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Marketing Mix and Tourism Destination Image: The Study of Destination Bled, Slovenia

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Background and Purpose: The aim of the research was to find out how business partners from the field of tourism estimate the dimensions of the image of Bled and the marketing mix used to promote Bled. Further on we were interested in evaluating the influence of image and marketing mix on the scope of sales measured in overnights. The following dimensions of image were explored: perceived uniqueness of image as a whole, perceived uniqueness of attractions and experiences, perceived quality of the environment (cleanness), perceived feeling of safety, as well as the dimensions of the marketing mix: perceived quality of products (accommodation, culinary offer, transfers, etc.), perceived price of services, perceived manner of sales for the promotion of Bled, perception of promotional channels, perception of residents (politeness, friendliness, multicultural and religious openness, etc.) and a positive experience of visiting Slovenia.

Design/Methodology/Approach: The survey was dispensed among 400 incoming agencies, foreign tour operators, tourist agencies and associations that promote the product of Bled. 235 units were received, 164 of them were completed. The respondents come from 30 countries from all over the world.

Results: The findings disclose how service quality, tourist provider competencies and environmental factors are estimated. Safety at Bled has the highest arithmetic mean and the lowest standard deviation. The lowest ranking is linked to traffic and tolerance towards other religions. It is alarming to find the service quality, as the core of tourism business, rated poorly during the main season.

Conclusion: Having overviewed the available literature it might be concluded that the analysis can be regarded as the first research of the tourist destination Bled performed in this manner and scope.

Keywords: *Bled; image; marketing*

1 Introduction

Literature overview of destination image and destination marketing shows that the topic has been broadly researched. However, the researchers rarely focus on the connection among the marketing mix, destination image and scope of sales measured in overnights. Our research focuses on this very topic. It tests the influence of (1) image and (2) mar-

keting mix on the scope of sales i.e. overnights in the tourist destination Bled. To rephrase the research question: we were interested to identify how saleable is the destination image of Bled and how the marketing mix might amplify sales. To what extent do the image and marketing mix affect tourism product sales? This question can be regarded as timeless, contemporary and always interesting.

The analysis of the world tourism trends (WEF, 2015)

places Slovenia with the tourist brand »I Feel Slovenia« and its corresponding strategy on the 8th position. The rating for the country image efficiency and the number of attracted tourists on the other hand substantially falls down to the 96th position. This clearly demonstrates that the image and the tourist brand are not capitalized to their full advantage and that the marketing and sales process is below the level of half of European rated countries.

Bloom Consulting's Country Brand Ranking© for Europe (2016) positions Slovenia's tourism brand on the 23rd place. The country brand strategy is rated 9th best in the world. This means that the messages / imagery promoted by the National Tourist Office match the most demanded tourism products, assets and activities searched for by potential tourists in search engines. Slovenia has shown a growth of 5% from 2014 to 2015 (Bloom Consulting, 2015) and it is now the second most searched for country in the world for "Spa"-related activities, being only surpassed by its neighbour Austria.

It is our assumption that the final sales result depends on both factors, namely the image as well as the marketing mix. Although MacKay and Fesenmaier (1997) claim that an image is of subjective nature, the goal of each marketing process, using advertising and other marketing tools, is to evoke a positive image with contrasting elements on several levels. The brand herein should play a supportive role.

Marketing specialists exert the destination image as the promotional tool for positioning the destination in the market and for exposing destination's competitive advantages (Hosany, Ekinci & Uysal, 2006; Morgan, Pritchard & Piggott, 2003). Other authors (Kotler, Haider, & Rein, 1993) basing on the example of London and other bigger cities prove that each marketed place, region or city had already been informally marketed by visitors, workers, investors and buyers centuries before their final market visibility. On the case of Bled that already celebrated the first millennium of being mentioned in written sources we could undeniable say that informal marketing started with the first pilgrims. Planned marketing with a broad use of marketing tools to enhance recognition has been used in the recent years. Developing a multidimensional and coherent image is of crucial importance for all East-European countries since the very image is the most influential factor when achieving better recognition and success (Szondi, 2015).

1.1 Tourism and tourist destinations

Tourism is one of the most prosperous and fastest growing economic branches in the world. Recent analyses show that the world tourism with 284 million employees (1 of 11 employees on average) forecasts a 3.5% growth for 2015, which is 1 percentage point higher than the world economic growth (World Travel and Tourism Council [WTTC], 2015). Tourism represents 9% of the world GDP, moreover,

the forecasts for 2030 with an annual growth of 3.3% show that the number of world overnights might even reach 1.8 billion. Traditional markets with Europe grow at a 2.2% rate and new destinations grow two times faster. Eastern Europe (that frequently includes Slovenia as well) shows a growth of 3.5% (World Tourism Organization [UNWTO], 2015). The growth of Slovenia's tourism has been recorded since its independence, and in 2014 results exceeded the level of 6 million tourist overnights. According to the records of WTTC (2016) the share of tourism in total gross domestic product should increase by 2.5%. Employment figures demonstrate a moderate growth; tourism currently provides jobs to 104,500 people. The outlooks of WTTC reveal that Slovenia should have a 4% future growth in tourism, which might result in 13.8% of the GDP.

In 1942 Walter Hunziker and Kurt Krapf scientifically defined tourism with a statement that tourism is a mix of relations and phenomena that stem from travel and living of foreigners in a certain place if that is not connected with permanent settling or economic activities (Planina & Mihalič, 2002). The world organization for tourism states that tourism comprises the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes.

