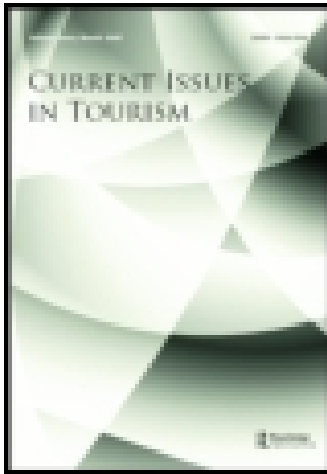


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### Orientation to sustainability and strategic positioning of destinations: an analysis of international tourism websites

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## RESEARCH LETTER

### **Orientation to sustainability and strategic positioning of destinations: an analysis of international tourism websites**

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*(Received 19 April 2014; accepted 9 September 2014)*

The communication that Destination Management Organizations (DMOs) address to destination stakeholders plays a central role in attracting attention and resources for sustainable destination development and disclosing the efforts made to be a sustainable territory. There has been extensive analysis on the role of official tourism websites that addresses both DMO's internal and external stakeholders. However, less exploration is available on the relationship between the contents disclosed through tourism websites and the strategic positioning of the destination. This study empirically examines that link with a focus on 'green/sustainable/responsible' travel. Results show a positive association between the orientation to sustainability in online communication and both sustainable regulation of the tourism sector and tourism development. In contrast, there is no significant association with destination size, tourism maturity and pricing policies.

**Keywords:** strategic positioning; destination management; communication; tourism websites; competitiveness

#### **1. Sustainability, communication and strategic positioning of tourism destinations**

Sustainability is an increasingly important governing principle in the management and competitiveness of tourism destinations over the long term (Middleton & Hawkins, 1998; Mihalic, 2000; Ritchie & Crouch, 2005).

The literature of strategic management points out that the creation of sustainable competitive advantages occurs both through strategic investment and development of offers, and through communication aimed at building an attractive image (Crouch, 2011; Dwyer & Kim, 2003; Mazanec, Wöber, & Zins, 2007; Rindova & Fombrun, 1999; Ritchie & Crouch, 2000, 2003).

In the tourism field, studies on the competitiveness of destinations have also identified image as a key asset in building sustainable competitive advantages (Crouch, 2011; Dwyer & Kim, 2003; Mazanec et al., 2007; Ritchie & Crouch, 2000, 2003). In addition, several authors have analysed the role of communication in the process of image building and destination development (d'Angella & De Carlo, 2012; Govers & Go, 2009; Gretzel, Law, & Fuchs, 2010; Stepchenkova & Morrison, 2006).

Within this framework, online communication is a particularly suitable tool that has been examined in numerous studies in the field of destination management (Benckerdoff & Black, 2000; Choi & Morrison, 2005; Frew, 1999; Morrison, Taylor, & Morrison, 1999; Park & Gretzel, 2007; Qi, Law, & Buhails, 2008; So & Morrison, 2004). Some

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authors show that effective online communication is a source of competitive advantage (Baggio, 2003; Buhalis & Law, 2008). Many authors agree that the more a tourism portal allows interaction with its users, the more it contributes to a destination's image building (Cano & Prentice, 1998; Gretzel, Yuan, & Fesenmaier, 2000).

In particular, there has been extensive analysis investigating the role of official tourism websites in building the image of a destination (Choi, Lehto, & Morrison, 2007; Doolin, Burgess, & Cooper, 2002; Hornig & Tsai, 2009) to assess their effectiveness in terms of interaction with the users, their satisfaction and behaviour (Qi et al., 2008; So & Morrison, 2004; Wober, 2003).

Since fewer studies explored the relationship between Destination Management Organization (DMO)'s official online communication and the strategic positioning of the destination (d'Angella & De Carlo, 2012), which means its peculiar way of carrying out activities to compete and serve clients and stakeholders (Mintzberg, 1987; Porter, 2001), this study is the first explorative attempt into this direction.

## 2. Methodology

### 2.1. Sample, variables and data sources

This study is based on a sample of 77 official tourist websites – that address both DMO's internal and external stakeholders, primarily tourists, but even meeting planners, trade and other tourism companies – of the most important urban destinations in terms of international arrivals. The sample includes 44 non-European and 33 European destinations (Table 1).

