can easily be verified through various instances, such as the public, and has been critically scrutinized. Moreover, the qualitative approach of the research made it difficult to make data completely comparable. In order to avoid the problem of comparability, specific discussion questions were used as a basis for the interviews.

Everything from the people you meet to the experiences you make in the destination will influence how the destination is perceived. These feelings and impressions have influenced the way in which we perceive the destinations. Since we have lived in different places, we have not experienced life in all three destinations, which undoubtedly would have given us an increased understanding of the destinations. This was clearly shown when we discussed the destinations together and realized that the perceptions were different.

As Swedish authors of the thesis, we have probably viewed the destinations and its cultures through a Swedish perspective. What might be normal to local inhabitants can sometimes seem strange for a foreigner. By knowing the language and culture, it would have been easier to understand the destinations. Meanwhile, it was positive not to know too much about the destination on beforehand in order to be more objective. In the end, the interviews with DMOs have influenced and formed our perception of the destinations, marketing strategies and methods. In most cases, DMOs were positive and sold the destinations to us as interviewers and it has sometimes been difficult to keep a distance from reality and your own perception.
3 Theoretical framework

In this chapter, theoretical ideas and concepts within the area of destination branding will be described. Concepts are defined as to give the reader an idea of the perspective used in the work, especially as certain concepts can mean different things to different readers and contexts. Important theoretical models that will be applied in the analysis of the empirical findings will also be defined.

3.1 Defining basic concepts
The concepts that will be described here are: Destination, Destination branding, Destination brand, Tourism and Destination image. It is important to describe these as concepts can mean different things depending on the reader and the context.

3.1.1 Destination
Also the word destination can have different meanings depending on the context. For example, a macro-destination such as France can have several micro-destinations; Ile-de-France, Paris, Eiffel Tower in Paris (Kotler et al 2003). Destinations are places with some actual or perceived boundary, e.g. political and physical boundaries (Kotler et al 2003).

3.1.2 Destination branding
Express train connections and low cost direct flights to all corners of the world have changed the tourism industry in recent years, making travelling much cheaper, more accessible and less time-consuming than it used to be in the past. This globalization has led to a greater need for destinations to differentiate themselves from the competitors in order to attract tourists. The concept of destination branding originates from product marketing but has grown into its own field of research as researchers have realized that marketing a destination is different to marketing a product. Most tourism products are intangible services rather than physical goods, that is, you cannot see or touch the service before you buy it. (Cai 2002, De Chernatony and Riley 1999, Morgan et al 2002) Therefore, these products rely heavily on image and reputation (Pike 2008). In the case of destinations, already the name of the brand is fixed by the actual geographical name of the place (Cai 2002). Consumers buy tourism and services with knowledge only about prices, some image of the destination and their own or friends’ earlier experiences. (Weaver and Lawton 2001)

Destination branding is a set of marketing activities that differentiates the destination from other destinations. It involves conveying an expectation of a travel experience that is only associated with this destination. Practitioners within destination brand management find it hard to develop a one-brand positioning theme as destinations are manifold. This can be seen as a contrast to the marketing of products that are already designed to suit market needs. (Pike 2008) A destination must further provide overall attractiveness and quality experiences that are equal or better than those of the alternative destinations for its target markets (Dimance 2005). As a consequence of the above, destination or place branding has become increasingly important for the destination and its stakeholders to increase the economic benefit (Blain et al 2005). As Anholt puts it: “Unless a place can come to stand for something, it stands little chance of being remembered for long enough to compete for any of this precious attention.” (Anholt 2003 p. 214)
Furthermore, the DMO must know the needs and wants of customers, both actual and potential, to accurately serve them because trying to attract all travellers would be a waste of money (Kotler et al 1993). It should consolidate and reinforce the emotional relation between the destination and the visitor (Pike 2008, Hannam 2004). Moreover, it should help to reduce consumer search costs and perceived risk (Pike 2008). The aim should be to create an opinion of the destination in the potential tourist’s mind, make the tourist link the destination to an image, project clear expectations and a concept of quality (Stolpmann 2007). However, to promote a destination is not only to create attention around the destination, but also to persuade people to actually travel to the destination (Pike 2008). This is difficult since the choice of a destination is influenced by a large amount of unpredictable human factors, such as moods and expectations (Weaver & Lawton 2001). These unpredictable factors can however be influenced by stakeholders such as DMOs, hotels, airlines and travel agents, just to name a few. These stakeholders often have conflicting interests, making it more difficult to market a destination than a product (van Ham 2008, Pike 2008). As an example, there are local tourism businesses with different interests who want their own product or service to be featured. (Pike 2008) For tourists, the destination can be seen as an integrated experience rather than different services provided by different stakeholders. Therefore, it is important that the stakeholders coordinate their marketing activities and treat the destination and the services provided as one entity (Elbe et al 2009), since the core objective of destination marketing is to produce a consistent, focused marketing strategy (Hall 1999).

DMOs are increasingly using branding initiatives such as the use of logotypes and slogans to aid the development of a successful marketing strategy. These should ultimately support and strengthen the image that the DMOs want to convey. Logotypes and slogans are used to increase awareness and recognition among potential tourists. Capturing the wide range of attractions, the people, the climate and the various activities in around seven words for a brand slogan can, however, prove to be difficult (Pike 2008). Blain et al (2005) stresses the great importance a logotype and a slogan have to the building of a strong destination brand. The use of the above can ultimately lead to a competitive advantage over other destinations with weaker brands and slogans. This advantage is particularly important before the visitors visit the destination, in order to catch the tourist’s attention and interest. (Blain et al 2005)

From the information above, we can conclude that destination branding and the activities involved are complex processes influenced by many factors and that this is an area of research that needs to be studied more.

### 3.1.3 Destination brand

In order to distinguish between the concepts Destination branding and Destination brand, the latter concept will hereby be defined: the activities performed in destination branding are to develop the destination brand. The role of a brand is to identify the goods or services and to differentiate these from its competitors. (Blain et al 2005)

### 3.1.4 Destination Marketing Organisations (DMOs)

The abbreviation DMO stands for Destination marketing organisation. DMOs work with promoting destinations to potential visitors with the goal to bring economic benefit to the community (Blain et al 2005). A DMO can be in charge of destinations on different levels, from cities to nations. The major purpose of DMOs is to market and manage the destination to potential visitors in order to provide economic benefit to the community. DMOs can form partnerships with the private and public sector, usually in hospitality and tourism-related sectors to better reach the customers. Examples of partners include restaurants, hotels, governments, tour operators etc. (Blain et al 2005) A DMO should also ensure the long-term development of a destination. This is usually done with a focus
on convention sales, tourism marketing and service for the tourist.
(www.destinationmarketing.org) DMOs are often created by public agencies, e.g. a
government, and financed by public means. Sometimes this is done in combination with
private funding. (Elbe et al 2009)

3.1.5 Tourism
The word tourism can have many meanings depending on the context. There is health
tourism (mineral spas, plastic surgery, dental tourism), sport tourism (playing golf in
Scotland), city tourism (shopping in New York) or landscape tourism (visiting a natural
reserve in Sweden). The concept used in the thesis will define tourism as the activities
and interactions of people who do not regularly work or live in the destination, which
have an effect on the demand and supply sides of the destination's economy (Pike 2008).

3.1.6 Destination image
A destination image consists of the associations with a destination and can give an idea
of why people would want to visit the destination (Kotler et al 1993). Since destinations
are intangible products, they rely heavily on their image to attract tourists. Strong
elements that characterize the destination are used to develop a destination image.
These should be representative of the place, and position the benefits of the place and
communicate benefits of the destination to the target groups. (Day et al 2002) A tourist
who has never been to the destination before can only rely on his or her perception of
the image rather than the actual features of the destination. Research shows that if
visitors have a positive image of a destination, they are more likely to visit the
destination (Tasci and Gartner 2007). Therefore, it is important that the destination
image or marketing is related to a true destination identity (Govers et al 2007). It is
important that unrealistic expectations are not created, as this may hurt the image of
the destination in the long run (Tasci and Gartner 2007). Moreover, the image can affect
everything from business, trade, diplomatic and cultural relations with other
destinations (www.gfkamerica.com).

DMOs can influence the destination image through brochures, pictures, the Internet
etc. However, a destination image is also heavily influenced by external factors such as
media, popular culture, biases, history, assumptions, preconceptions, prejudices, and
factual stories. Therefore, the image might also be negative or simply out-of-date
(Anholt 2003). In general, it is important to try to control the informational flow about a
destination. For example, public media are often said to be very influential on image
formation because they have a high credibility and an ability to reach mass crowds
better than destination-originated information from DMOs. Because of the bigger
impact from these agents, destination authorities try to improve and enhance their
image by getting positive attention in the media. The destination image can be changed
quickly if the information received is considered credible and differs substantially from
previously held images, or gradually if the information is less overwhelming for the
receiver. (Tasci and Gartner 2007)

It is important that parts like private and public companies, media, popular culture,
educational materials create a common image of the destination. However, negative
information about a destination sometimes comes forward. This can be due to terror
attacks, increased crime rates, etc. In these cases, a destination can counter negative
information by using marketing channels such as word-of-mouth by satisfied visitors. A
close cooperation with travel journalists in an effort to utilize a strategic advertising
tool, namely positive testimony of known people, helps the process of creating a positive
image of the destination (Tasci and Gartner 2007).
3.2 The Tourist Area Life Cycle model

The Tourist Area Life Cycle (TALC) describes how destinations develop over time (Boniface and Cooper 2005). The concept, based on the product life cycle model in marketing theory, is considered to be a significant concept in strategic destination marketing and planning. It describes how a destination is introduced on the market and how it acquires and maintains market share as the number of tourists in the destination grows. (Hall and Page 2005) The TALC model describes six stages in the development of a tourist resort: exploration, involvement, development, consolidation, stagnation and decline or rejuvenation, and plots the number of tourists over time. A destination normally goes through the different stages of the model. However, the model is not static, therefore it is not certain in which stage the destination currently is situated. To give an overview, the model is shown in Figure 1 and a description of the different stages will be given below. The TALC model will be used in the thesis to describe the stage in which Brussels, Istanbul and Stuttgart are to be found in order to understand the starting point of the destination, its DMOs, and how it may influence their marketing methods and the challenges that lie ahead.

**Figure 1 - The Tourist Area Life Cycle model (Putra and Hitchcock 2006)**

In the first stage *Exploration* the resort has unspoilt nature or cultural features. The number of tourists is small, and these are considered as adventurous travellers. There are no specific tourist facilities in the destination. *Involvement* means that there are more tourists, a tourist season, some advertising, and tourist facilities have been developed by local initiatives and involvement from the public sector. In the *Development* stage, the number of tourists grows. National or international (external) companies begin to provide more up-to-date facilities in comparison to local companies. The appearance of the destination starts to change and there is a risk of possible overuse. *Consolidation* means that the destination is part of the tourist industry and that the rate of increase of visitors is declining. There is an emerged recreational business district noticeable. The *Stagnation* stage occurs when the peak of visitor numbers has been reached. The destination is unfashionable with environmental, social and economic problems. Major promotional efforts are needed to maintain visitor numbers. When a destination has entered the *Decline* stage, it means that visitors have started to visit newer, rural resorts instead. The destination is dependent on a smaller geographical catchment and repeat visits. *Rejuvenation* is an attempt to re-launch the destination by providing new facilities, attracting new markets and re-investing.

It is important to note that the curve is not static, but dynamic. With some planning, the curve may be revised. Still, the curve also shows what happens when there is a lack of management and control and the destination enters the *Decline* stage. (Putra and Hitchcock 2006)
3.3 Destination competitiveness

The concepts of comparative and competitive advantages are important when discussing the marketing of sustainable destinations and it is important to know the advantages of the destination in order to market it properly. The concepts will be explained below and summarized in Table 2.

A **comparative advantage** is the climate and scenery of a destination (Paskaleva-Shapira 2007). It can also be cultural resources, human resources and goodwill resources (Pike 2008). This is also highlighted by Ritchie and Crouch (2003) who mention human resources, physical resources, knowledge resources, capital, infrastructure, historical and cultural resources as factors contributing to a destination’s comparative advantage.

A **competitive advantage** is a value-added activity by stakeholders (Paskaleva-Shapira 2007). These competitive advantages can also be named as assets and skills. An asset is a resource, which is better than those of the competitors, whereas a skill is an activity, which is undertaken better than those of the competitors. Assets can be the financial resources, legal resources, organisational resources, relationship resources etc. A destination can have competitive advantages in architecture, museums and galleries, different culture, level of technology, political stability etc. (Enright and Newton 2005)

Creating partnerships between the private and the public sectors is one way of becoming more competitive (Pike 2008), along with differentiation to different target groups (Paskaleva-Shapira 2007).

<table>
<thead>
<tr>
<th>Comparative advantage</th>
<th>Natural resources, such as climate and scenery</th>
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<tr>
<td></td>
<td>Cultural resources</td>
</tr>
<tr>
<td></td>
<td>Human resources etc.</td>
</tr>
<tr>
<td>Competitive advantage</td>
<td>A value-added activity</td>
</tr>
<tr>
<td></td>
<td>e.g. financial resources, legal resources, organisational resources, infrastructure etc.</td>
</tr>
</tbody>
</table>

Table 2 - Comparative and competitive advantage (Paskaleva-Shapira 2007, Pike 2008)

According to Ritchie and Crouch (2003), a destination’s development of tourism must be sustainable in several ways: economically, socially, culturally, politically and ecologically. The long-term economic prosperity is the goal for the destination. Although some destinations might be economically underdeveloped and politically unstable, people still visit them simply because they offer an experience that cannot be found anywhere else. According to Paskaleva-Shapira (2007), the destination is successful when the destination is more than a place to stay, but also a place where people want to live. However, in order to say that something is competitive, it is first needed to specify the goals towards which the competitiveness is directed. (Ritchie and Crouch 2003)

A destination is competitive when it can provide a higher quality of goods and services than its competitors. Being competitive is also about combining the comparative and competitive advantages of the destination. (Paskaleva-Shapira 2007) To achieve competitiveness, it requires integrated destination management perspectives including the organisation, marketing, policy and planning, human capital and environmental management (Ritchie and Crouch 2003, Dwyer and Kim 2003). Paskaleva-Shapira (2007) argues that competitiveness is achieved through the ability and capacity to provide rich tourism offers, infrastructure and overall attractiveness that not only benefits visitors, but also business and citizens. This ability and capacity is achieved through effective organization and governance of destination management that
enhances the resources of the destination and improves its situational conditions. (Paskaleva-Shapira 2007) Moreover, Knox and Bickerton (2000) emphasize the importance of not only understanding the current identity through image and culture, but also the future vision, to provide the foundation of a future competitive brand.

The integrative model by Ritchie and Crouch (2003) describes the various factors that are important in order for a destination to become competitive and sustainable and is shown in Figure 2. The model will be applied on the destinations to evaluate what stage the destinations are in and what DMOs need to do in order to develop further to be a competitive destination. The model starts at the bottom with Supporting factors and resources because these are the basis for building destination competitiveness and continues with Core resources and attractors, Destination Management, Destination policy, planning and development and ends with Qualifying and amplifying determinants. This is shown in Figure 2.

Figure 2 – Ritchie and Crouch’s integrative model (Ritchie and Crouch 2003)

Supporting factors and resources involves the infrastructure, hospitality, enterprise and political will etc. Core resources and attractors are the destination’s climate, culture and history, mix of activities, special events and entertainment etc. Destination management consists of factors that enhance the appeal of core resources and attractors, strengthen their quality and effectiveness and best adapt to situational conditions. These factors include organisation, marketing, quality of service/experience, finance and venture capital, human resource development and crisis management. Destination policy, planning and development include the philosophy of the destination, its vision, a competitive and collaborative analysis of the destination and its monitoring and evaluation. Examples of qualifying and amplifying determinants are the location of the destination, safety/security, cost/value, interdependencies, awareness/image. Having these factors can increase the impact of the other factors, e.g. amplifying the effect of destination development, hence making the destination more competitive. (Ritchie and Crouch 2003)

It is important to emphasize that the model should not be interpreted as a hierarchy - a destination can be more or less competitive depending on to what extent the different factors are fulfilled. For example, although the destination has competitive core factors, a lack of well-developed policies or mismanagement can decrease the competitiveness of the destination.
3.4 Best practice according to the literature

Since the purpose of the thesis is to infer recommendations on destination branding, it was also important to look at what other authors have written about successful destination branding. Therefore, this part of the theoretical frame of reference will also be combined with the empirical data in the analysis to draw conclusions about this. Proper methods of destination development are required to be successful. Without this, destination management and efficient and effective DMOs are redundant. (www.unwto.org)

Consumers are increasingly travelling with recreational and educational motives. Therefore, Buhalis maintains that it is important to provide innovative and coordinated tourism products. For example, DMOs can promote certain destination themes. The perception of these will influence the future of the destination (Buhalis 1999). Travellers are becoming more sophisticated, experienced and demanding, which makes it important to raise the quality of tourism product in general and be more competitive globally (Buhalis 1999, Blain et al. 2005). This is another reason for DMOs to co-operate with local stakeholders. Co-operation between the private and public sector is crucial in developing proper methods of destination marketing (www.unwto.org, Buhalis 1999). In fact, it is vital that the suppliers and local distributors do not compete with each other. (Buhalis 1999) As Anholt (2008) puts it, progress is made easier by uniting groups of people around a common strategic vision. DMOs need to take stakeholders into consideration and help them to achieve their strategic objectives. (Buhalis 1999)

Moreover, the ultimate success of a destination branding strategy depends on an effective extension of the core brand, which comes into existence through effective relationships with stakeholders. These relationships reinforces the brand through consistent communication and delivery of services (Hankinson 2004). Co-operation between competing and complementary destinations can help regions to learn from each other and to adapt to demand requirements. (Buhalis 1999)

Furthermore, differentiation is of great importance when creating a strong destination brand image where consistency needs to be created with a uniform image with clearly identified brand values (King 2002), messages and experiences to visitors. This should provide assurance of quality, reduce perceived risk (Blain et al. 2005) and create a strong relationship with the consumer (Anholt 2008, www.unwto.org). A well-defined image that is accurately conveyed to visitors creates recognition and awareness of the destination brand (Blain et al. 2005). Sometimes, the development of a destination's brand image can be impeded or aided by its history, culture and heritage. This gives the destination a reputation, which is an external and cultural phenomenon that cannot be directly controlled by the owner of the brand. A reputation can make it even harder to change or influence the image of the destination and to successfully respond to the needs of local stakeholders. (Buhalis 1999) The DMO must remember that reputation is a very valuable asset, which has to be managed, measured, protected and nurtured over the long run (Anholt 2008).