A **tourist destination** can be epitomized as a managed tourist system with balanced relations among its participants and with a political consensus on a geographically defined area with sufficient natural and constructed tourist attractions, developed infrastructure, ability to create added value for its visitors and the ability to ensure sustainable tourism development. A visitor perceives its final goal of travel and such tourist destination as a complete unit i.e. complete tourism product with an added value (Semaja, 2011). The term of the tourist destination has been interpreted in many different ways, but the majority acknowledge that this is a coherent geographical region with uniform identity and various tourism products. A tourist destination has the appearance of an independent and competitive product (Kotler et al., 1993). Bieger (2000) delineates the tourist destination as a geographical region (city, area, and town) that a visitor or a tourist segment chooses for its travel goal. Smith (Hall, 2008; Konečnik, 2001) defines characteristic criteria of the destination, but acknowledges that the limits of destinations in reality are hard to define. According to his criteria destination should:

- include cultural, physical and social attributions that commonly define the regional identity,
- include tourist infrastructure to support the development of tourism,
- display more than one tourist attraction,
- include existing attractions or have the potential to develop interesting attractions,
- be able to support planned marketing of the tourist region,

- be available to a broader number of visitors.

1.2 Image of the tourist destination

The acknowledged definition of the term image states that these are mental pictures or mental images of an individual about something. The image can be contrasted with the identity. The identity is something that objectively exists, while the image is the subjective reflection of the identity. The subjects perceive the identity of an organization, an individual or an entity in a different way. It should be noted that an organization, an individual or an entity can have various images since there are numerous different individuals in the environment. Particular individuals might perceive the same identity utterly different. Theorists claim that an image is a set of person's beliefs, ideas and impressions with a reference to a certain object (Kotler et al., 1993). Crompton (1979) further on defines the image of a tourist destination as a structure of beliefs, ideas and impressions that an individual has about a tourist destination. Interestingly Gartner (1996) sees in the image of a destination three hierarchically connected components: a mental, an emotional and an impulsive one. The emotional component is also supported by Parentau (1995) who links the image to the favourable or unfavourable prejudice that the public has about products or destinations. Cohen, Evans-Pritchard, Morgan and Pritchard (in Brezovec: 2009) also add visual images due to the fact that they analyse the characteristics and the expressiveness of visual images (photographs, films, brochures, logotypes), and thus they open the dilemma whether a visual image reflects reality or distorts it. In the field of tourism the image would be mutually defined as an »imitation of an appeared object« or as a »visually marked identity of an object« (UNWTO, 2016).

More than 50 years ago theorists have shown that the destination image (as a combination of mental images, perceptions, opinions and impressions of an individual or a group) is the key factor that affects the decision, assessment and consequently the positioning of tourist providers (Brezovec: 2007).

We could interpret the destination image as the »mental imitation of an actual appearance of the tourist destination«. Thus we defined the research variables referring to the:

- perceived uniqueness of the complete image of Bled,
- perceived uniqueness of tourist attractions and activities in Bled,
- perceived quality (cleanness) of the environment,
- perceived safety.

1.3 Destination marketing mix

Marketing endeavours to understand the needs (as essentially existent in the human nature) and wishes (individuals strive for goods to satisfy their needs) of potential buyers. It affects the purchase power and aspires to create the demand that can be met with a tourism product. A user will not only feel satisfaction, but will also perceive the value that occurs as the relation between the benefits received and costs made. The next logical step represents the core of sales, namely exchange. This is a process that creates value and improves the position of both sides if a comparison is made to their positions prior to the exchange (Konečnik, 2010).

Theoretical basics of marketing need to be addressed as well. Harvard scholars were the first to introduce the term marketing mix with twelve different marketing elements (Dolan, 2000). Theoretical and practical inputs later led to the product marketing mix called 4P named after McCarthy with the following elements: product, price, place and promotion. Selling services further on led to additional 3P elements: people/ participants, processes and physical evidence. Marketing of tourist destinations added two more P elements: politics and paucity. Kotler, Bowen & Markens (2014) recently conjectured two further dimensions: internal and interactive marketing. The historic overview of marketing strategies exhibits a profound transformation in time (Kodrin, 2011):

- production (cheap products, productivity is of crucial importance) and product concept (practical products of high quality are preferred),
- sales concept (the user needs to be convinced into purchasing a service),
- marketing concept (the sense-and-respond philosophy should help us offer the proper services for users),
- socially responsible concept (sustainable, socially- and eco-friendly oriented services).

Kotler et al. (2014) persist that the goal of each business operation is to create and keep satisfied and profitable clients. Once their needs are met such clients will share their opinions and experiences with others.

Due to the »nature of a tourism product, which is a combination of services and products« (Konečnik, 2010) or due to the mix of physical products, services and natural or cultural goods (Alič & Cvikič, 2011) slightly altered marketing approaches need to be employed so as to achieve better results. Konečnik (2010) defines marketing in tourism as a »process of voluntary exchange among users and providers of tourism products / services / experiences where both participating sides should be satisfied. The providers are bound to offer products / services / experiences that give modern tourists the utmost experience. When providing experiences to specific user groups tar-

geted marketing combined with destination marketing mix should be used.

A client satisfied with the provided service is the crucial element of tourism. Satisfaction can be interpreted as the »level of personal satisfaction felt when a client compares the achieved with the expected satisfaction with using a product or a service» (Alič & Cvikl, 2011). Aside the two mentioned dimensions of the expected and the experienced; the quality of the service, linked to the fact by whom, when and how this is achieved, is the most important element. The adjusted elements of the marketing mix are hence the focal point of our research:

1. product quality (accommodation, culinary offer, transfers, etc.),
2. price of the service,
3. the manner in which Bled is sold,
4. marketing communication channels used to promote Bled,
5. residents (politeness, friendliness, openness to multi-cultural visitors and religions, etc.),
6. positive experience of Slovenia.