Destinations are selected by using the 2010 Euromonitor International's cities ranking, that ranks the top urban destinations in the world for international arrivals. From the first 100 destinations, we excluded cities without an official tourism site or without a full English language version.

To evaluate our sample, the cities are placed in the matrix for tourism development proposed by Weaver (2000, 2011). This model connects sustainable regulation ('regulation associated with the tourism sector') to tourism development ('level of tourism intensity'). The first variable is measured using the Eco ranking published by Mercer, chosen as an acceptable proxy of the existence of sustainable regulations. Eco ranking surveyed 221 cities, assigning a score based on secondary data about environmental sustainability (i.e. availability of water, potable water, trash removal, waste water treatment, air pollution and traffic congestion). The second variable ('level of tourism intensity') is measured as the ratio between international arrivals and the resident population. The international arrivals refer to 2009, the most recent data available.

As suggested by Weaver (2000), these two variables are transformed from continuous to discrete by calculating their median value. When positioning the 77 cities within the matrix (Figure 1), there emerged a heterogeneous distribution that covers all four quadrants, ensuring a good representation of four ideal types of tourist destinations.

The variables adopted for the analysis are six. The first one, *Green D-web score*, is a continuous variable that we specifically created for this empirical study to measure the orientation to sustainability in the online communications of the destinations. To calculate this value, we adopted a checklist of 35 binary indicators organized in seven areas of analysis: general, infrastructure, transportation, experience, food, shopping and hospitality (Table 2).

This checklist is based on the Destination Website Evaluation (D-web), a model used to benchmark destinations tourism websites (Feng, Morrison, & Ismail, 2004; Morrison & So,

Table 1. Sample composition.