King (2002) recommends DMOs to have a more direct engagement with the customer. Anholt agrees and says that places must engage with the outside world in a clear, coordinated and communicative way if they are to influence public opinion (2008, p. 3). In a survey made by Blain et al. (2005) about the perception of what destination branding is and how to do it successfully, DMOs also mention the importance of open communication between destination, DMO and visitors when creating an image of the destination.
Furthermore, King (2002) mentions the development of mass customization marketing and delivery capabilities. However, mass customization does not exclude the communication with the individual tourist. According to Buhalís (1999), many destinations make the mistake of thinking that the higher the number of tourists, the more the destination will benefit. However, the past has proven that destinations can be over-exploited. DMOs should rather develop a marketing strategy that is more comprehensive and identify appropriate target markets to maximize economic benefits locally without jeopardising local resources. If one does not select target groups carefully, it can destroy the indigenous culture of destination and thereby one of the key features of the brand (Ward 1998). As Buhalís (1999) puts it, suitable offers should be developed for the specific target group. This strategy should help DMOs to convey their message more effectively.

It is important to perform market research to keep up with market demands and to know the needs of consumers. Providing the visitors with satisfying, memorable experiences makes a destination competitive. (Ritchie and Crouch 2003) However, to understand tourism demand, DMOs should analyze the characteristics of visitors (Kerimoglu and Ciraci 2006). Overall, however, more emphasis is needed on the creation and promotion of holiday experiences, which link key brand values and assets like climate, culture, food, wine etc. (King 2002). At the same time, Buhalís (1999) mentions the difficulty of classifying and segmenting visitors since leisure and business tourism coincides more and more.

Taking advantage of new technology and the Internet is crucial since it is efficient and often less expensive than conventional methods. Furthermore, it allows the destination to co-ordinate the entire range of products and services locally and then to promote them worldwide. (Buhalís 1999) A change in the relatively passive promotional role is needed to include greater intervention in the conversation process. The existence of Internet has made it possible to reach out to more people. However, King (2002) maintains that web pages of shareholders and tour operators usually talks about hardware, like airlines and hotels, rather than experiences and benefits. It is important for the DMO to remember that vacations are more holistic experiences rather than simple purchases. Since visitors spend substantial amounts of money and time in the travel experience, it is mandatory to create an emotional relation between the visitor and the destination. If relationships with negative emotions are created, it is impossible to get neither loyal visitors nor positive word-of-mouth communication.

Anholt (2008) mentions the importance of sustained and coherent innovation in all sectors of national activity if public opinion is to be influenced. This is supported by Kahn (2006) who maintains that branding is not about marketing, but reforming the product, i.e. the destination. This usually has to be done on a political level, since it is about infrastructure, reducing poverty etc. (Kahn 2006) This is also emphasised by Ritchie and Crouch (2003) who maintain that ensuring the well-being of destination’s residents and preserving the natural capital of the destination for future generations are crucial for a destination to be competitive. The ability to provide this tourism product can be helped through the training of human resources in all sectors of the destination.

According to Hankinson (2004), successful destination branding consists of a combination of imaginative marketing and investments in key services and facilities that are required to provide a tourism product. If one does not invest in the brand, there will be no reinforcement of the core brand values and no repeat consumption.
4 Empirical findings

This chapter will present the three different destinations that are the foundation of the case studies. Information retrieved from interviews will be mixed with other sources of data to provide the reader with an as accurate picture as possible about the destination branding in Brussels, Istanbul and Stuttgart.

In order to give the reader a more in-depth understanding of the pre-requisites of the three destinations, a brief introduction of Brussels, Istanbul and Stuttgart will be given.

For the reader who is already familiar with the destination, the introduction in each section can be left out.

4.1 Brussels, Belgium

In Brussels, one thing is for certain, we speak every language and you meet every nationality here, in a friendly atmosphere that's still typical of Brussels and second to none.

(www.opt.be A)

4.1.1 Introduction

What do you know about Belgium and Brussels? Not much? Actually you probably do know about the tasty Belgian beer, the delicious chocolate and the famous comic strips such as Tintin and the Smurfs. (www.opt.be B and www.opt.be C) Belgium is a country situated in western Europe with 10.4 million inhabitants, neighbouring the Netherlands, Germany, France, Luxembourg and the UK. (www.cia.gov A) Becoming independent only in year 1830, Belgium was previously under the control of Spain, Austria, France and the Netherlands, which has contributed to the multinational environment and the variety of languages with the three official languages Dutch, French and German. (www.brusselsinternational.be A, www.opt.be B, www.cia.gov A). Political and cultural reasons have divided the country into three parts; Brussels, Wallonia and Flanders (Vlaanderen).

Brussels is the capital of Belgium with roughly 1 million inhabitants where 25% of the population is foreign (www.brusselsinternational.be A). One of the main reasons behind this is the high percentage of foreigners working for the NATO and EU institutions, which among other international companies and organisations are based in Brussels (www.visitbelgium.com). With so many people from different cultures living together the cultural and leisure activities are manifold. For example, Brussels hosts many festivals, such as chocolate, beer and jazz festivals. (www.opt.be C)

The St. Michael and St. Gudula Cathedral, Grand Place and the Royal Palace represent well-known buildings in Brussels. The EU-Parliament and the EU-Commission buildings can be found everywhere in the city, giving an idea of the importance that EU has for the city. Other landmarks include the Atomium, built for the World Exhibition in 1958. This impressive piece of architecture, which you can see on everything from souvenirs to tourist brochures, symbolizes an iron crystal magnified 165 billion times, with a height of 102 meters (www.atomium.be). From the top you can enjoy a fantastic view of the city. Another must-see when you visit Brussels is Manneken Pis, a small statue of a boy peeing, standing there since 1619. This statue has become one of Brussels’ most famous symbols. (www.opt.be D) Brussels is also well-known for its many museums and its culinary
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Highlights such as mussels and seafood with French fries and the famous Belgian waffles. (www.brusselsinternational.be B and www.opt.be C)

4.1.2 THE TOURISM INDUSTRY IN BRUSSELS

In 1996, Brussels had 2,200,000 guest nights, a figure that has increased to 4,100,000 guest nights per year in 2008. (Vrydag, personal interview) In 1997, the distribution between Recreational, MICE and Business visitors in Brussels were 34%, 24% and 42%. In year 2003 this had changed to 40%, 34% and 21% respectively. The biggest increase can be seen among MICE and recreational visitors, while business visitors had decreased to half the figures of 1997. MICE visitors are well familiarized with Brussels as a business destination. 60% of all meetings in Brussels are corporate meetings, compared with 25% of associations meetings and 15% international meetings. The trade fairs at Brussels Expo attract 2.5 million visitors every year. (www.brusselsinternational.be C)

Every year, the World Economic Forum ranks countries’ competitiveness in the travel and tourism sector. The report is used to evaluate and improve the growth and sustainability of the industry. In 2009 Belgium ranked 22 of the 133 countries included in the study. This is an improvement from place 27 in 2008. Belgium ranks well in environmental sustainability, ground transport infrastructure, human resources education and training, and cultural resources. On the other hand, Belgium ranks among the worst when it comes to price competitiveness and natural resources. (www.weforum.org) This is interesting since DMOs promoting Brussels claim that Brussels is a good-value-for-money destination (Vrydag, personal interview).

As can be seen in Table 3, 65% of the visitors to Brussels are people from Belgium and the neighbouring countries. Spain and Italy are also important markets. Smaller markets are Austria, Poland, Czech Republic, and the Scandinavian countries. (Vrydag, personal interview) For the Flanders region, which includes Brussels, 90% of the visitors come from the neighbouring countries. Brussels has been the main reason for the increase in bed-nights in the region over the last five years; it accounted for 27% of all foreign overnight-stays in Belgium in 2005. (La Group Leisure & Arts Consulting, 2006) Brussels plays a vital role in promoting the Flanders and Wallonian regions. Therefore, one could say that Brussels means more to Belgium than Belgium means to Brussels.

4.1.3 DMOs PROMOTING BRUSSELS

There are three DMOs promoting Brussels to potential tourists: Brussels International Tourism & Congress (BITC), Office de Promotion du Tourisme de Wallonie et de Bruxelles (OPT) and Toerisme Vlaanderen (TF). They are responsible for different regions and aimed at somewhat different target groups but with the common goal to sell the destination Brussels. BITC and TF have been interviewed for the purpose of this thesis. We also strived for an interview with OPT, however, they did not provide us an opportunity to meet with them.

Brussels International Tourism & Congress (BITC)

BITC is a private enterprise with the aim of selling Brussels as a destination. Their focus is to please the visitors and make them recommend Brussels as a destination. BITC’s mission is described as follows: Brussels has to create order in the proliferation of initiatives with its

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Table 3 - Top source destinations in Brussels (Vrydag, personal interview)
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best interests at heart. It has to build up a competitive coherence which creates a specific image based on the roots of its identity. (www.brusselsinternational.be D) BITC is working to draw interest to Brussels as a tourist destination by promoting a different image from the image shown in media, where Brussels often is mentioned in political contexts. This is achieved through the web and printed publications. BITC works with a broad range of organisations to make the guest feel welcome in Brussels. (www.brusselsinternational.be D)

Toerisme Vlaanderen (TF)
TF promotes Brussels and the Flemish part of the country. The main goal for the organisation is for the Flanders region to become a successful long-term tourism destination, improving the international competitiveness of the destination. The mission statement of the DMO is: … to promote tourism to and in Flanders and Brussels in a sustainable fashion, with the aim to create prosperity and welfare. (La Group Leisure & Arts Consulting, 2006 p.4) The organisation has its head office in Brussels and 14 offices in the main target markets abroad (Nijs, personal interview).

The goals for TF are reached by implementing a qualitative tourist policy to profile Flanders abroad to potential visitors. TF also has goals defined by the Flemish Cabinet. The Cabinet sometimes gives TF guidelines on what activities to do but the DMO still has a lot of freedom when it comes to what activities they should do. (Nijs, personal interview, La Group Leisure & Arts Consulting, 2006)

TF only works with the attention and awareness stages of the decision-making process. The rest is left to other organisations, such as travel companies, tour operators and travel agents. (La Group Leisure & Arts Consulting, 2006) The DMO works together with the tourism sector (hotels, restaurants, and other stakeholders) to improve marketing and the way in which they reach out to customers. This is done through conferences such as Flanders/Brussels Travel Forum where TF works to improve the image of the region and the relationships between the stakeholders and the potential visitors. (Nijs, personal interview)

4.1.4 Destination branding in Brussels
This coming section will discuss the way the selected DMOs are working in Brussels and the thoughts expressed by the interviewees.

The Unique Selling Points (USPs) of Brussels
In the official material from the three DMOs some USPs for Brussels as a destination are mentioned. The following USPs were discussed during the interviews.

- First and foremost Brussels is the capital of Europe. Major European institutions such as the European Union and NATO have headquarters located in Brussels, leading to worldwide recognition, a USP mentioned by all three DMOs. (www.meetingpointbelgium.be; Nijs and Vrydagh, personal interviews)

- Brussels is also mentioned as an international city, with more than 40 European and international organisations, 159 embassies and some 1500 international associations. (www.meetingpointbelgium.be)

- An extensive range of conference centers and meeting venues that offers room for up to 2000 participants and over 150 hotels with 12000 rooms makes Brussels a congress city, something mentioned as a USP for the city. (www.meetingpointbelgium.be)
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• The broad mix of cultures and languages with over 150 nationalities in the city makes Brussels a truly cosmopolitan city. (www.meetingpointbelgium.be) Just the fact that there are three official languages plus English gives the visitor a concrete example of this.

• Brussels is easy to reach with express train or direct flight connections from most parts of Europe. The location is therefore used as a USP in the promotion of Brussels. (www.meetingpointbelgium.be) TF also mention that everything can be reached with short distances between the cities in the Flanders region and a lot of experiences are easily reached. (Nijs, personal interview)

• Situated at the crossroads of the Latin and Germanic worlds, Brussels is a city of art and culture, with many museums, galleries, cinemas, theatres and concert halls. Grand Place and the Cathedral add to the cultural atmosphere in the city and popular comics such as Tintin and Lucky Luke originate from Brussels. Year 2009 has been named the year of the comics to heavily emphasize this USP. (www.meetingpointbelgium.be, La Group Leisure & Arts Consulting, 2006)

• Brussels is known for its offer in lifestyle and gastronomy. Restaurants with different styles and atmosphere offer typically Belgian or international food. Especially Belgian chocolate, beer and waffles are used as USPs. Furthermore, the many parks and the rich nature with green parks and short distances within the city are mentioned as USPs. Although gastronomy is not a unique USP for Brussels a high level of quality is maintained, making this a USP in itself. This USP is mentioned by all DMOs. (www.meetingpointbelgium.be; Nijs and Vrydag, personal interviews)
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The image of Brussels
Brussels is seen as international in everyone’s mind. The brand awareness of Brussels is very high, however most people mainly think about the EU when they think about Brussels. Lately it has become clear to the politicians and decision makers in Brussels that they need to work together with the DMOs to change and evolve the image of the city. BITC wants the image to be: “My European Village”. This is not very well-liked by the politicians while they do not want to talk about Brussels as a village, but as a city. “Village” should, according to Vrydagh, give you an impression of closeness and friendliness. Brussels also has a big mix of cultures and people, living close together like in a village. (Vrydagh, personal interview) To build the wanted image the main image concepts used by TF are: The good life, beauty and inspiration, Flemish history and meeting point Europe. Niche concepts mentioned are gay Flanders, war and history in Flanders and cycling and walking in the region. (La Group Leisure & Arts Consulting, 2006)

Target groups for Brussels
The three DMOs representing Brussels and the regions have relatively similar target groups, but they are also different in some respects. These target groups will be presented below.