In the course of our research the following facts were adopted as guidelines:

1. It is indicative of tourism and hotel business that services are related to the experiential quality and the quality of trust. The latter has a high degree of subjectivity that makes achieving excellence even more demanding or less manageable, and more dependent on understanding each individual or each business entity. Consequently, we can talk about quality relativity (Marolt & Gomišček, 2005).
2. Uranc (Kodrin, 2011) claims that value is relative; »the value perceived by the users may not be equal to the one the providers feel they are giving. Users vary and so do their systems of values«. If we can recognize how users respond to the characteristics of tourism products, price and marketing, we can attain greater added value and get a favourable position when compared to other tourism providers.
3. Motives of reason and emotions drive a potential tourist into purchasing a tourism product. A need or a desire act as motivators towards an activity. The purchase behaviour in the end relies on psychological factors. The human need to purchase tourism services functions as drive, depending on the fact how each situation is perceived. It is not the reality itself, but the perception of reality affecting the person's purchase behaviour that is the most crucial.
4. There are different destination management models that define key factors as well as the prerequisites for establishing and managing a tourist destination. Semeja (2011) ranks the most relevant ones: the model of the Swiss Tourism Management Institute in Graubünden, Bieger's ITM model, the Ritchie/

Crouch model, the integrated model of Dwyer and Kim and Heath's model. Beritelli, Reinhold, Laesser and Bieger (2015) recently presented the St. Gallen model that introduces a new concept of understanding and promoting destinations. It is based on the fact that many service providers and other participants are not able to recognize the travel motives or habits of visitors.

5. Tourist services are always provided by people. As Kotler et al. (2014) recommend the service culture should commence in the top management and descend hierarchically. World tourism evaluates the importance of human factor regularly and the tourism competitiveness report for human resources of the World Economic Forum (WEF, 2015) reveals that Slovenia has the index 4.69, which is far below Switzerland that supremely leads with the index of 5.64 and thus presents the highest level of quality services.
6. As it is defended by many authors (Kotler et al., 2014; Brezovec, 2009) even beliefs that come from actual *knowledge* (e.g. experiences) or *trust* (in a brand or in a person stating something) may lead to a different purchase act, or even have a negative influence on business (e.g. the conviction that »a country is not safe«).

1.4 Bled

Bled as a tourist destination

Some authors claim that the Alps and the seaside regions of the Mediterranean Sea played the most important role in the development of European tourism (Alič & Cvikl, 2011). In 1818 Switzerland emerged as the first destination where 14-day horse-carriage tours were organised and thus Geneva, Lausanne, Vevey, Montreux and Chamonix were the first summer destinations to be placed on the tourist map. The geographical characteristics of Slovenia make it easy to compare the country with Switzerland. Therefore, the next logical step could be a parallel comparison between Swiss and Slovene development of lake-side and Alpine towns. The best example would be Bled where the Swiss Arnold Rikli started to develop tourism in 1854. The Alps are regarded as the second most popular tourist destination in the world (Vrtačnik, 2005).

Right after Ljubljana and Piran, Bled with the Julian Alps is the third most visited place in Slovenia. As shown in Table 1 in 2014 Bled had 6,077 beds and in 2015 684,015 overnight stays of guests that came from 139 countries of the world. Interestingly Sirše (2005) asserts that »Bled presents 0.1 % of the total receptive tourism in the region of the European Alps and Northern Adriatic that in total have 3.1 million of beds and 745 million of potential overnight stays per year.»

The tourism competitiveness report (WEF, 2015) analyses 141 countries and after the leading country Switzer-

Table 1: Number of overnight stays and number of beds in Bled (SURS, 2016)

Year	2008	2009	2010	2011	2012	2013	2014	2015
Beds	5.149	4.825	5.630	5.798	5.856	5.805	6.077	6.284
Overnight stays	540.480	509.230	549.590	571.756	598.396	628.491	643.975	684.015

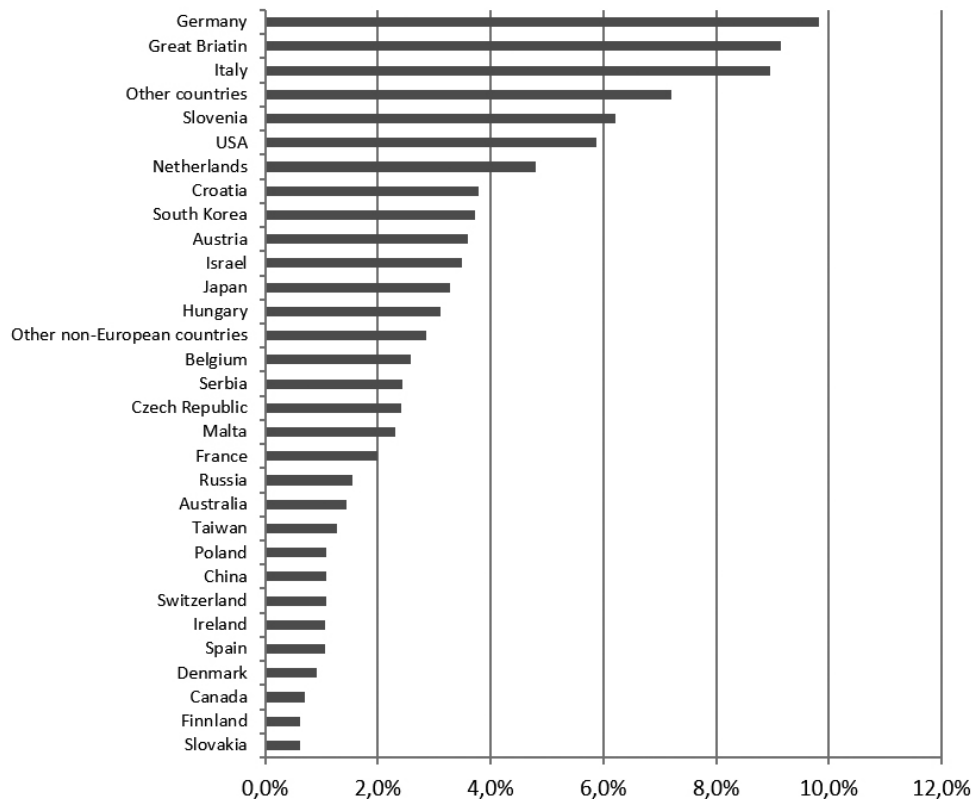


Figure 1: Key markets for Bled according to the annual number of overnight stays in 2015 (SURS, 2016)

land Slovenia, with a similar Alpine resort of Bled, reaches only the 39th place. This proves that Slovenia with Bled as the flagship still has a potential to grow. It is interesting to note that Bled as many other Alpine destinations experiences the shortening of overnight stay to less than 3 days, which means that further efforts need to be invested into attracting more clients with different interests and backgrounds to achieve the same results. Bled offers a mixture of products for different generations, segments (leisure, MICE, groups, FIT), seasons, events and interests. However, the main challenge remains the same, namely how to increase occupancy in low-season periods. Figure 2 shows main season peaks and the challenging less profitable low-season periods.

Figure 1 shows Bled's key markets where none of them breaks the 10% share of the total. The three leading countries are Germany, Great Britain and Italy (SURS, 2016).

Different marketing approaches have been applied to promote Bled from the beginnings, but none so far have addressed the destination image. The 2009-2020 Bled marketing strategy introduced a slogan that puts the image in the forefront: *Bled, imago paradisi* or the image of paradise.

Image of Bled

The image of Bled was used as the cornerstone of the national image of former Yugoslavia and Slovenia. In the beginning of the 20th century, Bled boasted as the resort of the pre-war elite and after the Second World War, it co-created the image of Yugoslavia that based its monetary influx and reputation on tourism. The English High 50 (2016) mentions how the former president Tito used devaluated currency *dinar* to attract English tourists to Pula, Split, Dubrovnik and Bled. The image of lake Bled

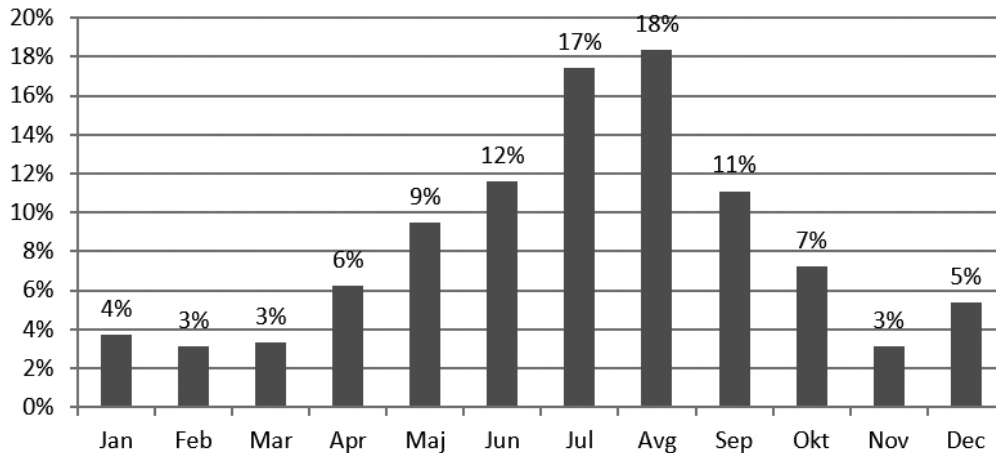


Figure 2: Monthly overnight stay shares in 2015 (SURs, 2016)

with the church was always used at the side of the image of the old city of Dubrovnik. Towards the end of the 1980s Yugoslavia with Bled was the second favourite destination for English tourists.

Nowadays Bled is positioned relatively high on various informal ratings by The National Geographic, The Forbes, The Lonely Planet, The Guardian and many other media (the criteria being: the most beautiful lakes, the most hidden, interesting, romantic, natural places or similar). Tourist guides recommend Bled as the must-see sight that needs to include the pletna boat ride to the island, the climb of 99 steps towards the island church with the wishing bell, the visit of the castle of Bled and the walk around the lake that must be topped up with a traditional cream cake dessert called *kremšnita*. Further dimension of the image of Bled that are at the same time also tourism products are next to that: the traditional horse carriage ride with the coachmen called *fijaker*; the gorge of Vintgar, climbs for eye-catching views from the hills of Ojstrica and Kuhovnica, the adventure park Straža. Product portfolio has been increased with the Pokljuka plateau, the Triglav National Park, the cave under Babji zob, the waterfall Iglica. Certain segments or markets (such as German-speaking tourists) would link the visit of Bled with a stop-over at the folk music homestead of Avsenik, the pilgrimage church of Brezje. The English, on the contrary, may relate Bled to weddings at the castle. The Americans would connect Bled with an obligatory visit of the former president Tito's summer mansion Vila Bled. For the Slovenes it is a must to walk around the lake, skate on its frozen surface and relish a cream cake with a view of the lake.