For BITC the four target groups are city breakers, young people, people enjoying good life and conventions and fairs visitors. City breakers are people looking for a short break in Europe. These people can come from Belgium, the neighbouring countries or other European countries. The city breakers stroll the streets to explore the beautiful architecture and the atmosphere in order to get a feeling of the city. The second target
group is young people, referred to as the “cool people” by BITC. These visitors are between the age of 18 and 30. For these people a city that is unexpected is offered, in contrast to the old Grand Place image that the city has had in the past. One aspect where Brussels is not correctly perceived is in the “cool” aspect. Amsterdam on one hand is perceived as a cool city, which is visited by many backpackers. Brussels on the other side does not attract as many backpackers, but they have a lot of Erasmus students. BITC are working with these groups and are going to aim more at cool people in the near future. With “cool” Vrydagh refers to young people but also gay people, green people, etc. The third target group is the people enjoying good life. Popular activities are biking, walking, dining, etc. The fourth target group is the conventions and fairs visitors moving towards MICE, private meetings, incentives, conventions, events, and exhibitions. (Vrydagh, personal interview)

BITC is active in the convention and events field, attracting organisations organizing events, conventions, etc, and pointing out the attractions and opportunities and benefits of holding an event in Brussels. Until last year, city breakers and conventions have been prioritised target groups for BITC. This has evolved to marketing experiences for, not only city breakers, but also to other experience-seeking visitors. (Vrydagh, personal interview) Furthermore, BITC is trying to get city people to visit Brussels. That means that the DMO especially promotes Brussels to people living in Paris, London, Berlin and other big cities. An easy and quick connection to the home city is also important; therefore London and Paris with express train connections are important target markets. (www.brusselsinternational.be C)

80% of the time, the business and leisure visitor is the same person coming to Brussels first to a meeting or on other business. The person likes what he or she sees and decides to come back for a few days to discover the city more. This person is typically 30+, has university or other upper level education, and is working on a level 2 manager level with a partner at the same level, he or she has money, take two to three short breaks per year, and one longer two-weeks vacation. (Vrydagh, personal interview)

TF uses the AIDA model (Attention, Interest, Desire and Action) to structure their activities. They only work in the attention and interest stage, leaving the other stages to other stakeholders such as travel agents and hotels. The Censydiam model from the market research company Synovate is used to explain human motivation and why people go on holiday to a specific destination (www.censydiam.com). TF uses the model in a somewhat modified way to group potential customers in different groups. The model is based on two axes/dimensions. The horizontal with individual to the left and social-seeking to the right explains the personal characteristics of a tourist. The vertical axis with relaxing at the top and active at the bottom explains the activities the tourist likes to take part in. By combining the personal characteristics and the activities TF has identified four target groups. The style-people, the good life and comfort seekers, the independent explorers and the fun travellers.
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![Diagram: Target groups of TF](www.censydiam.com)

The target markets for TF are the neighbouring countries UK, France, Germany and the Netherlands, as well as the European countries Spain, Italy, Czech Republic, Austria and Scandinavia. Intercontinental markets are USA, China, Japan and India. Russia is also targeted but there is no local office there yet. (Nijs, Personal Interview)

TF has realised that they cannot reach everyone with their limited funds, therefore they are using a focus strategy to concentrate on a few markets with the biggest importance. The main reasons for this choice are the limited amount of people and resources available to promote Flanders and Brussels abroad and the increasing competition from other destinations. The focus strategy has been summarised in strategic choices. The most important choices are: to use Brussels and other Flemish cities as the primary product, to play on the tourists’ need for experiences and lifestyle and to develop a uniform brand strategy for Flanders. The primary market is the one for short holidays and they will concentrate on a limited number of geographical markets. The primary markets are the Netherlands, Germany, UK and France. Secondary markets are the US, Spain, Italy and Japan. According to TF, consistency and coherence is important when implementing this marketing strategy. (La Group Leisure & Arts Consulting, 2006)

Marketing channels used to promote Brussels
Since year 2000, Internet has become more and more important in the tourism industry. BITC realised that they could take control of how the city is marketed, therefore the ambitions of the organisation grew and BITC took a more prominent role in the European Cities Marketing Network (the world’s leading network of city tourist offices and convention bureaus), where Vrydagh is one of the board members. According to him, the challenge in this network is that you are cooperating at the same time as you are competing to get visitors to come to your own city. (Vrydagh, personal interview)

Also Nijs stresses the fact that online marketing has become increasingly important in recent years. Earlier printed materials, such as brochures, were more important for TF but with the increased Internet use and the opportunities to use multimedia content the importance of printed material has decreased in favour for online marketing. Internet has made it easier to target different customer groups with more specific offers at a lower contact cost since websites can be tailor-made according to the users’ interests. A change has also taken place from demographical target groups (for instance: 30+, couples without children) to motivational target groups (for instance: independent city explorers). According to Nijs, experiences are today more important for travellers. (Nijs, personal interview)
BITC uses different channels to reach out to potential visitors, with the website being the most important channel. Brochures, workshops, PR, trade fairs (for instance IMEX\(^1\)) and events such as the Brussels Day also play a role in attracting visitors to the city. The Brussels Day is when BITC joins forces with the Brussels export department, and the tourism and convention bureau and visits a major city to show the know-how and the opportunities for investment, meetings and tourism in Brussels based on USPs. These days have been organised in New York, Milan, Madrid, Paris and Berlin, with Amsterdam scheduled for 2009. (Vrydagh, personal interview)

Furthermore, BITC cooperates with journalists writing about the city helping them with material and photos. Vrydagh mentions the problem with three different organisations promoting Brussels (their own, but also the two for the Flemish and French parts of the country) confusing the visitor. More cooperation between the DMOs is needed to coordinate websites and activities to give one coherent official image of the city. (Vrydagh, personal interview)

Another obstacle is that when BITC wants to contact tour operators etc. they need to go through the Flemish or French organisations, making it harder for BITC to reach out. It is a daily fight with the other organisations to communicate with journalists etc. The tourism offices abroad are using public relations to promote the city, but today this is not enough. Advertising is not done directly through BITC but through the tourism bureaus abroad. A few years ago, campaigns were made in the National Geographic Magazine but the current politicians have directed the advertising funds to the tourism bureaus. BITC is therefore mainly concentrating on the website and brochures. The website has 150,000 unique visitors per month. Brochures and material are published in seven languages (French, Flemish, German, English, Italian, Spanish and Polish). Furthermore, BITC cooperates with hotels with a dedicated booking website to direct guests to the hotels and travel agents in order to provide information and products like the Brussels Card. (Vrydagh, personal interview)

TF also invites press and journalists to come and visit Flanders to write articles about the destination. For the MICE market they visit trade fairs to attract conventions and meetings. This is done mainly through the offices in the local markets, with support from the Brussels head office. The Brussels office is also participating in fairs where there is no local office. Furthermore TF is cooperating with travel companies such as Thalys (express trains) and PNO Ferries to combine offers with a journey and a visit in the region. Competitions where people can win a trip to the region are also important activities. (Nijs, personal interview)

Nijs points out that the offices on the different markets are working quite independently from each other since they best know how to reach customers in their own markets. All the representatives from the different markets meet two days every year in Brussels to discuss general plans and to learn from each other's activities. Meetings are also held throughout the year between the head office and the different markets. TF are only working to attract tourists and MICE guests. They are however cooperating with Flanders Investment & Trade, an organisation that drives investment and trade to the region. (Nijs, personal interview)

\(^1\) IMEX: the Worldwide exhibition for incentive travel, meetings and events
Logotypes used in the marketing of Brussels

Brussels International uses a symbol of a yellow eye with a blue square background to promote the city. These colours have been chosen because they are the colours of the region and the EU. Vrydagh expresses that these colours are not the best when promoting a tourism destination, because blue is often perceived as a cold colour (used for products going into the freezer), and yellow is not warm enough. Orange would be better and warmer, reflecting the feeling you should get of Brussels as a destination. The eye has been chosen to represent the way the tourist see Brussels. (Vrydagh, personal interview)

The logotype for TF is a symbol in white representing an “f” for Flanders with a pink square around it. The words flanders and belgium in pink are written in a contemporary font below the symbol and are translated to suit the local market where the destination is promoted. According to Nijs the logotype was introduced a couple of years ago with the aim to give a more modern and contemporary logotype in comparison to the old logotype used. Nijs maintains that the logotype has been well received by tourists and local inhabitants. (Nijs, personal interview).

Funding DMO activities

The city and the region are funding BITC, this makes them dependent on the President and CEO’s interest in tourism. The current president Charles Picqué is heavily involved and interested in tourism and even gives recommendations on an operational level to the DMO.

Today BITC generates an income of 12 million Euros, coming to the equal extent from public services and from generated income. Apart from this the French and the Flemish DMOs add approximately another 7 million Euros to promote Brussels. This money could according to Vrydagh be used much more efficient if it was coordinated through one marketing strategy. The Flemish DMO promotes Brussels as an art city and the Wallonian DMO promotes Brussels as “The entrance door to Wallonia”. BITC themselves are promoting Brussels as major competitors to Amsterdam, Vienna and Copenhagen. Here Vrydagh is once again stating the most important thing to do; to create coherence. (Vrydagh, personal interview)

The DMO TF is mainly funded through the Flemish government. However, sometimes campaigns and other activities are funded with help from the cities or from other companies within the tourism sector, such as hotels, etc. (Nijs, personal interview)

Measuring success

BITC measures their success in bed nights, but also through image indexes, such as Anholt’s city ranking. (Vrydagh, personal interview) At TF, success is measured through bed nights and arrivals, but also with the aid of statistics from the national statistics bureau. TF’s actual contribution to the above measures is however hard to evaluate.
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Therefore, TF reports the number of customer contacts and press value (value of the advertising the region gets through articles etc.). Nijs also points out that they are measuring success with help of the city ranking index by Anholt. Nijs mentions that Brussels receives low scores in some of the sub-indexes because the destination is often seen as safe and boring. (Nijs, personal interview).

**Marketing Brussels today and in the future**

During Vrydagh’s time with BITC, low cost airlines and express trains have made city breaks more easily accessible and affordable for visitors. Research has shown that people can accept to travel three hours for a city break, which gives Brussels a good opportunity to attract visitors. 50 percent of the visitors to Brussels come because of business, lobbying, conferences or fairs. (Vrydagh, personal interview)

A challenge when promoting Brussels as a destination to leisure tourists is the lack of big well-known landmarks of the city. With this in mind BITC has opted to use image-pillars to bear differences and characteristics of Brussels. Examples of these are: art of living, royalty, comic strips, pralines, green spaces, art nouveau and events. According to Vrydagh, one weakness is the lack of an architectural or cultural landmark to counteract the image of the European institutions. The campaign using image-pillars was launched in 1997 and had in year 2003 contributed to more than 700 000 guest nights, an increase of 50 %. ([www.brusselsinternational.be](http://www.brusselsinternational.be))

Today all cities have websites made by professional people, easily aimed at different target groups. Competitors can easily copy the marketing techniques and the way you reach customers, so today what really matters is the image and branding position of the destination. The roots of what make people in Brussels different and perceived as different are important. Today most cities look alike, therefore differentiation is of greatest importance. An example is the “art cities” promoted in Belgium, this can attract visitors, but it is also easy for competitors in, for example, the new EU countries to copy, as they sometimes do not have any or few positive and attractive traits to promote. Brussels does therefore not want to be an art city, but something else. The marketing of Brussels is therefore moving towards Anglo-Saxon and Scandinavian marketing where the historical focus has less importance and the modern society and the new aspects of the cities are more prominently showed. (Vrydagh, personal interview)

A question that arose during the interviews was the one regarding the cooperation, or more specifically the lack of cooperation between the three DMOs promoting Brussels. Nijs would like to see a closer cooperation with the two other DMOs but she sees the political problems dividing Belgium into different regions as the biggest hurdle. (Nijs, personal interview) Vrydagh at BITC shares Nijs’ view regarding the lack of connections between the different actors, the incoherent marketing campaigns and the dispersed image. It needs to be understood that a marketing language comes down to a coherent pooling of the destination’s winning assets in order to give a uniform appearance of the city. The plan is to make people want to see Brussels, to create an image moving away from the global political reputation of the capital of EU, and to adopt a brand signature that distinguishes Brussels from other cities. Furthermore, a coherent brand image should be conveyed creating an emotional relation with the customer. Vrydagh is convinced that Brussels is desirable for its European village atmosphere. Vrydagh is further of the opinion that local residents need to be involved to show the multitude the city has to offer. Moreover, he thinks that politicians need to realise the importance of tourism for Brussels. Vrydagh sees the involved politics as an obstacle that slows down the decision making process. (Vrydagh, personal interview) Another important area of improvement is the congress facilities, which according to Vrydagh needs to be
renovated and improved in order to win corporate business in competition with other major cities in Europe. (www.brusselsinternational.be C)

Brussels is very important in the promotion of the whole Flanders region, as it is the most known city and often the arrival point to the region. The principal is that the further away the target market is, the more focus is put on Brussels as the main attraction. Within Belgium for example, the cities are less important since short breaks are more important. It is easier to sell cities than the region Flanders. (Nijs, personal interview)

In the strategic marketing plan for the DMO, the current situation is characterised by increased changes in the competitiveness field, in the unpredictability and the lack of consumer loyalty and in the ever-changing demands of foreign visitors. (La Group Leisure & Arts Consulting, 2006)

**Lessons and recommendations on destination branding**

When studying destination branding it is important to see the difference between product and place branding. Destinations are intangible and thus emphasise more on experiences rather than concrete products (Nijs, personal interview). Vrydagh and Nijs both point out that in destination marketing you cannot control your destination, something you can do to a much greater extent with a product. Vrydagh uses sweets as an example. If customers do not like the sweetness or the colour of a product, it is fairly easy to adjust this, but if a tourist comes and say that a destination is disorganised or too expensive, it is much harder to adjust the destination. This is a problem and requires a lot of time, money and effort.

Vrydagh is of the opinion that coherence and continuity is needed between DMOs in destination branding. Furthermore, it is important that private and public stakeholders cooperate to achieve the same goals. In the last decade, the get-togethers between stakeholders and the coherence building has become more and more important and this is also something that BITC is working a lot with.
4.2 Istanbul, Turkey

“If the world was a single country, its capital would have been Istanbul”

Napoleon Bonaparte

4.2.1 Introduction

Today Turkey has approximately 72 million inhabitants and the capital is Ankara. However, Istanbul is the largest city in Turkey with its 12.6 million inhabitants. (MoT, personal interview) Located on the Bosphorus peninsula between Anatolia and the Balkans, Istanbul has one foot in Asia and one in Europe. On the north of the city, the Black Sea is to be found and in the south the Marmara Sea. (www.ne.se)

Istanbul has an ancient history and has been the centre of important political, religious and artistic events for thousands of years (whc.unesco.org). Through history Istanbul has been the capital of three different empires. First the city was named as Byzantium, then Constantinople and when the Turks conquered the city in 1453 they called the city Istanbul. However, first in 1926 the city was officially named Istanbul. (www.ne.se) The empires have left different traces in form of palaces, castles, churches, mosques as well as monuments. (www.goturkey.com A)

With the foundation of the Turkish Republic, Istanbul was no longer the capital of the nation, but the city remains being the cultural and business centre of the country. Today Istanbul is a modern, lively city with a unique identity and an enchanting blend of Eastern and Western culture. (www.goturkey.com A)

4.2.2 The tourism industry in Istanbul

The Turkish tourism industry is one of the country’s most important factors for economic vitality and it has a great potential for market growth (STC Tourism Fact Pack). However, the Travel and Tourism Competitiveness Report 2009 ranks Turkey on place 56 out of 133 countries. This is a decrease with two rankings, comparing to the placing in 2008. Today, 2.9 % are employed in the tourism industry. TTC-index ranks Turkey significantly lower than Belgium and Germany in most categories. In the categories regulatory framework in the travel and tourism industry, Turkey was ranked 63 out of 133 and in business environment and infrastructure Turkey reached place 60. When it comes to human, culture and natural resources Turkey scores somewhat better and is ranked 44 out of 133. Policy rules and regulations as well as prioritization of travel and tourism are considered as competitive advantages for Turkey. However, in the categories safety and security as well as environmental sustainability Turkey scores low and these points are considered as competitive disadvantages. (www.weforum.org)

The number of tourists visiting Istanbul has grown dramatically in recent years. In 2000 2.5 million people visited the city and in 2008 the number had grown to over 7.5 million. (Bilgili 2008) However, this is probably a lower number than in reality, since the statistics do not include visitors arriving in Istanbul by car. (Çelik, personal interview) According to Euromonitor, Istanbul was the third most visited European city in 2007. (MoT, personal interview) Today there are approximately 100,000 beds held ready for visitors and the city has the capacity to accommodate even more visitors.

The reason why Istanbul has seen such an increase in the numbers of visitors in the last years is partly due to the many cultural and sports event and congresses. (Demirel, Taş personal interview) In 2004 Istanbul hosted the Eurovision Song Contest, in 2005 the
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Champions League Final and in 2009 the UEFA Cup Final, the World Water Forum as well as a Formula One race. (Balci Fisunoglu, personal interview) The festival season usually runs from April to November. Hosting international festivals for Film, Theatre, Music and Jazz Istanbul also attracts big crowds to the city. (www.icvb.org A) According to Balci Fisunoglu at ICVB, Istanbul has also become a popular destination for congress tourism in the last couple of years. (Balci Fisunoglu, personal interview)

Table 4 shows the top source destinations in Istanbul, where the biggest group of visitors by far is Germans. Around 1,030,000 Germans visited Istanbul in 2008. (Bilgili 2008) The most common reason for foreigners visiting Turkey is leisure and entertainment. However, visiting relatives, shopping, work, exhibitions and commercial relations are also common reasons for foreigners travelling to Turkey or for citizens to travel within the country. (STC Fact Pack 2006) The high number of German visitors could have an explanation in the fact that many people with Turkish heritage live in Germany and visit family and friends in Turkey. Russians have the second place with 422,000 Russians visiting Istanbul in 2008 (Bilgili 2008). Looking at the top 10 on the list it becomes clear that visitors are coming from all over the world to visit Istanbul.

4.2.3 DMOs promoting Istanbul
Since Istanbul is one of the biggest cities in the world, several DMOs in the city as well as in the country serve to market Istanbul as a destination. Following are presentations on the DMOs working to promote Istanbul: The Turkish Ministry of Culture and Tourism (MoT), Istanbul Convention and Visitors Bureau and an external organisation, Radisson Blu.

The Turkish Ministry of Culture and Tourism (MoT)
The Ministry of Culture and Tourism (MoT) is the governmental department responsible for the tourism industry in Turkey. Because of the structure of the organisation, interviews with five different representatives at three different levels have been conducted in order to get a broader spectrum of the work of the MoT. When the interviewees at the head office in Ankara have given a common answer, they are referred to as MoT.