Marketing promotion of Bled

There are two sectors in charge of the promotion of Bled, development of tourism and its products:

- the public sector: municipality of Bled, institute for tourism development Turizem Bled, facility and infrastructure maintenance Infrastruktura Bled, Bled Culture Institute, Higher Vocational College for Hospitality and Tourism Bled, tourist and local associations, locals, clubs, Slovene Tourist Organization, Directorate for Tourism at the Ministry of the Economy;
- the private sector: hotels, boarding houses, tourist agencies, restaurants and catering services, medium- and small-sized companies, the Business School of IEDC.

Compliant with the strategy Bled 2009-2020, Turizem Bled as the leading promoter focuses not only on reconciled coordination of public and private partners, but also on the following key values:

- **nature:** the unique island with the church, the lake and surrounding mountains, the Triglav National Park,
- **tradition:** hiking, state protocol services and business tourism, international sports events,
- **people:** locals and tourist workers.

Due to the fact that target groups originate in various parts of the world and are different in the scope of interest numerous promotional channels are used and adjusted according to preferences and characteristics of visitors.

2 Methods

2.1 Research questions

Our research aimed to answer the following research questions:

1. How are the dimensions of Bled's image rated according to:
 - perceived uniqueness of complete image,
 - perceived uniqueness of attractions and experiences,
 - perceived quality of the environment (cleanness),
 - perceived feeling of safety.

2. How are the dimensions of the marketing mix rated according to:
 - perceived quality of products (accommodation, culinary offer, transfers, etc.),
 - perceived price of services,
 - perceived way by which Bled is sold,
 - perception of promotional channels,
 - perception of locals (politeness, friendliness, multicultural and religious openness, etc.) and
 - an existing positive experience of visiting Slovenia.

3. We were also interested to analyse if there is a connection between:
 - the »rated image dimensions of Bled« and the »scope of sales i.e. number of overnights«,
 - the »rated marketing mix dimensions« and the »scope of sales i.e. number of overnights«.

2.2 Instrument

The variables of the »image« group and the »marketing mix« group were measured with an online survey. The questionnaire items are authors' work and were not adopted from previous studies. Perceived uniqueness of the image was tested with 3 statements (*I know a few similar places. Natural sights are really worth visiting. One can have plenty of new and unique experiences.*). The respondents could state their opinion using the Likert scale: from saying that they strongly disagree to saying that they strongly agree, or they could express that no estimation could be made. Perceived uniqueness of attractions and experiences was examined with a question asking which of the 15 entities (*the lake, the island with the church, the wishing bell in the island church, etc.*) are the most unique. The respondents could evaluate each entity on the Likert scale: from not unique at all to completely unique, or they could express that no estimation could be made. Perceived quality of the environment was measured with four statements and the Likert scale expressing strong disagreement or agreement (*Bled is clean and neat. Bled is bound to sustainable and eco-friendly development. There is too much*

traffic. It is too noisy. Much more should be done to protect nature). Perceived feeling of safety was examined with two statements (*during my evening walk I feel safe; as a tourist you need to be quite careful*). Perceived quality of products was evaluated with eight statements (*quality is comparable to similar places; the quality of services decreases in the main season; hotel accommodations rank as Slovenia's best. etc.*). Perceived price of services was measured with two statements (*Visiting Bled is worth every euro. Bled is cheaper than lake-side resorts in Austria and Italy*). Perception of residents was examined with 4 statements (*Each tourist worker at Bled should speak 3 foreign languages. Locals are willing to help. Life is multicultural here. The locals are not keen on other religions*). A positive experience of visiting Slovenia was tested with three statements (*I am impressed and I will surely recommend Slovenia. The Slovenes are not aware of the country's treasures. Cultural heritage and tradition are not sufficiently appreciated*).

Closed-type questions were used with an increasing five-level Likert type scale in order to rate the level of agreement or disagreement with marks from 1 to 5 (1 showing full disagreement and 5 showing full agreement), the option 6 was given as a not-possible-to-estimate option. During our statistical analyses, negative statements were recoded.

Perceived way by which Bled is sold was examined with 8 assertions; several answers were possible (*I have already known Bled. It was part of the travel package. I have read about Bled in articles and printed media, etc.*). Perception of promotional channels was investigated with a question asking which promotional channels provided the respondents with further information about Bled; several answers were possible (*websites such as Tripadvisor, Travelocity and similar; online travel agents like Booking.com, Expedia, social media, websites of accommodation providers, Bled's local tourist organization website, Slovene tourist organization's website, tourist fair, press or fam trip, promotional leaflet, promotional TV film, radio, other*).

We measured the variable »scope of sales« by asking each respondent how many overnights at Bled they sell per year on average.

The online questionnaire was developed on the website www.lka.si and the survey took place from 14 March until 2 April 2016. Time needed to fill in the survey with 26 questions divided in 15 subsequent sections was estimated to 6 minutes. The survey was written in the English language and the link to the survey was sent by e-mail to 400 general addresses or to direct e-mail addresses of decision makers in sales or similar departments.

2.3 Sampling

The research was done among representatives of the tourism. Experience and many researchers have shown that

the image evaluation of a tourism representative bears an equal weight to the one of the potential destination visitor (McLellan & Foushee, 1983; Gartner, 1993; Gartner & Bachri, 1994; Baloglu & Mangalolu, 2001). Bitner & Booms (1982) similarly assert that tourists take final decisions which destination to visit for the first time upon the recommendations of a tourist agent. Invitations to cooperate in the research were sent to key tour operators and agents coming from the key markets of Bled, as well as to Slovene, Croatian, Czech and other neighbouring incoming agencies that bring guests from the countries that rank as the most important ones for Bled. 400 incoming agencies, tour operators, associations and travel agents that sell Bled and work with one of the authors at the major hotel chain at Bled were asked to participate. We received 235 fulfilled questionnaires. Out of them 164 respondents finished the survey and 71 respondents filled in the survey only partly. In the group of 164 respondents with the survey finished there are some who did not answer all the questions in full.