The overall mission of the MoT is to strengthen the positive image of Turkey and positioning Turkey as one of the top five country brands in the world tourism market. The goals of the MoT are to sustain and develop the actual market share of Turkey in the main markets, by using the cost/quality advantage. Furthermore they work to strengthen the brand position by developing Turkey's positive image as well as stressing the diversity of tourism products such as culture, golf, MICE, yachting, youth, city tourism etc. To increase tourism income and length of stay and to promote international sports and cultural organisations in Turkey are other goals for the MoT. (MoT, personal interview)

The MoT is divided into three levels. The headquarters are situated in the capital Ankara and work as supporting service units and are on the top of the organization. Furthermore, there are local offices in all different provinces. Interviews with representatives from the three different levels have been conducted, the general
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directorate for promotion, the local information office in Istanbul and the Turkish information office in Stockholm.

The MoT is responsible for the marketing of Turkey and Istanbul. Destination marketing has become increasingly important for the MoT in the last years in order to compete on the world tourism market. The MoT works to protect the image of Istanbul and brings the city's cultural and historical richness to the foreground. To be able to meet the needs of the developing tourism sector, the MoT in Ankara has restructured its organisation, promotion strategy and marketing plans. Furthermore, destination marketing plans have been integrated into the main marketing plans of the organisation. In 2000 the MoT mainly worked with promoting Turkey as a whole destination. However, since destination marketing gradually has become more important, the MoT has also started to specifically market major destinations such as Istanbul. At a local and national level, the MoT works together with organisations at different levels such as Istanbul hotel academy association and TURSAB (Association of Turkish Travel Agencies). Moreover, the MoT works together with private enterprises and organises meetings with private sector representatives in order to determine campaign strategies in cooperation with the private sector. (MoT, personal interview)

Istanbul Convention & Visitors Bureau - ICVB
ICVB was established in 1997 and is a non-profit organisation, with seven employees, that represents Istanbul around the world as a leading resource for international associations and corporations seeking to hold events in Istanbul. The organisation has played an important role in Istanbul’s rise in popularity as a destination for high-profile international congresses and events. The DMO works closely together with its members covering the full spectrum when it comes to conventions. Furthermore, ICVB cooperates with tourism industry associations, the MoT, the Istanbul Chamber of Commerce as well as the Istanbul Metropolitan Municipality. (www.icvb.org B) ICVB has the mission of making Istanbul a leading international congress destination. The organisation’s approximately 60 members consists of 4-5 star hotels, PCOs, DMCs, convention centres and suppliers such as restaurants, construction companies etc. The main mission of the organisation is to serve their members in accordance to their requests. (Balcı Fisunoğlu, personal interview)

Radisson Blu
Radisson Blu (former Radisson SAS) is a hotel and resort chain. Radisson Blu is part of the Rezidor Hotel Group with 370 hotels in operation and under development in 58 countries worldwide. Initially it was planned to conclude different hotel chains as DMOs for the thesis, something that was later changed. However, the interview with Ian Rydin, General Manager at the Radisson Blu Bosphorus Hotel in Istanbul was fruitful and therefore kept and used in the thesis.

4.2.4 Destination branding in Istanbul

The Unique Selling Points (USPs) of Istanbul

- The historical and cultural richness are USPs that all five DMOs use to promote the city. (MoT, Taş, Çelik, Balcı Fisunoğlu and Rydin, personal interviews) The foundation of today’s Istanbul was laid in the 7th century BC and since then Istanbul has been the capital of several empires. Today most historical sights are located on the historical peninsula which stands as the cultural and historical

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2 Professional Congress Organizers
3 Destination Management Company
centre of Istanbul. Historical sights, including Hagia Sofia erected in the 6th century was built as a church, turned into a mosque by the Ottoman Sultan Mehmet II and is today a museum. The Blue Mosque, the only mosque in the world with six minarets, the Basilica Cistern, an underwater cistern built by the Romans, Topkapı Palace, the first palace built for the Ottoman sultans, the Grand Bazaar, aqueducts and remaining of the Roman Hippodrome are to be found in Istanbul. (Istanbul Visitors Guide – ICVB)

- Today Istanbul is a modern vibrating metropolis with one foot in Europe and one in Asia. The position of Istanbul as a crossing between the two continents has always been an important factor for the city. The geographical location of the city, being the only city in the world located on two continents and more or less surrounded by water, from the Bosphorus, the Golden Horn as well as the Marmara and the Black see, is another fact emphasized by the DMOs in their marketing of Istanbul. (MoT, Taş, Çelik, Balcı Fisunoğlu and Rydin, personal interviews)

- Rydin from Radisson Blu says Istanbul gives its visitors a cultural experience. (Rydin, personal interview) Taş at the Stockholm office maintain that Istanbul with its modern skyscrapers, big shopping malls, clubs, bars and sports arenas together with the old historical sights makes Istanbul a versatile destination. (Taş, personal interview)

- Although it is a very competitive market, organizing conventions in Istanbul has become popular in the last 10 years. Today, not many European cities can host conventions for 20,000-25,000 people, something the convention infrastructure in Istanbul allows. Today, many bigger European cities that Istanbul is competing with, other so called “old convention cities” have held so many conventions that many visitors do not find them exciting to visit. Istanbul on the other hand being a fairly new destination for conventions is by many seen as interesting. ICVB also stresses the city’s modern conventional infrastructure in combination with its history, cultural richness, shopping, world-class dining and natural beauty making Istanbul a great destination to hold conventions in. Istanbul’s capacity to hold bigger conventions is an important USP. (Balcı Fisunoğlu, personal interview)

- Being the financial centre in Turkey, Istanbul is the locomotive of Turkey’s economy. Foreigners doing business in Turkey often visit Istanbul. Istanbul’s geographical location being a bridge between Europe and Asia makes it an attractive meeting point for many businessmen from for example Europe that are doing businesses in Central Asia and Caucasus. Rydin explains that many European businessmen doing business with the “-stan” countries often travel to Istanbul to have their meetings. Although, many of the countries in Caucasus and Central Asia once belonged to the Soviet Union their culture and values are more similar to the Turks than to the Russians. The strategic location of Istanbul being a convenient place for businessmen to meet is another important USP. (Rydin, personal interview)
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The image of Istanbul
Radisson Blu conveys their image of Istanbul with the word “magic” in the marketing campaigns. (Rydin, personal interview) ICVB describes Istanbul as “historically dynamic” and underlines the fact that the culture and traditions of the city is a mixture of East and West. Furthermore, ICVB promotes Istanbul as one of the most exciting conference destinations and an increasing popular choice for the world’s leading international associations. (www.icvb.org B) The different offices of the MoT underline the hospitality of the Turkish people and the fact that Istanbul has a harmony between three monotheistic religions as important factors in their description of the image of the city. (MoT, Taş Çelik, personal interviews) Aksunugur from the MoT describes Istanbul as a dynamic city that never sleeps. Furthermore, she portrays Istanbul as an open air museum for all ages. (Aksunugur, personal interview) Taş prefers to describe Istanbul as a manifold city that attracts tourists to it with its many cupolas, minarets, skyscrapers and bazaars. Today, most historical attractions in the city are to be found on the historical peninsula whereas the heart of modern Istanbul lies in the area Taksim, where the ambience of the modern city of Istanbul with restaurants, bars and shopping malls can be found. (Taş, personal interview)

Target groups in Istanbul
Istanbul is among the main destinations being promoted by the MoT and the government works on positioning Istanbul as a short break destination for Easter, Christmas, and school holidays. (MoT, personal interview) The MoT divides their main target groups into three categories, travellers, tour operators/agencies and media. The MoT considers travellers with high education and an income in the middle or upper
spectrum a target group. People who are price sensitive, but at the same time keep product quality in mind, as well as young people and frequent travellers are mentioned as target groups for the MoT.

Taş has seen an increase in young people travelling to Istanbul for shopping, party and to visit cultural sights. 15 years ago it was mostly elderly people, interested in history, that visited the information office in Stockholm in order to get information about Istanbul. Though this group is still very big, other target groups have now gotten more interested in visiting Istanbul. (Taş, personal interview)

Balcı Fisunoğlu and Çelik maintain that people of all ages from all over the world visit Istanbul. (Balcı Fisunoğlu and Çelik, personal interview) Balcı Fisunoğlu highlights the fact that Istanbul is a price worthy city offering something for both the low budget as well as the high budget visitor. (Balcı Fisunoğlu, personal interview) Çelik emphasizes the diversity of the city and gives an example of Japanese tourists that prefer to visit museums whereas younger people hang out in the Taksim area visiting clubs, restaurants and bars. (Çelik, personal interview) ICVB targets customers interested in holding their conventions in Istanbul. However, not only the convention locations and infrastructure are promoted but also Istanbul and what the city has to offer in terms of leisure tourism. (Balcı Fisunoğlu, personal interview)

According to Rydin Istanbul is the perfect destination for many Europeans, since Europeans want to experience something new, but at the same time they prefer to maintain a high standard and a culture not too different from their own. The hotel tries to target customers that have already decided to visit a place in the Mediterranean, but has not yet made up their mind whether they want to visit Athens or Istanbul for example. Being a high standard hotel chain, their main target group is business travellers. (Rydin, personal interview)

People looking for the 3S (sea, sun and sand) is not the right target group for Istanbul. (MoT, Çelik, and Rydin, personal interviews) However, even in this case Taş and Balcı Fisunoğlu maintained that there are also the Princes Islands located outside of Istanbul offering both sun and bathing possibilities in the summer. (Taş and Balcı Fisunoğlu, personal interviews)

When it comes to targeting specific countries, the MoT claims that all European countries are important target countries as well as the US and Japan. Turkey in general has become a popular tourism leisure and shopping destination for many Russians, making them an important target group for the DMOs. (MoT, personal interview) The popularity has also had an impact on the convention market and ICVB has seen an increase in Russians holding their conventions in Istanbul. (Balcı Fisunoğlu, personal interview) The shopping in Istanbul also attracts Israelis, East Europeans as well as people from the Middle East countries (MoT, personal interview). The visitors to the conventions are coming from all over the world to visit Istanbul. Visitors from India, Brazil and Argentina have recently started to come to Istanbul for conventions. This is according to Balcı Fisunoğlu a result of the hard work of the travel agencies. (Balcı Fisunoğlu, personal interview)

**Marketing channels used to promote Istanbul**

The importance of destination marketing has resulted in a special destination marketing plan developed for Istanbul by the MoT. 3-4 years ago the MoT started marketing Istanbul as a destination and began creating marketing campaigns for the city. After shooting the first destination commercial on Istanbul in 2007, another five commercials for five other destinations in the country were made in 2008. (MoT, personal interview)
In 2009 the MoT works hard to make people aware of the fact that Istanbul is the European Capital of Culture in 2010. A commercial for Istanbul has been created and is being broadcasted on international TV channels as well as on local channels in the MoTs target markets. The slogan of the commercial is “Love of continents”. (MoT, personal interview) Balcı Fisunoğlu says she believes it is positive to have the same commercials and advertisements all over Europe. Many businessmen travel between different destinations in Europe and it is important to have the same advertisements at airports for examples. To have different kinds of advertisements can cause confusion. (Balci Fisunoğlu, personal interview)

The MoT, the Turkish information office in Stockholm and ICVB participate at fairs in order to promote Istanbul. (MoT, Taş and Balci Fisunoğlu, personal interviews) The MoT also takes part in cultural, artistic and sport events such as Cannes Film Festival, F1 and the Olympic Games. Media members are targeted with hospitality programs, meetings and other PR activities. The MoT has implemented a special hospitality program called “Feeling Istanbul” in which 55 journalists took part. The aim with the program was having the journalists doing PR for Istanbul. The PR has paid off and in 2008 Istanbul was declared the third best destination in Europe and the ninth best in the world by the Travel & Leisure Magazine. Istanbul being appointed as the European Capital of Culture is also a big opportunity to promote the city. The MoT says that everything shows that Istanbul is one of the more preferred destinations in the world and more and more people seem to discover the city. To promote the city in different ways for different target groups the MoT uses advertisement channels like print media, outdoor activities, TV and internet. Furthermore widely-circulated magazines and newspapers as well as outdoor & indoor marketing tools (billboards, airports, buses, taxis etc.) are used in their marketing campaigns. Search engines such as Google, Yahoo and online travel websites are other tools being used. To attract travel agencies, PR activities such as workshops, info-tours and road shows are carried out. (MoT, personal interviews)

In addition to MOT, the information office in Stockholm also works with PR and organises trips to Istanbul for journalists and then hopes to have them write about the city. Furthermore the Stockholm office sets up workshops and now and then they put up small booths in local department stores where they hand out brochures and serve Turkish wine and Lokum (Turkish Delight) to create interest in visiting Istanbul. In order to draw more tourists to Istanbul the Stockholm office collaborate with Swedish travel agencies (Taş, personal interviews). Furthermore, Taş mentions that word-of-mouth has become increasingly important in the marketing of Istanbul. (Taş, personal interview) This fact is also stressed by Aksungur. Once someone has visited Istanbul and has had a good experience the person will share his or her positive experiences with family and acquaintances once returning home. This is an important way of marketing Istanbul and contributes to sustain a positive image of the city. (Aksungur, personal interview)
Logotypes used in the marketing of Istanbul

According to Demirel at the MoT in Ankara, the official logotype of Turkey, launched in 2000 symbolizes a red tulip with a blue and green leaf above Turkey written in italics. (Demirel, personal interview) The tulip is by many associated with the Netherlands. However, the Dutchs were first introduced to the tulips by the Ottomans in 1593. (www.allaboutturkey.com) The Turkish logotype is to be found on all sorts of places from tissues till buses.

The blue leaf symbolizes water whereas the green leaf symbolizes the nature of the country. Implementing a logotype takes about five years and at this point the logotype has become a well-implemented symbol for Turkey. Initially it was thought to become the symbol of the Turkish government, however the logotype got a more commercial status and is nowadays being used by private organisations and enterprises in the Turkish tourism industry. (Demirel, personal interview) Instead of having a specific logotype for Istanbul, the government prefers to use visual pictures such as Maiden Tower and the Bosphorus Bridge as well as other historical sights such as Hagia Sofia, The Blue Mosque and the Sultan Palaces. (Gözeth, personal interview) These sights are popular among other DMOs in the city. The silhouette over the historical peninsula with the Blue Mosque and Hagia Sofia is mentioned as an example of a sight, which could be used as a logotype for Istanbul. However, the MoT in Ankara maintains that the silhouette consisting of several minarets could frighten people and give the wrong image of Istanbul being an Islamic fundamental city. In addition to the logotype slogans are being used to promote Istanbul. “So much to live – so much to love” is the slogan for 2009. (Demirel, personal interview)

The logotype used by the ICVB seems to show a red tulip, a symbol also used by the MoT. The skyline shows a building with four minarets, probably Hagia Sofia. In the skyline “historically dynamic” is written. The logotype has two pictures and relatively much text written in different fonts on such a small symbol.
Measuring success
The MoT measures their success through assessing the impact of their advertisement campaign on their target groups through market research. (MoT, personal interview) The increasing number of visitors to Istanbul is another measurement of success stressed used by the DMOs.

Handling negative information
Compared to the other destinations studied, Turkey and Istanbul has a different geopolitical location. Although 99 percent of Turkey's population is Muslims, Turkey can not be defined as a typical Islamic Middle East country neither can it be defined as a typical European country. Instead, different sources put Turkey in different categories. (Sönmez and Sirakaya 2002) Despite this, Istanbul is an international city, something that people might not be aware of because of the perception of Turkey.

No destination is safe from terrorism, however criminal-wise Istanbul is one of the safest metropolitan cities in the world. Having many female visitors to the conventions Balcı Fisunoğlu often gets questions regarding the safety in Istanbul while promoting the city abroad. Many female participants are concerned about whether it is safe for them to walk home late, something Balcı Fisunoğlu confirms that it is. Having many American visitors at the conventions Balcı Fisunoğlu had to answer questions concerning the safety in Istanbul after the terror attacks at the World Trade Centre in New York City in 2001. Some people wanted to know how big the distance was from Istanbul to Afghanistan and if it could be dangerous to visit Istanbul. Hosting the NATO meeting in 2004/2005 was a way of showing that Istanbul is a safe city. If country leaders could visit the city, so could tourists and businessmen. (Balcı Fisunoğlu, personal interview)

The MoT carries out a crisis management strategy in the course of circumstances that may negatively affect tourism demand to Turkey or the image of the country. During a crisis period, the MoT plan to emphasize PR activities in the target countries as well as inform people about the situation. In 2009, a crises management handbook will be published. (MoT, Çelik and Taş, personal interview)

Marketing Istanbul today and in the future
The MoT, being the centralised state administration governing the Turkish tourism industry, critics have raised doubts about the MoT's centralized way of working and maintain that the MoT takes decisions and implements plans without carefully taking regional and local conditions into account. The system has made the state ineffective in responding to problems of which require day-to-day and season-to-season operational decisions. The MoT has made significant contribution to promotional campaigns, but they ignored the social, cultural and environmental implications of such activities. (Cevat and Dallen 2001)

In this aspect the Stockholm office agrees with the criticism and maintains that they have a greater knowledge about the Scandinavian market compared to the decision makers in Ankara. This has been ignored at some occasions and has led to failures on the Swedish market. Nowadays when the Stockholm office pushes for changes, Taş maintains that they are trying to compromise with the head office. (Taş, personal interview) Çelik at the local Istanbul tourism office also confirms that when it comes to marketing Istanbul and Turkey, the marketing strategy is centralized. Smaller Turkish cities have the power to decide how they want to approach and market their cities, whereas bigger destinations such as Istanbul are governed by the MoT. (Çelik, personal interview) Rydin at Radisson Blu also criticizes the Turkish government’s way of working and says he thinks the MoT is not using the right communication channels. As an example he stresses that they are absent on the biggest tourism fair in Sweden. Furthermore, he blames the
bureaucracy and the dissonances between the big political parties in Turkey for causing problems for the tourism industry. (Rydin, personal interview) Demirel at the MoT in Ankara says that the MoT is a fairly hierarchic organisation. Depending on the size of the project, the local offices can take decisions regarding smaller projects. However, when investing in bigger projects, it is crucial that also the MoT is involved within the decision. (Demirel, personal interview)

The MoT has developed long and short-term goals for their marketing plan. The overall goal is to improve Turkey's market share in main and developing tourism markets, and to maintain mature markets. The MoT wants an annual increase under normal circumstances of the total number of tourist arrivals with 10% and the total tourism receipts of 12%. In addition, focus also lies on increasing the share of the high-income visitors as well as increasing the per capita expenditures and average length of stay. (MoT, personal interview) The short-term goal by the MoT is to reach 8 million visitors in 2010 (Çelik, personal interview).