Respondents mainly come from the leisure segment, which is compliant with the analysis of the World Travel and Tourism Council (2016) which shows that Slovenia has 86.7% of leisure tourism and 13.3% of corporate and congress tourism. Respondents came from 30 world countries and this shows a wide geographic spread (and coverage) of the sample according to the nationality of the respondents. The term of nationality is used here with the reference to the country of origin of the business partner as well as of the guest making an overnight at Bled (statistics record guest nationalities and overnights). Because the national tourism statistics for Bled shows that the number of countries where visitors originate from increases and diversifies in time, we could estimate that good response from different countries present a satisfactory overview of currently active business partners. Figure 3 shows that the majority of respondents are decision makers who already have Bled in their sales portfolio or they might yet opt for it in the future. Correspondingly, the interpretation pre-

sented herein bears a solid weight, especially when taking into consideration that similar destination image surveys are mostly addressed to random individual guests or business partners.

3 Results

Research results are presented in two subsections covering the image dimensions as well as the marketing mix.

3.1 Image dimensions

Image uniqueness

The comparison of the arithmetic mean (Table 2) of answers shows that Bled is somewhat similar to the Austrian lake Zell am See and the German lake Bodensee, but a bit less similar to the Italian Garda Lake.

Uniqueness of attractions and experiences

As demonstrated in Table 3 the most unique attraction of Bled is the island with the church and the pletna boat. High ranking of the pletna boat according to the mean value came as a big surprise, whereas the result of the island was expected, since the island with the church is shown on practically every promotional material of Bled. Respondents find swans and the golf course the least unique. Moreover, we could interpret the answers about swans and the golf course as »of no distinctive value«. Consequently this opens the debate whether the golf course is really »nothing special« or maybe this exemplifies an inappropriate way of promotion.

Quality and cleanness of the environment

The respondents rated Bled as neat and clean with great strivings towards sustainable and eco-friendly development (Table 4). On the other hand, they find heavy traffic and noise disturbing.



Figure 3: Positions and responsibilities of respondents

Table 2: Image uniqueness

Think of other regions that you have visited or heard of. Please compare Bled with other regions.	N	Mean	Std. Dev.
Zell am See (Austria)	106	3,19	1,096
Lago di Garda (Italy)	130	2,99	1,124
Lake Constance/ Bodensee (Germany, Austria, Switzerland)	106	3,15	1,040

Table 3: Uniqueness of attractions and experiences

Which characteristics of Bled do you find most unique?	N	Mean	Std. Dev.
The island with the church	160	4,29	,893
Boat pletna	141	4,16	,897
Bled castle	158	3,97	1,037
Wishing bell in the island church	149	3,97	1,111
99 steps on the island	139	3,96	1,080
Cream cake	143	3,62	1,244
Hills around the lake with viewpoints	156	3,62	1,182
The lake	159	3,57	1,280
Healing lake water and Alpine climate	150	3,44	1,102
Coachmen fijaker	119	3,20	1,161
Walking path around the lake	157	3,04	1,293
Villas and renown hotels at the lake shore	156	3,01	1,283
Summer sledding and adventure park	133	2,92	1,178
Golf course Bled	126	2,69	1,203
Swans	152	2,48	1,207

Table 4: Quality and cleanness of the environment

How would you estimate the quality of Bled's environment?	N	Mean	Std. Dev.
Bled is clean and neat.	141	4,11	,931
Bled is bound to sustainable and eco-friendly development.	130	3,97	,940
There is too much traffic; it is too noisy.	132	2,86	1,320

Table 5: Perception of safety

Please estimate safety at Bled:	N	Mean	Std. Dev.
During my evening walk, I feel safe.	134	4,64	,698
Please estimate safety at Bled: As a tourist you need to be quite careful.	134	1,99	1,176

Perception of safety

Arithmetic mean and standard deviation values in Table 5 show that the majority finds Bled safe. The modifier safe or »safety« scored highest among all the statements of the survey. This is rather unusual since the concept of safety at Bled, when compared with other promoted specifics, is weekly communicated. On the other hand, we may relate this to the results of the World Economic Forum study (2015) which ranked countries according to safety. Out of 144 countries, Slovenia was positioned 14th. Our results thus could open the debate whether the promotion could be based on the concept of safety as well.

3.2 Marketing mix dimensions

Product quality

The comparison of arithmetic means in Table 6 shows that Bled is really worth visiting for the natural environment and to test diverse culinary offer as well as various activities. Bled's infrastructure is poorly rated. Next to that, it is surprising to find the quality of services and the quality of hotels on such a low level.

The respondents were asked to evaluate the product quality as a unit and the arithmetic mean value was only 3.26 (standard deviation 0.607). If we compare the results with other examined attributes such as the image uniqueness, uniqueness of attractions and experiences, then it needs to be stressed that quality is valued poorly and shows an unprosperous trait for the destination of Bled.

Table 6: Quality of the product

How much do you agree with the statements relating to quality, competencies and diversity?	N	Mean	Std. Dev.
Natural sights are really worth visiting.	148	4,56	,827
Tourists appreciate culinary diversity.	146	3,93	,987
There is not much night life.	111	3,81	1,124
Quality is comparable to similar places.	131	3,54	1,010
There are plenty of activities and events in most of the year.	132	3,48	,945
Each tourist worker at Bled should speak 3 foreign languages.	140	3,39	1,198
Hotel accommodation ranks as Slovenia's best.	131	3,29	1,071
The quality of services decreases in the main season.	106	3,15	1,040
Cultural heritage and tradition are not sufficiently appreciated.	127	3,00	1,155
Bled has poor infrastructure.	127	2,92	1,212

Table 7: Perceived price of services

Please compare Bled with similar tourist destinations price-wise.	N	Mean	Std. Dev.
Visiting Bled is worth every euro.	139	3,85	1,056
Bled is cheaper than lake-side resorts in Austria and Italy.	124	3,65	1,142
I would be willing to pay more for richer service.	135	3,24	1,205

Perceived price of services

The values of arithmetic means in Table 7 show that visitors think they get a fair value for the cost they pay, and at the same time they show a trend that we may be approaching the bottom line of how much a visitor can be charged for a richer scope of offer.

Perception of promotional channels and the way Bled as a destination is sold

In the interpretation of Table 8 we can expose tourist fairs (40.8%) to be the most important promotional channel, the second and third place show that the second phase of gathering information takes place on the websites of the Slovene tourist organization (27.5%) and the local tourist organization of Bled (27.1), so it shows their great importance as well.

Perception of residents

When we compare arithmetic means of statements for perception of residents in Table 9, we can see that they are considered to be friendly and willing to help. The tourist workers are estimated to perform their work in a professional way. On the other hand, the results show a rather reserved attitude towards other religions.

Positive experience of Slovenia

Respondents estimated the existing experience of Slovenia in a positive way (arithmetic mean was 3.76 (standard deviation 0.843).

Scope of Sales

Each respondent was asked to provide us with the information of average annual overnight numbers. They could choose among four options: up to 300 overnights, from 300 - 1.000 overnights, from 1.000 - 2.500 overnights or more than 2.500 overnights.

3.3 Analysis

Variable dependence

We tried to find dependencies among variables:

- the »evaluation of image dimensions on the case of Bled« versus the »scope of sales« and
- the »evaluation of the marketing mix dimensions« versus the »scope of sales«.

The aim was to first use a factor analysis for the gathered data, then to perform a regression analysis on new factors, and as the third step to make contingency tables for questions without the 5-level scale to analyse and record the relationship between two or more categorical variables.

All results showed that there is no dependence among the independent variables ("image" and "marketing mix") and the dependent variable (number of sold overnights).

Statistical analysis of dependence among variables, however, displayed the following:

Table 8: Perceived promotional channels and the ways by which Bled is sold

Which promotional channels provided you with further information about Bled? (Several answers are possible.)	%
Websites such as Tripadvisor, Travelocity, etc.	16,5
Online travel agents like Booking.com, Expedia, etc.	8,7
Social media	17,0
Websites of accommodation providers	21,6
Bled's local tourist organization website	27,1
Slovene tourist organization's website	27,5
Tourist fair	40,8
Press or fam trip	19,1
Promotional leaflet	8,8
Promotional TV film	11,2
Radio	2,6

Table 9: Perception of residents

How friendly are the tourist workers and locals of Bled? Do locals accept other cultures, habits, nationalities and religions?	N	Mean	Std. Dev.
Locals are willing to help.	130	3,97	,889
Tourist workers perform their work with great skills.	138	3,91	,879
People speak foreign languages with great ease.	125	3,54	,947
Life is multicultural here.	117	3,21	1,178
The locals are not keen on other religions.	91	3,03	1,206

1. As mentioned not all respondents answered all the questions. The number of valid answers for the analysis is shown in the survey results. This may be due to the fact that the survey was composed of a relatively high number of questions or statements. It needs to be mentioned that the sample could not be bigger since almost the entire population (400 partners) was asked to participate and the response remained within the usual frame of such surveys.

2. Cronbach's coefficient alpha was calculated for sets of questions and statements. The test of reliability or internal consistency measures how reliable and valid the measurement of an individual scale is. Most Cronbach's alpha coefficients are above 0.6 (segments asking for a comparable place, unique characteristics, the most convincing experience, quality of the environment, quality of services, personnel competencies and friendliness, price comparison and a general impression of Bled). Due to the fact that we have five categories which might be difficult to measure (image, perception, personal experience, actual experience with the service and personal opinion) we accept a lower level of reliability satisfaction. Similar practice of accepting instruments that have moderate reliability was used also for tests of personalities

with Cronbach's alpha at 0.6 (Loewenthal, 2001). Therefore, the core of the interpretation relies on the analysis of arithmetic statistical means and standard deviations.

3. The survey addressed key tour operators and agents that originate from the key markets of Bled tourist destination. Respondents are from 30 (for Bled) most important countries (out of 139 countries the first 30 countries present 90% of all overnights). Based on that we estimate that the chosen target group was appropriately chosen. The problem lies in the fact that the dependent variable (scope of sales measured in overnights) is affected by the potential of each separate market (e.g. guest share from Germany or Great Britain reaches nearly 10%, whereas Slovakia holds only a 1% share), which may lead to the fact that the reason for difference is the power of separate markets. The survey was given to tour operators and agents from all most important markets, even the ones that contribute a smaller share of overnights to Bled.

4. With the multivariate data analysis for more than one variable, we proved that variables included in the model are linearly connected.