In the long run the MoT aims at making Istanbul one of the five most visited cities and to have a financial advantage from the tourism sector. One of their goals is to have the same number of tourists as Paris. (Çelik, personal interview)

Being among the most visited cities in the world, Istanbul with its big population and a continuously growing GDP Rydin believes the city will become a much more important financial city in the future. However, in the future destination marketing will be focused on environmental sustainability and a sustainable infrastructure, areas in which Istanbul is far behind many other European cities. (Rydin, personal interview)

**Lessons and recommendations on destination branding**

Today there are several DMOs working to promote the city. Therefore it is a difficult to carry out strong political questions since these DMOs do not have anyone to report to. Çelik and Balci Fisunoğlu believe an efficient way of gathering information and look after the interests of all DMOs would be to create an institution that can make decisions in the spirit of common interest on behalf of the DMOs working to promote Istanbul as a destination. (Çelik and Balci Fisunoğlu, personal interviews)

Demirel maintains that the most important thing he has learned during his career is that is significantly harder to promote a country or a destination in comparison with an industrial product or service. Considering the many factors influencing a destinations image such as history, prejudgments, geographical factors, political affairs and disasters it is hard to preserve or strengthen a destination's brand position. Only designing a logotype or running an advertisement campaign is not enough, but PR campaigns and event marketing activities have to be carried out effectively. Moreover it is necessary to protect product and service quality on the top level, since the customers travel experience is in the end the most important thing. Word-of-mouth is an important marketing tool and negative and positive thoughts circulate very fast. In order to keep the positive effect alive, actor within the tourist industry need to provide good travel experiences and organize effective promotion activities. Furthermore Demirel stresses the importance of cooperating and working together with public and private sectors as well as universities. Knowing your target groups and following new tourism trends in terms of destination marketing is also important. In order to create an effective marketing campaign, you need to conduct market research and then determine promotion strategies and campaign messages according to the outcomes of the market research. (Demirel, personal interview)
4.3 Stuttgart, Germany

Surrounded by rolling hills, forests and vineyards at the heart of the Neckar valley, this regional capital has an unforgettable setting and a wealth of architectural styles that give it a charm of its own.

(www.germany-tourism.de A)

4.3.1 Introduction
This might not be the description that first comes to your mind when you hear the name Stuttgart. In fact, it will probably take a while before you recognize the city and suddenly exclaim: “Of course, the car city!” A large reason for this are the multinational companies such as Mercedes Benz and Porsche that are based in Stuttgart. However, Stuttgart is more than that: An important congress and meeting location as well as host to numerous sporting events, musicals and a well-known ballet.

Germany is situated in central Europe with a population of 82 million and is the largest economy in Europe (www.cia.gov B). Stuttgart has 600,000 inhabitants and is the state capital of the third largest federal state of Germany, Baden-Württemberg. (www.stuttgart-tourist.de A). This makes Stuttgart the sixth biggest city in Germany (www.tourgermany.com).

Stuttgart is a cultural city; there are more than 40 theaters, 30 galleries and three large art museums in the city (www.tyskland-info.se A). The state theatre offers renowned plays alongside the world famous Stuttgart ballet. The state opera has received the title “Opera house of the year” several times by a jury selecting among the opera houses in Austria, Germany and the German-speaking part of Switzerland (www.stuttgart-tourist.de B). Moreover, Stuttgart is known as a festival city and a sports city that has hosted world championships, European championships and other sports tournaments (www.stuttgart-tourist.de C). After winning the German championship for the 5th time in 2007, the local football team VfB Stuttgart established itself as one of the top clubs in the national league and in Europe (www.stuttgart-tourist.de D). In 2009, VfB Stuttgart reached the 2nd place in the national football league. Something else that makes Stuttgart special is that it has the only zoologic-botanical garden in Europe, Wilhelma. (www.tyskland-info.se B). Stuttgart also has the largest reserves of mineral water in Western Europe, 19 mineral springs feed the three mineral spas (Stuttgart Regio Brochure). The region also attracts tourists interested in hiking and bike tours in the Swabian forest (www.tyskland-info.se C). These are all factors which contribute to the attractiveness of Stuttgart as a tourist destination.

The attractiveness of Stuttgart as a tourist destination is for example reflected in the readiness of investors and hotel chains to invest in Stuttgart. The Neue Messe Stuttgart, an international congress center built in 2007, also ensured an increase in tourism during the following years, as it soon was booked two years in advance. Currently, Stuttgart has an 8th place on the German top-10 hotel websites and the demand for accommodation has grown faster than the supply of accommodation, which has lead to the planning of new hotels such as an Acorr hotel, a Park Inn, a Holiday Inn, a Holiday Inn Express as well as a Motel One hotel. Because of this, Stuttgart has been called a Mecca for hotel investors. (www.pfkhotels.com)
4.3.2 The tourism industry in Stuttgart

According to the TTC, Germany was ranked 3 out of 133 countries in 2008, which is the same ranking as the previous year. Germany ranks well in most sub-indexes, such as ground transport infrastructure, human resources education, cultural resources and tourism infrastructure. However, Germany ranks less well in affinity for travel and tourism and prioritization of travel and tourism, and ranks relatively bad (3.8 out of 7 points) in price competitiveness. (www.weforum.org) The tourism industry in Stuttgart provides a yearly income of about 1.6 billion Euros in the gastronomy, hotel, retail and recreation sections of the economy as well as the suppliers of cultural institutions (presse.stuttgart-tourist.de A).

After breaking the record of overnight stays in 2006 due to hosting games in the FIFA Football Championship, the tourism trend has been continuously positive. In 2008, Stuttgart registered 2.7 million overnight stays and 1.5 million arrivals. (presse.stuttgart-tourist.de B) Germany as a whole had 25 million visitors in 2007 (www.weforum.org). The tourist volumes have more than doubled since 1993. Klaus Lindemann, managing director of Stuttgart Marketing GmbH, called this a big success with roots in the more intense and differentiated adaptation to the market. He also said that Stuttgart had established itself as a popular city destination within Germany as well as abroad (presse.stuttgart-tourist.de B). According to Interviewee 2, one third of the tourists in Stuttgart are leisure tourists, one third are business tourists and one third are trade show tourists (Interviewee 2, personal interview).

Table 5 shows the top source destinations of tourism in Stuttgart. As can be seen in the table, Germany is the biggest source destination, that is, domestic travel is the biggest source of tourism. In 2008, the average stay in Stuttgart was 1.9 days. (presse.stuttgart-tourist.de B) This shows that Stuttgart is a short breaks destination. Since Stuttgart has a reputation as a cultural city, reasons may include that inhabitants from other cities travel to Stuttgart for a weekend filled with culture or German business tourists visiting conferences or offices in Stuttgart. Another trend is that most source destinations are neighboring countries to Germany. There are also completely different source destinations. For example, USA is in second place. This could be business tourists or people that travel between the USA and the large American military base that is located in Baden-Württemberg. Further down on the list, countries like Japan, India and China appear. DMOs also conduct heavy marketing of Stuttgart in these countries, which will be shown later. The DMO Magic Cities also expects a positive development in incoming tourism from South Korea and China, since these are markets where Magic Cities especially promotes Stuttgart (Niestert, personal interview).

The business travel and short breaks markets, important markets for Stuttgart, have been particularly badly hit by the global financial crisis in 2009. For example, there are more restrictions on travelling for business men and women to keep costs down. (Interviewee 2, personal interview) Despite the crisis, tourism development in Stuttgart is continuously positive. It is believed that the largest increase in tourism this year will be due to inbound travel from Europe, which has a market share of over 75% in Germany (www.germany-tourism.de B). This also presents an opportunity for domestic tourism in

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Table 5 - Top source destinations in Stuttgart (presse.stuttgart-tourist.de B)

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2009 (www.germany-tourism.de C). According to research made by the GNTB, Germany scores highly as a value-for-money holiday destination (www.germany-tourism.de A), which is contradicted by the facts from the TTC report. This is even more important in light of the current financial crisis because sending out signals that your destination is cheap might indeed attract more tourists, which might also attract more tourists to a large city like Stuttgart.

4.3.3 DMOs promoting Stuttgart
This part presents selected DMOs that market Stuttgart: Stuttgart Marketing GmbH and Magic Cities. Interviews were conducted with these DMOs because of their marketing focus on Stuttgart. There are also other DMOs that were not interviewed, like Region Stuttgart Marketing- und Tourismus, which cooperates closely with Stuttgart Marketing GmbH and therefore is indirectly represented in the thesis, and the German National Tourist Board.

Stuttgart Marketing GmbH
Stuttgart Marketing GmbH is the official tourism partner of Stuttgart whose goal is to promote Stuttgart as a high quality tourism and economic location in the European and world wide competition (www.stuttgart-tourist.de E). Working with the motto “Everything from one source”, Stuttgart Marketing GmbH coordinates all services relevant to tourism. This includes leisure tourism as well as business tourism. (Interviewee 1, personal interview)

Magic Cities Germany e.V
Magic Cities Germany e.V. was founded in 1955 to promote city tourism in Germany. As of 2009, the association promotes ten cities, one of them is Stuttgart4. Since 1998, it is administered through the GNTB. (Niestert, e-mail interview) The goals and tasks of the association is to increase the tourist traffic and overnight stays in the member cities, to increase the awareness of the cities, to position the cities, to describe the manifold offers of the cities (especially in the areas of art and culture as well as lifestyle), to perform a know-how transfer within the community, to strengthen the position of the cities within German tourism and to have a close exchange in the areas of market research and benchmark studies. According to Niestert, the member cities can enter the market to a larger extent when collaborating with other German cities. (Niestert, e-mail interview)

4.3.4 Destination branding in Stuttgart

The unique selling points of Stuttgart
This part will describe the USPs of Stuttgart and provide some pictures of them. All USPs were mentioned by both interviewees from Stuttgart Marketing GmbH in personal interviews, unless otherwise stated.

- **Wine plantations** rarely exists in a city like it does in Stuttgart and provides a very scenic view of the city.

- **The car museums** of Mercedes Benz and Porsche are well-known all over the world and are popular amongst tourists.

- Stuttgart is known for its **festivals**: Stuttgarter Weindorf, where regional wines and food is served, Cannstatter Volksfest, the second biggest bier festival after

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4 The member cities are Hamburg, Hannover, Berlin, Dresden, Düsseldorf, Cologne, Frankfurt, Stuttgart, Munich and Leipzig.
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Oktoberfest and one of the biggest folk fests in Germany, and the traditional German Christmas market (www.tyskland-info.se D).

- There are three **mineral spas** in Stuttgart (Stuttgart Regio Brochure), which are known for its healthy characteristics.

- **Shopping and musicals** are also used in the marketing of Stuttgart. Stuttgart is the largest city in the region and therefore attracts not only tourists interested in these areas, but inhabitants from the region and neighboring federal states (Interviewee 2, personal interview).

- **The Viniculture museum** displays over 2000 years of wine history (www.stuttgarter-weinwanderweg.de) and is interesting for the wine enthusiast. (Interviewee 1, personal interview)

- **Hiking trails** were mentioned as an USP, although this is more regional than specific for Stuttgart (Interviewee 1, personal interview).

The marketing campaigns of 2009 from the Stuttgart Marketing GmbH will focus on USPs like automobile, art, culture, mineral baths and wine. (presseservice.stuttgart-tourist.de B)

**The image of Stuttgart**

Stuttgart is promoted through key concepts such as *Full of the joys of life, green city, art and culture, architecture, cars.* (Interviewee 1 and 2, personal interviews). These are characteristics that have been used to describe Stuttgart for a long time, which is why
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Stuttgart tries to maintain this image rather than to change it. (Interviewee 2, personal interview) Meanwhile, Magic Cities promotes their cities differently, depending on which city it is and where they are going to promote it. For example, the marketing of Stuttgart focuses on different aspects in the target markets, such as USA, China and Korea. Still, all promotion material is retrieved from Stuttgart Marketing GmbH, which tells Magic Cities what to promote and then they perform this task. A common plan of action is made each year, where new focal points are decided upon. The choice of these depends on the target market where Stuttgart will be promoted. (Niestert, personal interview)

However, a destination image is not only created through DMOs, but is shaped by associations made with the city. A study by the German market research company Indicatus and the Stuttgart university came to the conclusion that although Stuttgart used to be known as a car city, it has also become known as a culture and shopping metropolis: culture was mentioned more often by inhabitants and tourists than companies from Stuttgart. It is believed that attractions such as the Kunstmuseum and Porsche museum moulds this image more than the destination's economical strengths. The respondents in the study also mentioned Stuttgart as being an attractive shopping city. However, this answer might not be surprising as the study was conducted in the inner city. (www.stuttgarter-zeitung.de) Moreover, adjectives such as clean, upcoming and cosmopolitan, rich and beautiful were used to describe the city. (www.stuttgarter-zeitung.de) However, only one third of the participants were not from the Stuttgart region. Therefore, a stroke of local patriotism might have a large influence on the answers. Other studies confirm that Stuttgart is generally perceived to have a high life quality and being an attractive business location. However, a study by Demoscopy Allensbach from 2008 showed that words that described a sense of well-being did not receive a very high score by people and companies outside the region. The lack of emotional appearance to the population was mentioned as a reason for this. (presseservice.region-stuttgart.de A)

Target groups in Stuttgart
Stuttgart Marketing targets individual tourists as well as groups. The tourists in Stuttgart can be divided in three groups of relatively equal size: Congress and conference tourists, Leisure tourists and Trade show visitors. These groups each make up one third of the total amount of tourists that come to Stuttgart. (Interviewee 2, personal interview) Interviewee 2 said that the congress- and conference tourists are their most important tourist group. This is also interesting since Stuttgarters see their city as economically strong. Despite this, when asked about who their target group is, Interviewee 1 says everyone, and that they want to satisfy all tourist needs (Interviewee 1, personal interview). Upon the question whether or not this might be a disadvantage, Interviewee 2 explains that their advantage lies in the fact that Stuttgart is a manifold city with something for everyone. Rather than attracting the visitor to their offer, they adapt the offer to the visitor. This might be designing evening programmes for congress- and conference guests and journalists. A concrete example of adapting the offer to the visitor is that Stuttgart Marketing presents different sides of Stuttgart in different ways in different countries. For example, Stuttgart is marketed as a destination with a friendly, warm and welcoming atmosphere towards people from Spain, whereas it is marketed as a great shopping destination towards Russians. (Interviewee 2, personal interview) Interviewee 1 says that they are thankful for every guest and that they target individual and group travellers from every country. When asked how they try to work around the fact that having everyone as a target group might be negative, she says that people have

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5 Famous companies from Stuttgart include Bosch, Daimler and Porsche
different interests and therefore they try to market the various offers to the people rather than to attract people to a given offer. (Interviewee 1, personal interview)

**Marketing channels used to promote Stuttgart**

Aside from their official webpages, Stuttgart Marketing GmbH and Magic Cities produce brochures, which are sent out to travel organizers and tourists all over the world. Some are sales guides with specific information about hotels and package offers, whereas some are aimed at the individual tourist. Examples of such brochures include information about city tours and sightseeing attractions in the city. For Stuttgart Marketing GmbH, Interviewee 2 also mentioned the “i-Point”, a digital information contact point with the purpose to serve tourists as well as inhabitants that can be found on the airport as well as in the city. It is considered to be an “important carrier of Stuttgart’s image” (www.stuttgart-tourist.de E) and gives the tourist information about the city, access to a map etc.

Magic Cities takes part in fairs, workshops and promotion tours in its target markets. Magic Cities also creates brochures and presentations for the different markets and conducts PR in the USA and China. They also organize yearly journalist and sales agent travels from the target markets to Germany. Moreover, Magic Cities promotes Stuttgart through partnerships with GNTB and their offices worldwide, as well as through representatives for the cities. (Niestert, e-mail interview)

**Logotypes used in the marketing of Stuttgart**

The logotype of Stuttgart Marketing GmbH refers to the slogan *Everything under one roof*<sup>6</sup> or *Everything from one source* in English. This refers to all the services that Stuttgart Marketing performs, from hotel reservations to ticket service and congress service. The image of the house originates from the official city logotype, which may be a reason why the interviewees could not explain the reasons why the logotype looks as it does. Stuttgart Marketing GmbH’s logotype only differs from the city logotype through the colored parts. Interviewee 1 used the word “positive” to describe it, because of the colors. She also mentioned that the logotype has received positive feedback from partners and customers, who perceive their logotype as friendly due to the chosen colors. (Interviewee 1, personal interview)

According to Niestert, there is no special thought behind their logotype. “It sounds good” was Niestert’s comment in the interview. She said that the logotype shows that there is a collaboration between the cities, but that each city still is individual and beaming like a star. The colors silver and grey have the effect of seeming noble. (Niestert, e-mail interview)

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<sup>6</sup> *Alles unter einem Dach* in German
Measuring success
For Stuttgart Marketing GmbH and Magic Cities, success is measured in amount of overnight stays (Interviewee 1, personal interview, Niestert, e-mail interview). Magic Cities measures this every month and divides it into source destinations (Niestert, e-mail interview). Stuttgart Marketing GmbH measures success through the common interest for their products, such as enquiries from group travellers (Interviewee 1, personal interview). Magic Cities also mentioned factors like the attention one gets in media, such as reports in foreign media and press (Niestert, e-mail interview).

The marketing of Stuttgart today and in the future
Stuttgart is surrounded by typical German tourist destinations such as Tübingen, Heidelberg, the Black Forest, Freiburg and Konstanz. These are typically smaller German cities with a lot of history that attracts many tourists. It is possible that tourists who also want to experience a city will visit Stuttgart, which is the larger city in the area except for Munich.

Partnerships can also be seen as an opportunity as such joint collaborations can make each part stronger in the marketing. Stuttgart Marketing GmbH cooperates with several companies as this is something that benefits everyone involved in terms of joint promotion etc. (Interviewee 2, personal interview) Interviewee 2 mentioned that the range of hotels that Stuttgart Marketing has a partnership with is large, as they want to have a fair and diverse range of offers rather than offering the standard hotels. In this way, Stuttgart Marketing GmbH are able to adapt their offers more. For example, through such cooperations, the StuttCard can now be offered to tourists. After paying for a certain time period of usage, the card gives the tourists reduced prices on entrance fees to museums etc. Although Stuttgart Marketing is an independent company, it also cooperates with the national GNTB. Interviewee 2 mentioned that it is important that everyone works towards the same goal, which is why the cooperation is close. (Interviewee 2, personal interview) At the moment, the partners of Magic Cities include the GNTB, Deutsche Bahn and Deutsche Lufthansa AG. The organisation is financed through membership fees from the cities as well as project-related support from the GNTB.

Moreover, Interviewee 2 mentions Stuttgart 21 as a main opportunity for Stuttgart as a city. This project is a rebuilding of the entire railway system, which will take several years. (Interviewee 2, personal interview) The Stuttgart main station will evolve into a transit rail station and ensures larger access to intercity rail traffic and regional traffic. Everything will be located underground and will create room above the ground for housing, green areas etc. (www.stuttgart.de) Through this, “Stuttgart will strengthen its central position in the long-distance travel network” (www.stuttgart-tourist.de C). Not only will the city be connected to more European cities, but it will also shorten travel distances substantially. The reconstruction will start in 2009/2010 and the planned implementation of Stuttgart 21 is planned for 2019 (www.das-neue-herz-europas.de). During this phase, they aim to make use of it by offering guided construction site tours, which will attract all kinds of people, especially people interested in architecture. The new Messe Stuttgart and the main airport also serve as opportunities for more tourists (Interviewee 2, personal interview).

As a difficulty, Interviewee 2 mentioned the current financial crisis. However, she maintains that the manifold attributes of the city puts a brake on the effect that the crisis has on the city. For example, many businesses face restraints such as no more over-night stays or less business travels. Therefore, the question is now how Stuttgart Marketing can capture more of the other type of tourists (such as leisure tourists). She mentions that as
the crisis goes on, people tend to travel more within their own country and thus expects more domestic tourism. (Interviewee 2, personal interview) Stuttgart Marketing hopes to benefit from the increase in German travellers as their destination might be cheaper than going abroad. Their relatively cheap exchange rate and the value-for-money position was mentioned (Interviewee 1, personal interview). This was supported by Ernst Hinsken, federal government commissioner for tourism, who said that “Germany is extremely well-positioned to generate strong demand, even in difficult times.” (www.germany-tourism.de A p.1) To avoid losing tourists, Interviewee 1 mentioned simply working harder and keeping in touch with tour operators and tourists (Interviewee 1, personal interview). Mentioning the global financial crisis, Klaus Lindemann maintained that it is necessary to present Stuttgart’s attractive and adequate offers more consequently and to ensure that there are enough reasons to travel to Stuttgart. This includes fairs, events, exhibitions, festivals etc. (presseservice.stuttgart-tourist.de B)

Lessons and recommendations on destination branding

Interviewee 1 mentioned that it is important to be aware of the USPs of the product and that these can be shown through attractive and informative brochures. Moreover, one should work directly towards the target group and be service-oriented. This can be done by training staff from travel agents and tour operators. It is also important to have a close cooperation with co-partners, like museums, restaurants and airlines. Furthermore, one should have knowledge about tour operators and networking is mentioned as an important recommendation. (Interviewee 1, personal interview) There should always be an exchange with the market, like the offices of the GNTB, organizers and key players (Niestert, e-mail interview). Moreover, one should not be afraid to try out different kinds of exhibitions and activities and see how other cities promote themselves and do their work. (Interviewee 1, personal interview) Making sure that market research is an important part of the work and making a new evaluation of the market every year were also points that were highlighted (Niestert, e-mail interview).

Co-operation is another important point that can be concluded from the interviews. Through close cooperation with Regio Stuttgart Marketing, attractions in the region can be jointly promoted with Stuttgart Marketing GmbH. (Interviewee 2, personal interview) For Magic Cities, the possibility of working together on the markets bundles up financing and manpower to stand up to competition from other countries. Niestert also mentions the financial crisis, which has had a large influence on the business tourism income, as well as cut downs in budgets and employees. (Niestert, personal interview)
5 Analysis

This chapter will examine the empirical data in the light of presented theories and will focus on what can be learned from the case studies.

As Buhalis underlines, it is important to have an understanding of the current situation in the destination to be successful in destination branding. The TALC model will be used to create a better understanding of where the destinations stand today. The concepts of comparative and competitive advantages and the integrative model by Ritchie and Crouch will highlight the advantages and disadvantages that influence the destination’s competitiveness. The destination branding methods will then be discussed leading up to general and specific recommendations on how to become more successful in the branding of a destination.

5.1 Applying the TALC model
This section will describe all three destinations separately. The figure below shows the current positions in which the destinations can be found.

![Figure 22 - Applying the TALC model](image)

5.1.1 Brussels
Applying the TALC model on Brussels, it seems possible that Brussels is in either the Development, Consolidation or Rejuvenation stage. The destination has clearly passed the Exploration and Involvement stages as the number of tourists are substantial with established tourist facilities such as hotels, restaurants, airports, etc. One could argue that Brussels is in the Development stage with growing tourist numbers, however, if you look at the next step Consolidation, stating that the destination is part of the tourist industry and the rate of increasing tourist numbers is declining we feel that the Development stage, as well as the Consolidation stage have been passed. Brussels’ tourist figures are still rising arguing that the city is not in the Stagnation or Decline stage of the model. That leaves us with the Rejuvenation stage, which points out attempts to relaunch the destination by providing new facilities such as new hotels, to attracting new target markets. Concrete examples are the opening of new hotels in the city and the renovation of the Congress Center (Vrydag, personal interview). One could, however, argue that Brussels is still in the Development stage, but since the destination has been known for such long time, we argue that Brussels is in the Rejuvenation stage. This conclusion tell us that Brussels needs to work hard to secure its desired position as a...
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destination not only for sophisticated travellers, but also among young and trendy people.

5.1.2 Istanbul
Looking back at Istanbul’s glory times as the capital of the Ottoman Empire, one can argue that Istanbul is now at a Rejuvenation level and has gotten a “second chance”. However, when looking at the development of the tourism sector in Istanbul in recent times, it can also be argued that Istanbul is at the end of the Development stage. This is justified by the fact that Istanbul has seen a significant climb in the number of visiting tourists, which is typical for a destination in the Development phase. However, national and international companies already provide up-to-date facilities. Moreover, the appearance of Istanbul has changed to a modern oriental city offering its visitors diversity (Rydn, personal interview). Hence, we maintain that Istanbul is entering the Consolidation level. Just as the MoT in Ankara states, Istanbul has become part of their destination marketing plan and is today a part of the tourist industry in Turkey. The tourism business in Istanbul is well-established and has created opportunities for the local industry. However, Istanbul needs to address the environmental, political and organisational problems within the MoT to have a sustainable and prosperous future.

5.1.3 Stuttgart
Discussing in which stage a destination is positioned is a complex task involving many factors. Stuttgart can be said to be a mature city in Consolidation stage due to its long history as a visited city, although the steady increase in tourist numbers and growing hotel investment in Stuttgart implies that the destination is in the Development stage. Moreover, investments like the Stuttgart 21 project will ensure more tourists in the future due to the shorter travel lengths to other major European cities. Moreover, the image of the destination is still evolving from a car city to a city that also offers culture and shopping. Hence, Stuttgart is establishing itself as a short break destination. Being in the Development stage means that Stuttgart still has some time before it is an established destination. For Stuttgart to become a consolidated destination would imply being recognized as a city and that there is a clear destination image in the visitor’s mind. However, the next stage, Stagnation, would not describe Stuttgart accurately either. For example, the number of visitors is not declining, although Stuttgart has an established tourism industry.

5.1.4 Criticism of the model
We are of the impression that the model is better suited on a resort destination such as Mallorca or Ibiza. As was seen while discussing the TALC model, it is difficult to assign the stages to the destinations studied. For example, it was difficult to completely determine if Brussels is in the Development or Rejuvenation stage, if Istanbul is in Development or Consolidating stage, or if Stuttgart is a developing or stagnating destination. Moreover, it is more likely that destination branding is a constant process where you have to keep up with market changes and re-evaluate your position as a destination among competitors. Furthermore, the position of the destination does not depend on the number of tourists, as is described in the model. We are of the opinion that these stages are not applicable on all destinations, and that destinations can skip stages and go back and forth. Therefore, it has been difficult to apply this model on our destinations. However, the value of the model is that it makes you think of the position of the destination and where it stands today so that you can properly evaluate the situation of the destination in order to promote it better in the future. Since it is important to know your city in order to promote it efficiently, models should be developed or modified for different kinds of destinations such as cities, regions and nations.
5.2 Destination competitiveness

Authors have mentioned that being successful as a destination is about using the comparative advantages efficiently and creating competitive advantages to differentiate it from other destinations. As a result, the destination will be sustainable in the long run. The destinations will thus be analysed through the concepts of comparative and competitive advantages and the integrative model to identify strong points and problem areas leading up to recommendations for successful destination branding.

5.2.1 Brussels

Brussels has a comparative advantage in its location in Western Europe with short distances to major European cities, which is promoted as one of the USPs by the DMOs. Other comparative advantages include historic places such as Grand Place and Palace de Justice. TTC mentions that Belgium as a country has competitive advantages such as the ground transport infrastructure and cultural resources, which has a lot to do with the pre-requisites of Brussels. Hence, Brussels is important in creating these competitive advantages for the country as well as the city itself. Belgium’s competitive advantages include a substantial ground transport infrastructure and cultural resources such as comic strips. Due to international institutions and companies such as EU, NATO and lobbying groups, there are many highly educated people from all over the world in Brussels. Hence, Brussels’ competitive advantages include its multicultural environment and rich human resources.

The combination of Brussels’ comparative and competitive advantages has made it possible for Brussels to differentiate itself to the visitor in many ways. In light of the empirical data, the destination is known as a political city. Still, it provides unexpected aspects such as the nightlife that attract the younger target group. However, the need to become better in promoting these sides is prominent. The slogan Your European Village used by BITC tries to convey that Brussels is not only a travel destination, but a place where you want to live because of its friendly international atmosphere. This kind of strategy is mentioned by Paskaleva-Shapira as a factor influencing the success of the destination. We maintain that the work possibilities make Brussels an attractive place to stay for a shorter time, but perhaps not in the longer run.

Belgian politicians are heavily involved in destination marketing and there is a general strong political will to promote tourism in the country. However, Vrydagh mentioned politicians as a possible obstacle to the work of DMOs and referred to the clash in opinions regarding the slogan Your European Village. Hence, Brussels is good in the stage Supporting factors and resources in the integrative model because of the strong political will and previously mentioned infrastructure. Brussels also has Core resources and attractors through its mix of activities and events for tourists and inhabitants. Considering the theory it is also important to reach the third stage in the integrative model in order to become a competitive destination. The destination management of Brussels enhances the appeal of Brussels core resources through the promotion of relevant USPs that are also the competitive advantages of the destination. This is aided by the focus on target groups such as City breakers and Cool people. Hence, although the DMOs have a well-developed vision of the destination, different visions and goals for DMOs and politicians are prominent. This can be seen already through the fact that DMOs focus on Brussels and/or merely the regions. This clash in vision, as well as the clash between politicians and DMOs, can be argued to be factors that impede the further development into a competitive destination. We claim that the qualifying and amplifying determinants of a destination determine the long-term competitiveness of the destination. Although the location of a destination is constant, many of the other
determinants can be influenced to a certain degree in the long run. The location of Brussels ensures the future inflow of tourism because it is well-connected to major European cities. However, it is crucial to maintain the awareness of the city and nurture the image of the city to make sure that the location is still a relevant determinant for the future competitiveness of the destination. The partnerships that the DMOs have with railway companies such as Thalys and TGV, that were mentioned by Vrydag, assist in maintaining awareness of the city and its location. The awareness of Brussels is currently high, but the image is relatively constrained by features such as political institutions that to some extent can impede its future image development.

5.2.2 Istanbul

Istanbul has many comparative advantages due to its location on the Bosphorus with one foot in Europe and one in Asia. The cultural resources are also prominent for Istanbul with the large number of historic buildings. The competitive advantages of Turkey mentioned by the TTC include architecture, cultural resources and the prioritization of travel and tourism. These are reflected in Istanbul where most of these features are promoted as USPs. Moreover, Rydin mentioned Istanbul’s position as a financial center in Turkey and an important hub in the region as competitive advantages that contribute to the continuously positive development in tourism figures.

An important supporting factor and resource mentioned by the MoT is the hospitality of the inhabitants in Istanbul and political will to promote the city. However, the infrastructure is poor in comparison to other cities in terms of public transportation and makes it difficult for tourists to get around. Furthermore, it can be a factor that makes it less attractive to live in Istanbul. Istanbul has strong advantages in its core resources and attractors such as its climate, history and culture, not to mention the mix of activities including the nightlife. The destination management enhances the appeal of these resources by promoting them as USPs. However, DMOs in Istanbul suffer from organisational problems due to the strongly centralized system where MoT controls the promotion of Turkey and its cities. The centralized system also impedes the possibility of taking local decisions about target markets and promotional activities. Moreover, the interviewees Balci Fisunoğlu and Celik mentioned the need of an organisation that coordinates the activities between DMOs and ensures stronger connections between DMOs.

Crisis management is important for Istanbul due to terror attacks. Hence, safety and security are important areas for Istanbul and the MoT has developed an action plan in case of a crisis. This shows that crisis management is taken seriously by the government and local actors, which is important to convey to tourists to give them a feeling of safety. The policies of DMOs in Istanbul are to increase the number of visitors. Celik even mentioned the goal of becoming a big tourist destination comparable to Paris. Istanbul also wants to have the right kinds of tourists and continuously monitors and evaluates the market and their own strategies to achieve this goal. The location of Istanbul is a factor that also in the future will qualify Istanbul as an attractive tourist destination. It offers living and experiences for different budgets, which gives the destination an advantage that ensures its future competitiveness. The awareness of Istanbul as a travel destination is high although anonymous in the way that people are not aware of details concerning the location, such as what it actually has to offer tourists.
5.2.3 Stuttgart

The main comparative advantage of Stuttgart is its natural resources such as the vineyards that grow everywhere in and around the city and its location by the Neckar river. However, the area around the Neckar could be used more efficiently by providing facilities that attract tourists and local inhabitants.

Stuttgart has a well-developed infrastructure despite its modest size and cultural resources including several theatres, operas and museums. Stuttgart has many competitive advantages through the creation of value-added activities such as exhibitions in the museums, famous theatre plays, operas and ballet performances by the Stuttgart Ballet. Human resources are also important competitive advantages for Stuttgart with its position as a high-tech industrial city.