		Levene's Test for Equality of Variances		t-test for Equality of Means						
		F	Sig.	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	95% Confidence Interval of the Difference	
									Lower	Upper
Image uniqueness	Equal variances assumed	,109	,742	,188	107	,851	,03320	,17683	-,31734	,38375
	Equal variances not assumed			,194	72,224	,847	,03320	,17151	-,30867	,37508
Uniqueness of attractions	Equal variances assumed	1,268	,263	-,294	97	,769	-,04552	,15487	-,35290	,26186
	Equal variances not assumed			-,315	81,035	,754	-,04552	,14449	-,33302	,24198
Environment quality	Equal variances assumed	1,637	,203	-,046	118	,964	-,00694	,15219	-,30832	,29443
	Equal variances not assumed			-,050	81,620	,960	-,00694	,13956	-,28460	,27071
Safety	Equal variances assumed	,907	,343	,337	130	,737	,04843	,14374	-,23594	,33281
	Equal variances not assumed			,313	59,117	,756	,04843	,15490	-,26151	,35837
Product quality	Equal variances assumed	1,539	,218	-,512	78	,610	-,06628	,12945	-,32398	,19143
	Equal variances not assumed			-,555	68,857	,581	-,06628	,11945	-,30459	,17204
Price	Equal variances assumed	,059	,808	,503	118	,616	,09561	,19025	-,28113	,47235
	Equal variances not assumed			,511	59,766	,611	,09561	,18708	-,27864	,46986
Residents	Equal variances assumed	5,113	,026	,220	83	,826	,03371	,15318	-,27096	,33838
	Equal variances not assumed			,251	78,507	,803	,03371	,13445	-,23393	,30136
Positive experience of Slovenia	Equal variances assumed	1,937	,167	,460	112	,646	,07051	,15323	-,23309	,37412
	Equal variances not assumed			,486	78,404	,628	,07051	,14495	-,21804	,35907

Table 10: T-test of equality for arithmetic means

Despite the issues presented above the variables were additionally statistically tested. The dependent variable (the scope of sales measured in overnights) was according to the size (sold annual overnights) attributed with two new values, namely a »big-sized« and »small-sized« operator or agent. The relation among the dependent and all independent variables was tested with a t-test of equality for arithmetic means.

The differences among arithmetic means of responses are not statistically important (Table 10). Thus, the further statistical analysis did not bring any better statistically valid results that would show an important influence of marketing and promotion on sales.

4 Conclusions

The initial goal of our research was to find out how business partners of the destination Bled estimate the dimensions of the image and the dimensions of the marketing mix of Bled. According to the available information, this can be regarded as the first research of such value for the destination of Bled. The first scope of set goals was met fully since we could get the estimation of the service quality, environmental factors and competences of service providers.

The category »safety« ranked the highest in all responses; it has the highest arithmetic means and the lowest standard deviation. These findings are somewhat surprising since safety is positioned first before all other tested entities. It even leads before the natural features of Bled. Our expected assumption that the most unique attraction of Bled is the island with the church was confirmed. Since the pletna boat ranked so high it might be useful to base more promotional activities on the pletna boats as the second best attraction of Bled. Many respondents find high similarity with nearby tourist destinations in Austria and Italy. We can claim that there might be some actual resemblance (all destinations have Alpine lakes), however, the results do not show great similarity. This very fact and the uniqueness of the island with the church show that Bled is very special and unique. It needs to be continually promoted in this way. Having in mind that the pletna boats proved to be so appreciated and unique as well, they should be added to the promotional portfolio of Bled's characteristics and products in a more intense way. On the other hand, the frequently promoted historical specifics of Bled, the fijaker horse-carriage rides, do not get a good ranking and it might be wise to reconsider if they should be stressed as the forefront promoting element. Similar findings are also linked to the cream cake kremšnita.

Traffic was estimated with the lowest values. Unfortunately, the analysis of the results could not evaluate the

damage of the unregulated traffic in Bled. We were also surprised to see tolerance of locals towards other cultures and religions on such a low level. A poor level of service quality in the main tourist season is quite alarming as well. Similarly, it is a strikingly surprising fact that our research could not prove that the golf course of Bled, promoted as one of the most beautiful golf courses in Europe, is really unique at all. Maybe this only opens the debate that the golf tourism segment is more specific, but it can be stressed that there is no general awareness of unique golfing experience at Bled. Further on we can state that the price politics and market positioning of Bled need to be fully revised.

Based on the findings of the research we cannot claim with great certainty how big the influence of the image and marketing mix on the scope of sold overnights is. Respondents estimate the image attributes of safety and natural beauties as the best values. Low standard deviation for these two specifics (at the 5-scale estimation both have the value below 0.700) could not direct us towards finding any correlation between the mentioned variables and the scope of sales. On the other hand, we have no firm reverse proof that these two attributes in fact do not influence sales. It is our opinion that these are crucial elements for successful sales. Unfortunately, our empirical research results (e.g. correlation analysis) cannot directly support our estimation. We need to address the high importance of promoting Bled at specialized tourist fairs as well. Quality and informative tourist websites of a destination or of a country are similarly important promotional channels. Digital thinking is no longer a matter of innovation. It is what keeps destinations alive and competitive in a modern world where even the world's most prominent tourism destinations must be able to understand their potential tourists' online demand, the international trends, the strategy of their competitors and the competitiveness of their products. Google (2014) states that 65% of tourists do an online research before deciding for the next holiday destination. The importance of advice of friends and family is thus surpassed. Predicting behaviour from potential tourists from the analysis of online big data (searches, social media, meta-searches) may constitute the next big step to find not only the right promotion channels but also the right targets and messages to use.

While differentiating factors from other "Alpine" destinations have been found both in base and field research, it is important to be aware that the promotion of Bled can be considered underachieved. It is essential to note that the local political and tourism industry stakeholders need to work together towards finding the destination's central idea (the vision) and create the necessary policies, actions and activities necessary to promote a differentiated image of Bled abroad in key target markets.

Frequently it can be heard that each euro invested in the promotion returns in a fourfold measure, however, our final findings cannot confirm or deny that.

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