As a supporting factor and resource, the infrastructure can be mentioned again. The authors also noticed the enterprise factor with the large amount of companies that exist in the city as well as the region is another supporting factor and resource. The core resources and attractors consist of the mix of activities such as the many festivals and events that take place in Stuttgart. We think an idea might be to promote vineyards as Stuttgart is one of few cities that has vineyards centrally located in the city. Possibly, other USPs that enhance the image of being festive and friendly are more important to the visitors and hence promoted through the destination management. It is also possible that DMOs do not consider vineyards to be a USP that is specific and selling enough. Although Stuttgart is promoted as a city for everyone, we claim that there is a lack of promotion of activities for younger people in the marketing. Hence, there are core resources and attractors that are not included in the marketing campaigns, which we believe shows a lack in destination management. On the other hand, the organisation seems to be well-developed within the DMOs and collaboration is high. For example, Stuttgart Marketing collaborates with Stuttgart Regio to promote the city as well as the region. Moreover, promotional material that is used by Magic Cities is provided by Stuttgart Marketing, which ensures the communication of a coherent image created by the DMOs. The vision of the DMOs in Stuttgart is to promote the destination as a manifold destination that offers something for everyone. However, we question this vision as it may not position the destination accurately with the result that Stuttgart loses itself into the crowd. The qualifying and amplifying determinants of Stuttgart are the central location and its importance for the region as the state capital of the federal state Baden-Württemberg. However, the city is one of the most expensive in Germany and is thus not a city for everyone, e.g. price-conscious tourists. The awareness of Stuttgart is high, mainly due to international companies in the automobile and high-tech industries. The reputation as a car city is still highlighted by the DMOs in the promotion of Stuttgart, e.g. through the Mercedes Benz Museum and the Porsche Museum. However, it is not known as a typical tourist destination and awareness in this area needs to be increased. The promotion of USPs that do not include cars have been important in this process.

5.2.4 Conclusions about destination competitiveness

As mentioned by Ritchie and Crouch it is important that a destination is developed with sustainability in mind. Brussels’ strong economical and political environment contributes to the sustainability of the destination. However, the lack of common goals and a coherent image might make it difficult to become competitive and sustainable in the long run. Istanbul needs to take the ecological aspects into consideration in order to be able to compete with other destinations. Even though the city is culturally and economically strong, the city can not be sustainable in the long run if the ecological
problems are not dealt with. The position as a state capital contributes to the strong economical and political environment in Stuttgart. The development and promotion of cultural features is one of the steps that the destination has taken to become more sustainable in the long run. However, without a clear vision of where the destination will stand in the future, and thus a relevant image the destination can not maintain competitiveness in the future. Thus, we can conclude that the destination needs clearer goals and target groups.

5.3 Destination branding methods

In this section, the destination branding methods mentioned by selected DMOs and authors in destination branding will be analysed to identify strong points and problem areas of the marketing strategies and methods, ultimately leading up to recommendations for improved destination branding for each destination.

5.3.1 Destination identity

As Govers pointed out, it is crucial to stay true to your destination identity when promoting the destination. Moreover, a destination must only promise what it can fulfil. We are of the opinion that the destinations studied have succeeded in this matter. Despite the monotonous impression created by the EU-institutions, Brussels is progressing with its aim to also promote its international features, such as the multicultural environment, which offers an interesting travel experience for the sophisticated visitor as well as for young and trendy people. Istanbul promotes its rich historical heritage as one of the strongest USPs, but still manages to make its diverse and exciting features known. Stuttgart also stays true to its destination identity through promoting its manifoldness in cultural events and activities. As mentioned by Knox and Bickerton, competitiveness is about understanding the current identity as well as the future vision. DMOs appeared to have a good understanding of the image that their destinations hold today and what they aim for in the future. However, our opinion is that these cities all need to become destinations that are more clearly defined in the visitor’s mind. Being aware of your destination identity is essential in order to project it truthfully and successfully through the activities of the DMO. Hence, our recommendation is to always have this in mind when conducting destination branding.

5.3.2 Uniform destination image

According to Anholt, a destination must come to stand for something, otherwise the destination will have a small chance of being remembered for long enough to be competitive. At the same time, many other authors have underlined the importance of not creating unrealistic expectations, as this may hurt the image of the destination in the long run. Therefore, we claim that it is of great importance that each customer touch point in a destination is coordinated in order to project a uniform image of the destination. The destinations that have been studied in the thesis suffer from somewhat unclear images, but seem to promote relevant USPs or concepts of the destination. This can be aided by the use of public media and other external agents, since they usually have a bigger impact and are seen as more reliable than destination-originated information.

Most DMOs mentioned that they either have media as a target group (e.g. BITC and MoT) or frequently invite journalists to promote the destination (Stuttgart Marketing, Magic Cities). Thus, it seems as though DMOs have realised the importance of media attention in aiding the creation or maintenance of an image. Both BITC and TF in Brussels use this marketing channel to convey the desired image of the destination by inviting journalists to Brussels to write about the city and by providing material to media. However, when looking at the way Brussels is promoted, there is no uniform image of the destination provided by DMOs. The three DMOs promoting Brussels all use different themes and
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images to promote the destination. BITC wants to sell Brussels as a *European Village*, OPT promotes Brussels as the *entrance door to Wallonia*, whereas TF conveys Brussels as an *art city*. It is clear that a lot needs to be done in order to convey a uniform destination image.

The DMOs in Istanbul, on the other hand, project a uniform image of Istanbul and are coherent in their use of marketing channels. Istanbul is described as a historic and a diversified city, which works as a bridge between East and West. This seems to be an appropriate image for Istanbul, since it conveys the destination’s true values and is sustainable in the long run.

Stuttgart Marketing tries to maintain and nurture their image through a close cooperation with its stakeholders and the material that they send to Magic Cities to promote the destination as a cultural and manifold center. As Anholt maintains, a DMO must remember that reputation is a valuable asset, which has to be protected and nurtured over the long run. In our opinion, this highlights the importance of projecting a uniform image to create a positive reputation.

5.3.3 Differentiation

Differentiation is of great concern to DMOs when building a competitive brand. We claim that the most effective way to do this is to promote the city using USPs, since these are a product of the destination’s comparative and competitive advantages.

For Brussels, the heavy impact of the EU and NATO institutions can be an advantage and a disadvantage when promoting Brussels as a destination. These political institutions contribute a lot to the attention that Brussels receives in the media, making it well known worldwide. However, we argue that this also can be seen as a negative point for Brussels since the connotations to Brussels are so closely tied to the political power and bureaucracy. As Buhalis mentioned, a reputation can make it difficult for a destination to change or influence its image. The DMOs in Brussels need to turn the political aspect into a positive thing when promoting Brussels as a destination. DMOs can also promote the non-political and multicultural aspects to attract their desired target groups. For example, Brussels is currently emphasising the marketing themes comics, architecture, fashion, design and being the capital of Europe. Brussels has named year 2009 to the “Year of the comics” to heavily emphasize this USP. King claims that emphasis should be put on the creation and promotion of holiday experiences, which link key brand values and assets like climate, culture, food and wine. Therefore, our suggestion is that Brussels put even more emphasis on showing what the city has to offer for leisure tourists. Short-break packages and other bundled travel experiences are examples of where specialisation could be made to differentiate the destination from its competitors. Another way of attracting more visitors can be to catch the interest of the business travellers’ families so that they will join the business trip and stay a few more days to explore the city.

For Istanbul, the most promoted USP is the historical heritage of the city. Dimance claims that a destination must provide overall attractiveness and quality experiences that are equal or better than those of the alternative destinations for its target markets. Not many destinations can offer the kind of experience in terms of historical sights that Istanbul does. However, Istanbul has more to offer than its history, which is why USPs need to be diversified: factors such as Turkish food, shopping for all budgets and the Istanbul nightlife could be promoted more to attract the target groups *Young people* and *Frequent travellers*. Just as in the case of Brussels, promoting the leisure aspect of Istanbul might result in business people bringing their family along or the decision to extend their business trip into a longer stay for leisure. Furthermore, Istanbul should
continue to advertise the fact that it is the only city in the world located on two
continents to remind people of this differentiating aspect.

Stuttgart has carefully developed USPs that represent the destination. The emphasis on
culture has helped Stuttgart to move away from the Car city-image. The development in
image, although Stuttgart Marketing claims that they have had their image for a long
time, is a consequence of the heavy promotion of other USPs, such as cultural USPs.
Stuttgart should, however, try to stand out by promoting the USPs more to not disappear
in the crowd of “cities with something for everyone”. For example, the vineyards that
grow in and around the city contribute to a uniqueness that could be brought more to
the foreground in the marketing in order to differentiate the destination and ultimately
attracting visitors. An increase in this comparative advantage could contribute to the
perception of Stuttgart as a green city. By promoting its USPs better, Stuttgart definitely
has a chance to become more successful in its destination branding. Although it might
be difficult to compete with cities such as Brussels and Istanbul, Stuttgart could try to
win more of the tourists that visit Germany or this part of Europe.

### 5.3.4 Target groups

Many DMOs claim to have everyone as a target group. However, Buhalis claims that
DMOs should consider concentrating on certain target groups because resources can be
used more efficiently when there is a focus. The DMOs in Brussels concentrate on a few
selected target groups, as they are of the opinion that it is inefficient to target everyone.
TF even admits that they do not have something to offer for everyone. Here the DMOs in
Brussels have clearly made a deliberate choice to target special groups in order to use
their limited resources more effectively.

The MoT in Ankara also concentrates on a few target groups that we think are suitable for
the destination. Talking to the local office in Istanbul and Stockholm and ICVB, they were
not aware of the target groups specified by the MoT, but claimed that everyone was a
target group. Despite the variety in activities, the poor infrastructure and the fact that
many activities in the city are inaccessible for people with disabilities or families with
children in strollers does in fact not make Istanbul suitable for everyone. Furthermore,
Istanbul does not offer an extensive range of museums, like many other cities, good
swimming facilities or the 3S, as Balci Fisunoglu and Tas mentioned. Balci Fisunoglu also
mentions that Turkey and Istanbul are popular destinations for Russian leisure tourists.
This has also affected the convention tourism and many Russians set up their conventions
in Istanbul. This is a positive development and the DMOs should work to get visitor from
countries that are over-represented as tourists for leisure to Istanbul to also set up
business meeting and conventions in Istanbul.

Stuttgart is a destination that claims to have everyone as a target group, which is
interesting since Kotler claims that trying to attract all travellers is a waste of money.
The destination is not, however, promoted to young people, which can be concluded
from brochures used in the marketing of Stuttgart. By actively choosing to exclude
young people from its main focus, more resources could be spent on business tourists,
who are already considered an important target group although they only constitute a
third of the total amount of tourists. Examples include focusing on attracting the
business tourists so that they will want to stay longer or come back to Stuttgart.
Alternatively, the DMOs could also decide to focus more on younger people in its
promotion to really have everyone as a target group. However, it must be kept in mind
that being able to concentrate the DMO’s resources more effectively will also lead to a
stronger impact on tourists in terms of image creation and positive word-of-mouth.
Buhalis mentions that a specific destination can only match certain kinds of demand and
that it is getting more difficult to determine travel behaviour and to segment travellers. Therefore, Stuttgart Marketing might have taken on too much trying to have everyone as a target group. Rather, Stuttgart should learn from Brussels in terms of focusing on certain target groups.

Kotler et al mentions the inhabitants and workers of a destination as an important target group. If they are satisfied with its destination, the success of the city’s destination marketing can be ensured. This is due to factors such as positive word-of-mouth. However, none of the DMOs in Brussels, Istanbul or Stuttgart mentioned inhabitants or workers as a target group in the interviews. When the DMOs mentioned everyone as target groups, they seem to mainly think of tourists. This impression was enforced by the further explanations made by the interviewees when talking about the target groups of the destination, where other nationalities and leisure tourists were mentioned.

5.3.5 Targeted offers
Authors like Buhalis and Kotler et al underlined that suitable offers should be created for each target group, e.g. through yearly marketing campaigns. Today, Brussels offers gourmet and lifestyle factors to the sophisticated traveller, but also a rich nightlife for young people, something that raises the competitiveness of the city. Brussels has named year 2009 as “the year of the comics” to heavily emphasize this USP, which offers a specific offer to a target groups. Istanbul offers its rich heritage to history enthusiasts, nightlife for younger people and shopping for all budgets. These range of activities suits most target groups by the MoT such as young, middle age groups and frequent travellers. People who are price sensitive, but at the same time keep product quality in mind might also get attracted by the shopping offers for every budget. For Stuttgart, Interviewee 1 and 2 mentioned manifoldness as a strong point to meet needs of all target groups, while promoting its various aspects to different target markets, such as the friendly atmosphere towards Spanish people and shopping possibilities towards Russians. Moreover, Stuttgart focuses on USPs such as mineral baths, art and wine for the marketing campaigns in 2009. However, Buhalis mentioned that since travellers are becoming more sophisticated and demanding, it is also becoming more difficult and important to raise the quality of tourism products to be competitive. Because of this, Ward mentions that it is important to develop several attractions to keep the tourism industry flourishing. Magic Cities promotes different aspects of Stuttgart, depending on the target market in which promotion activities are undertaken.

5.3.6 Customer dialogue
Authors such as Anholt, Blain et al, King and Pike have mentioned the importance of creating a dialogue with the customer is created. This can be done through extensive information on the website and the possibility for potential tourists to ask questions and get quick answers on questions regarding the destination. This dialogue needs to be followed up when the guest is at the destination; people involved in the contact with the tourists must give good and efficient service, as Interviewee 1 mentioned. The necessary training for this should be provided through the DMO or the government. Furthermore, we think that multimedia and other visual aids should be used to attract and interact with the tourists.

A dialogue with the tourist can be upheld by keeping information easily accessible for him or her. Stuttgart and Brussels have their tourist offices in central locations whereas the tourist offices in Istanbul are harder to find and old fashioned. Modern tourist offices should be placed easily accessible in the tourism areas in Sultanahmet and Taksim and distribute up-to-date information instead of mainstream brochures. To be considered a tourist-friendly destination, one should work on things such as translating tourist signs to
English. The fact that many tourists are not familiar with the local language, information signs in museums and attractions should be available in English in all three destinations. Despite the large number of English-speaking tourists visiting Stuttgart each year, we noticed that signs at museums are only in German. This can make tourists perceive Stuttgart as a not very tourist-friendly destination.

5.3.7 Logotypes and slogans
Blain et al. stresses the importance of a relevant logotype and slogan in destination branding, that convey the true values of the destination and what it has to offer, ultimately strengthening the brand awareness. In some cases, we find that DMOs should consider to evaluate the perception conveyed by their logotype and if it is worth the time and effort to redesign the logotype (detailed arguments will be provided for each DMO logotype). Even the manager for marketing and branding of BITC, Vrydaghs, mentioned the need to review the colours in the logotype, mentioning that warmer colours would better reflect the destination. We are of the opinion that the blue square can be seen as stiff, inflexible and conservative, but on the other hand also cool and relaxing. The eye is welcoming and can be seen as a hint of openness. However, one could also argue that the eye symbolises someone watching your step, which can give the tourist an uneasy feeling.

As for TF’s logotype, we are of the opinion that the pink colour gives the tourist a warm and welcoming feeling of the destination. An impression of a modern and contemporary destination is given, where the pink colour plays on fashion and modernity. However, the logotype does not really convey the feeling that it promotes a tourist destination, even the whole Flanders region. Some people might see the square as inflexible and conservative. The use of long-term slogans in the promotion of Brussels might be a good way to emphasize particular areas and strengthen the Brussels brand. Stuttgart, Istanbul and many other destinations use slogans, something we think the DMOs in Brussels should consider as well.

The Turkish logotype appears frequently in various contexts to promote Turkey as a destination. However, the logotype does not say much about what Turkey or Istanbul offer. The logotype conveys feelings of charter trips rather than city tourism. Moreover, if you do not know that the tulip originates from Turkey, it may seem strange to a potential visitor that tulips are used in the logotype. In contrast to Brussels and Stuttgart, Istanbul does not have its own logotype. This is interesting since logotypes are such an important part of destination branding, as mentioned by Blain et al. and Pike. To aid the creation of a strong brand image, we believe it is of high importance to create a logotype that reflects the true values of Istanbul. The Bosphorus plays an important part in the image of Istanbul, and we suggest that it should be used in a logotype and that one emphasizes the fact that it is the only city in the world located on two continents. Furthermore, the MoT updates its slogan every year and it could be evaluated whether or not this has a negative influence on the image of Istanbul or if it aids the creation and maintenance of the image.

The logotype of Stuttgart Marketing is based on the official city logotype and does not really reflect the destination identity that is conveyed in the colourful promotional material. Despite this, Interviewee 1 mentioned that they had received positive feedback on their logotype. We believe that this is more a comment on the brochures, however, that are more colorful and impressive than the logotype. Our suggestion is that Stuttgart Marketing develops its own logotype that conveys feelings such as Full of the joys of life, a concept commonly used in brochures. Furthermore, the logotype of Magic Cities could not even be explained by the interviewee but was described with the
words *It looks good*. Because of the importance of logotypes, Magic Cities should consider changing it so that the logotype more accurately describes the organisation and what it promotes. For example, the part *Magic Cities* surrounded by the stars could be bigger and the slogan should be removed in the logotype or made smaller.

### 5.3.8 Market research

That market research should be an important part of the work was mentioned by several interviewees. Also Kerimoglu and Ciraci mentioned the importance of market research, as this is a way of keeping up with the market and how demand for the destination changes. Both BITC and TF are conducting their own market research with strategic marketing plans to learn more about the potential visitors and how to attract them to Brussels. We are of the opinion that this information should be used in a better way to optimize the channels used, the target groups targeted and the activities conducted. The MoT conducts market research on their target groups in order to measure the success of their advertising campaigns. Furthermore, statistical information is collected to gain a better understanding of where and what the tourists come from and visit in Istanbul. We are of the opinion that Istanbul, like Brussels, should use the information to optimize their destination branding. For Stuttgart Marketing, marketing research is an important part of their work as mentioned by Interviewee 1. One recommendation is that Stuttgart Marketing uses the results of this market research to define target groups and market segments. Magic Cities also mentioned market research as an important part of their work and does a yearly evaluation of the tourist market, which we can notice in their well-developed marketing activities.

### 5.3.9 An overall goal

Anholt highlights that it is important for DMOs in the same destination to be aware of the overall goal in order to work towards the same goal. We maintain that DMOs in different levels should be able to influence the DMO activities locally where needed. The same information should always reach all levels of the organisation to keep the information flow transparent and to enable the ability to project a uniform image. Working together and exchanging information and experiences would make DMOs more efficient. However, the DMO must always remain flexible to be able to quickly adapt to internal and external changes. When interviewing the representatives from the different levels in the MoT, it became clear that several of the overall goals made by the head office in Ankara were not clear to the local office in Istanbul nor in Stockholm. Even the target groups set up by the MoT in Ankara were not clear to the local offices, whose representatives maintained that the target groups were *everyone*. Therefore, it is crucial that everyone in the organisation is aware of the overall goals in order to be efficient. In our opinion, having clear target groups makes it much easier to create a clear and efficient marketing strategy.

### 5.3.10 Coordination of activities in a destination

Not only is cooperation between DMOs of importance but also the coordination of activities in a destination. As Anholt mentions, a coordination of activities and gathering around a common vision is crucial to successful destination marketing. If DMOs cooperate, for example through common marketing activities and campaigns, the result should be more efficient campaigns attracting more tourists. The coordination of activities can also involve the common funding of various campaigns to strengthen the impact of their activities, entering private-public partnerships and involving the whole society. Our interviews and research have shown that the DMOs working to promote Brussels have clear aims with a good and carefully planned structure within the organisations. However, the three DMOs promoting Brussels are not cooperating with each other and coordinating their activities to achieve a greater impact, thus attracting more tourists. It seems to be difficult to put this vision into practice, since the DMOs are
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responsible for different regions with similar, but not the same, goals. This is still something that both Nijs and Vrydagh would like to see.

Although several DMOs promote Istanbul, Balci Fisunoglu and Celik maintained that Istanbul is missing a central organisation that coordinates activities and lets the DMOs take local decisions that are better suited for their respective markets. Representatives from all DMOs or the MoT should together found an organisation that could work for the interest of all the DMOs and coordinate the work. The difficulty lies in coordinating these activities successfully.

Stuttgart Marketing is a good example of where activities are coordinated within the destination. This is aided by the fact that there are only two main DMOs in Stuttgart. Hence, it becomes easier to perform joint marketing and other activities. However, the coordination of activities can be made difficult due to the lack of available resources of the DMO. We asked ourselves if Magic Cities’ organisation is effective enough when it only has one office with one employee. As an example, the interview with Niestert was delayed because she had a vacation for 14 days, thus the office was completely closed. Moreover, phone calls were often not answered which is likely a consequence of having only one employee responsible for many job tasks. On the other hand, that coordination between DMOs in different levels is important can still be exemplified by Magic Cities e.V. Although the DMO promotes more cities than one, Niestert mentioned that collaboration enables the cities to enter new markets to a larger extent when done together, rather than alone (personal interview). Moreover, the work is made easier since marketing material is retrieved from each city for the further processing of Magic Cities.

5.3.11 Learning from other DMOs
Buhalıs is of the opinion that competing and complementary DMOs need to cooperate and learn from each other. This was also mentioned by interviewees, such as Interviewee 1 (Stuttgart) and Vrydagh. Vrydagh is for instance a board member of the Destination Marketing Association International, an organisation with representatives from DMOs all over the world. He maintains, however, that the problem in this organisation is to cooperate at the same time as the members are competitors. Through Vrydagh’s engagement with DMAI, BITC is trying to learn and change experiences with other destinations on how to conduct promotion of destinations.

5.3.12 Cooperation between DMOs and stakeholders
Cooperation between DMOs and other stakeholders is also of great importance when promoting a destination, according to Buhalıs and Elbe et al. All three DMOs in Brussels cooperate with hotels and other stakeholders. However, this cooperation should be strengthened and perhaps even expanded in some cases. The DMOs in Istanbul cooperate both with private enterprises as well as governmental organisations on all levels. However, the MoT, which is the tangible organisation promoting Istanbul, is too centralized and a reconstruction of the organisation would probably benefit the tourism industry in Istanbul. Stuttgart Marketing cooperates with several companies and believes that this benefits the DMO, as this is one part of stakeholders and the destination working in the same direction.

5.3.13 Influencing the political agenda
Since tourism is an important source for economic growth, Kahn claims that DMOs need to use their position to influence decisions that require political decisions. Anholt argues that a DMO can to a certain extent influence the overall development and improvement of the destination. However, the DMO is often constrained by its financial resources. In Brussels, the local authorities are heavily involved in promoting the
destination, which shows that the politicians have realised the importance of tourism for Brussels. Moreover, there is a disagreement between politicians and BITC who want to promote Brussels in different ways. It is important that the DMOs and the politicians can agree about these things in order to successfully convey a uniform image of Brussels. In our opinion, Istanbul is in need of a better infrastructure. For instance, the public transportation system should be extended and more convenient to use, and this needs to be initiated by the government. Rydin maintains that the bureaucracy and the dissonances between the big political parties cause problems for the tourism industry. As an example he highlights the fact that several low flight carriers are prohibited to establish on the Turkish market because of restrictions. Here it is crucial that DMOs, stakeholders and politicians keep an open dialogue. Politics and politicians were not mentioned in the interview with DMOs promoting Stuttgart.

5.3.14 The importance of human capital
As mentioned by Ritchie and Crouch, involving the local population may include the development of human capital in the destination, socially as well as business-related human capital. Brussels scores high in human capital and DMOs should consider how to use this to attract tourists. Turkey reached place 44 out of 133 in human capital in the TTC report. Educating and training people within the industry should be in the interest for especially the MoT. Interviewee 1 (Stuttgart) mentioned the training, or rather informing, of staff from travel agents and tour operators, as well as the importance of service-oriented staff as important parts of developing human capital.

5.3.15 Future possibilities and challenges
Moreover, destination branding also involves the long-term development of the destination. It is therefore important to consider future possibilities and challenges for the destination.

Since the EU is growing with increasing importance in the world, and since Brussels has the headquarters of the EU and NATO, we see a bright future for the city with an increasing importance of the city in international relations, economics and politics. Brussels has had problems in transportation and infrastructure since the traffic has increased rapidly. The location and the good express-train infrastructure are big advantages and a good opportunity to attract visitors. Amsterdam, Paris and London can easily be reached with express trains.

Once successfully addressing the environmental problems Istanbul is facing, the city can become more attractive. However, Rydin believes that environmental sustainability will become very important in the future for destination marketing, a field where Istanbul is far behind Brussels, Stuttgart and many other European cities and might hinder the development of the tourism industry. Building up a sustainable public transportation system is a step in the right direction to a better environment in the city. The DMOs should put more emphasize and pressure on politicians to introduce a more sustainable development or the city.

Although being a large city, Balcı Fisunoğlu maintains that Istanbul is a safe city. Because of internal and external political conflicts as well as terrorist attacks in the past, the safety precautions are higher and more visible for the visitors. Although political problems and terrorist attacks are out of the control for DMOs, Tasci and Gartner suggest a close cooperation with travel writers in an effort to utilize a strategic advertising tool and to help the process of creating a positive image of the destination. Today, the action plans that exist in case of a political conflict or terror attacks are well developed. However, these consist mainly of informing media and people correctly of the occurred event. The MoT already conducts PR travels for journalists and writers in order for them
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to write articles about Istanbul. We claim that the MoT might think about organizing similar trips after an occasion, which might have a negative effect of the image of the destination. However, it is difficult to see what DMOs could do better to protect the tourists. Informing and warning as well as keeping the security controls in major museums and shopping centres show that peoples’ security is taken seriously. In the long run, however, terrorism and conflicts might damage the reputation of the destination and affect the development of the TALC model. Stakeholders within the destination must work together to maintain the positive development of the tourism industry in Istanbul. However, as Ritchie and Crouch maintain, although a destination is facing political or economical problems, people will still visit the destination if it offers its visitors an experience that cannot be found elsewhere. Rydin says that Istanbul does offers its visitors a great experience and is the perfect destination for Europeans, since they will experience something new, but at the same time they can keep the high level of standard that they might be used to.

Future possibilities for Stuttgart include the positive development of incoming tourism from countries such as Japan, India and China. A large part of this group is likely business tourism. The current readiness to invest in Stuttgart reflects that tourism figures are believed to grow. The growth in tourism figures is partly a consequence of the Stuttgart 21 project, which will shorten the travelling times between Stuttgart and other European cities. Future challenges for Stuttgart include the global financial crisis, which has affected Stuttgart’s most important target group: the business tourism. Stuttgart Marketing tries to counter the effects by focusing on other target groups. The global financial crisis has probably affected all DMOs in different aspects. However, it was only mentioned in interviews with Stuttgart Marketing.

5.3 Summary of recommendations
The table below summarises the analysis above and gives clear recommendations on what DMOs in each destination should concentrate on. The mark x indicates that the destination needs to pay specific attention to this recommendation. Where there is no x for a specific destination, it has already implemented the recommendation in its daily operations. Where there is no x in any column, the recommendation is general for all DMOs worldwide.

<table>
<thead>
<tr>
<th>Recommendations</th>
<th>Brussels</th>
<th>Istanbul</th>
<th>Stuttgart</th>
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<tbody>
<tr>
<td>Stay true to the destination identity</td>
<td></td>
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<tr>
<td>Project a uniform image of the destination</td>
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<td>x</td>
<td></td>
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<tr>
<td>Differentiate the destination from its competitors</td>
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<td></td>
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</tr>
<tr>
<td>Concentrate on certain target groups</td>
<td></td>
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<td>x</td>
</tr>
<tr>
<td>Create sustainable offers for the right target group</td>
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<td></td>
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<tr>
<td>Keep information easily accessible for the visitor through customer dialogue</td>
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<td></td>
<td>x</td>
</tr>
<tr>
<td>Continously evaluate the logotype and slogans</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Conduct market research and use the results</td>
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<tr>
<td>Always be aware of the overall goal of the DMO</td>
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<tr>
<td>Coordinate activities between DMOs</td>
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<td>x</td>
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<tr>
<td>Learn from other DMOs</td>
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<tr>
<td>Cooperate with stakeholders</td>
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<tr>
<td>Try to involve politicians in destination branding</td>
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<td>x</td>
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<tr>
<td>Use the human capital in the destination</td>
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<tr>
<td>Be aware of possibilities and challenges for the destination</td>
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</tbody>
</table>

Table 6 - Summary of recommendations
6 Conclusion

This chapter will present the conclusions that have been made from the analysis and discussions. The aim of the conclusions is to reach an answer to the research question.

As can be seen in this thesis, destination marketing is a complex research field with many factors influencing the implementation, result and success of the destination marketing process. The aim throughout this thesis has been to learn how the chosen destinations are promoted in order to propose recommendations on how the destination marketing in these and other destinations can be improved.

Common marketing strategies that were mentioned by the interviewees include promoting relevant USPs, having the right image, the right target groups, conducting market research, and promoting the destination through public relations. The destinations face problems within their own organisations as well as in the relation to other stakeholders. Hence we can conclude that problem areas include organisational structure, cooperation and coordination, and a clear strategy to reach common goals. This has led up to the following recommendations for DMOs:

For Brussels, we recommend that the DMOs coordinate their activities in a joint effort to promote a uniform destination image. Since the DMOs are not coordinating, there is a risk that the development of the destination is not sustainable in the future.

For Istanbul, we recommend that the DMOs become more de-centralized so that decisions concerning target markets can be made closer to the target market. Furthermore, information for tourists should be more easily accessible.

For Stuttgart, we recommend that a focus on certain target groups should be developed in order to achieve greater success in attracting the “right” visitors. Moreover, the logotype of e.g. Stuttgart Marketing GmbH should be revised to provide a more contemporary image that reflects what the destination has to offer.

In general, we recommend that DMOs should always remember to stay true to their destination identity. A DMO should also make sure that its destination stands out by choosing USPs that are indeed unique to differentiate the destination. A way to differentiate a destination is through the use of logotypes and slogans, e.g. for the DMO. Therefore, it is important to continuously evaluate them to make sure that the right and uniform image is projected. Moreover, DMOs should concentrate on certain target groups and provide them with suitable offers. Market research is a vital tool in finding out about possible or existing target groups and their needs. Therefore, it is important that market research is analysed thoroughly and used. A DMO can also learn from its competitors, e.g. through inspirational marketing campaigns or efficient working methods. When it comes to implementing destination branding strategies and methods, the process can be eased by coordinating activities between DMOs on the destination levels. However, stakeholders, such as hotels and airlines, should not be forgotten. These are an important part of the destination and help in projecting the image. Politicians are also important stakeholders, because they set the boundaries for action e.g. through financing and affect the environment of the DMO. Therefore, it is important that the goals of DMOs and politicians are aligned. We also recommend that information is easily accessible for the tourist, which can be done by creating a dialogue with the customer. For example, a DMO should consider the use of visual aids in
promotion, the possibility of interaction through the destination web page and the location of the tourism bureau to reach the visitors. Activities in all DMOs should be planned with an overall goal for the destination as common ground. Lastly, the DMO needs to take the future possibilities and challenges into consideration. Only through the combination of an understanding of the past, current and future, can successful destination branding be achieved.

7 Suggestions for future research

In response to the complexity and the diverse nature of destination branding, there are several areas that could be investigated further. In this thesis 7 DMOs have been interviewed. However, at all destinations there are more DMOs that could be interviewed to get a broader picture of the destination branding in Brussels, Istanbul and Stuttgart. In our study we have sought to obtain different angles and DMOs working to promote the destinations. However, we have limited the study to DMOs although our initial purpose was to investigate the destination branding seen from the stakeholders and tourists’ perspective. We believe that this is necessary to obtain a complete picture of destination branding in the various cities and for the DMOs to get a broader view of stakeholders’ and tourists’ perception of the destination that is not just represented in numbers and facts. Local inhabitants are important people to spread the word, therefore it would be interesting to study the local inhabitants’ perception of the city they live in. Does this perception align with the one of the other stakeholders, the tourists and the DMOs? Do all stakeholders hold the same image of the city, or do they convey different images?

Furthermore, we believe that there is a need for further research on how DMOs in general but also in Brussels and Istanbul can work together to streamline the destination branding. Such a study could highlight whether it is more effective for the organisations to work together towards a common goal. Moreover, it would be interesting to examine the influence of word-of-mouth on destination branding.

We believe that the TALC model has shortcomings and is more suitable for analyzing resorts or islands. Today there are so many different destinations and not all are applicable on the model. We maintain that a model which clearly looks at the development in urban cities is missing. The current TALC model is built on the number of tourists on one axis as a measure of the maturity of the destination. We think this is a misleading indicator, since the development should not be measured in quantity, but rather on whether the the destination is visited by the right target groups etc.
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### Appendix

This part presents the interview questions that we used. Usually the questions were used as a base for discussion, which is why the structure and questions have been different in the different interviews. This is an example of the interview questions used in the interviewing process.

#### Information about the interviewee
- What is your name?
- What is your job position?
- What responsibilities do you have within the organisation?

#### Marketing the destination
- How have the ways in which you market your destination changed during the last decade?
- What are the unique selling points of your destination?
- Which image of your destination do you try to create?
- Are you trying to maintain or change the image of your destination?
- Are you cooperating with other organisations to attract visitors?
- How do you handle negative information about your destination?

#### Target groups
- Who are your target groups?

#### What channels are used to promote the destination?
- Which marketing channels do you use to promote your destination?

#### Funding
- How are the activities of your organisation being funded?

#### Logotype
- What logotype does your organisation use? Why was this symbol and these colors chosen?

#### Where does the destination stand today and what lies in the future?
- What are the opportunities and difficulties that your organisation faces?

#### How do you measure success in your organisation?
- Do you measure the success of your marketing efforts? How?
- What lessons have you learnt during your work?
- What are your recommendations on effective methods or practices?