Area	City	URL
Non-European	Abu Dhabi	<a href="http://visitabudhabi.ae/en/default.aspx">http://visitabudhabi.ae/en/default.aspx</a>
	Agra	<a href="http://www.up-tourism.com/destination/agra/agra.htm">http://www.up-tourism.com/destination/agra/agra.htm</a>
	Auckland	<a href="http://www.aucklandnz.com/">http://www.aucklandnz.com/</a>
	Bangkok	<a href="http://www.bangkoktourist.com">www.bangkoktourist.com</a>
	Beijing	<a href="http://www.ebeijing.gov.cn/Travel/">http://www.ebeijing.gov.cn/Travel/</a>
	Buenos Aires	<a href="http://www.visitingbuenosaires.com/">http://www.visitingbuenosaires.com/</a>
	Cape Town	<a href="http://www.capetown.travel/">http://www.capetown.travel/</a>
	Chicago	<a href="http://www.choosetchicago.com/">http://www.choosetchicago.com/</a>
	Delhi	<a href="http://www.delhitourism.gov.in/delhitourism/index.jsp">http://www.delhitourism.gov.in/delhitourism/index.jsp</a>
	Dubai	<a href="http://www.definitelydubai.com/">http://www.definitelydubai.com/</a>
	Guangzhou	<a href="http://english.gz.gov.cn/publicfiles/business/htmlfiles/gzgovens3691/201103/778229.html">http://english.gz.gov.cn/publicfiles/business/htmlfiles/gzgovens3691/201103/778229.html</a>
	Hangzhou	<a href="http://en.gotohz.com/">http://en.gotohz.com/</a>
	Hong Kong	<a href="http://www.discoverhongkong.com">http://www.discoverhongkong.com</a>
	Honolulu	<a href="http://www.gohawaii.com/oahu">http://www.gohawaii.com/oahu</a>
	Jakarta	<a href="http://www.jakarta-tourism.go.id/">http://www.jakarta-tourism.go.id/</a>
	Johannesburg	<a href="http://www.joburgtourism.com/">http://www.joburgtourism.com/</a>
	Kuala Lumpur	<a href="http://www.visitkl.gov.my">www.visitkl.gov.my</a>
	Las Vegas	<a href="http://www.visitlasvegas.com">www.visitlasvegas.com</a>
	Lima	<a href="http://www.lima.travel">www.lima.travel</a>
	Los Angeles	<a href="http://discoverlosangeles.com">http://discoverlosangeles.com</a>
	Macau	<a href="http://www.macautourism.gov.mo/en/index.php">http://www.macautourism.gov.mo/en/index.php</a>
	Mexico City	<a href="http://www.mexicocity.com/">http://www.mexicocity.com/</a>
	Miami	<a href="http://www.miamiandbeaches.com">http://www.miamiandbeaches.com</a>
	Montreal	<a href="http://www.tourisme-montreal.org/">http://www.tourisme-montreal.org/</a>
	Mumbai	<a href="http://www.mumbai.org">www.mumbai.org</a>
	New York	<a href="http://www.nycgo.com">www.nycgo.com</a>
	Orlando	<a href="http://www.orlandoinfo.com">www.orlandoinfo.com</a>
	Phuket	<a href="http://www.phukettourist.com">www.phukettourist.com</a>
	Rio De Janeiro	<a href="http://www.rio.com/">http://www.rio.com/</a>
	Riyadh	<a href="http://arriyadh.com/Eng/Tourism/index.aspx">http://arriyadh.com/Eng/Tourism/index.aspx</a>
	San Francisco	<a href="http://www.onlyinsanfrancisco.com/">http://www.onlyinsanfrancisco.com/</a>
	Sao Paulo	<a href="http://www.visitesaopaulo.com/en/index.asp">http://www.visitesaopaulo.com/en/index.asp</a>
	Seattle	<a href="http://visitseattle.org/Home.aspx">http://visitseattle.org/Home.aspx</a>
Seoul	<a href="http://www.visitseoul.net/en/index.do">http://www.visitseoul.net/en/index.do</a>	
Shanghai	<a href="http://www.meet-in-shanghai.net/">http://www.meet-in-shanghai.net/</a>	
Singapore	<a href="http://www.yoursingapore.com">www.yoursingapore.com</a>	
Sydney	<a href="http://www.sydney.com">www.sydney.com</a>	
Taipei	<a href="http://www.taipeitavel.net">www.taipeitavel.net</a>	
Tel Aviv	<a href="http://www.visit-tel-aviv.com">www.visit-tel-aviv.com</a>	
Tokyo	<a href="http://www.tourism.metro.tokyo.jp">http://www.tourism.metro.tokyo.jp</a>	
Toronto	<a href="http://www.seetorontonow.com">www.seetorontonow.com</a>	
Vancouver	<a href="http://www.tourismvancouver.com">www.tourismvancouver.com</a>	
Washington DC	<a href="http://www.washington.org">www.washington.org</a>	
Wellington	<a href="http://www.wellingtonnz.com">www.wellingtonnz.com</a>	
Italian	Bologna	<a href="http://iat.comune.bologna.it/IAT/IAT.nsf">http://iat.comune.bologna.it/IAT/IAT.nsf</a>
	Florence	<a href="http://www.firenzeturismo.it">www.firenzeturismo.it</a>
	Genua	<a href="http://www.genova-turismo.it">www.genova-turismo.it</a>
	Milan	<a href="http://www.turismo.milano.it/">www.turismo.milano.it/</a>
	Naples	<a href="http://www.inaples.it">http://www.inaples.it</a>
	Rimini	<a href="http://www.riminiturismo.it">www.riminiturismo.it</a>
	Rome	<a href="http://en.turismoroma.it/">http://en.turismoroma.it/</a>
	Turin	<a href="http://www.turismotorino.org">www.turismotorino.org</a>
Venice	<a href="http://www.turismovenezia.it/">http://www.turismovenezia.it/</a>	
Verona	<a href="http://www.tourism.verona.it">http://www.tourism.verona.it</a>	

(Continued)

Table 1. Continued.

Area	City	URL
European	Amsterdam	<a href="http://www.amsterdam.info/">http://www.amsterdam.info/</a>
	Antalya	<a href="http://www.antalya.org">www.antalya.org</a>
	Athens	<a href="http://www.breathtakingathens.com">www.breathtakingathens.com</a>
	Barcelona	<a href="http://www.barcelonaturisme.com">www.barcelonaturisme.com</a>
	Berlin	<a href="http://www.visitberlin.en">www.visitberlin.en</a>
	Brussels	<a href="http://www.bruxelles-tourisme.be/">http://www.bruxelles-tourisme.be/</a>
	Budapest	<a href="http://www.budapestinfo.hu">www.budapestinfo.hu</a>
	Dublin	<a href="http://www.visitdublin.com">www.visitdublin.com</a>
	Istanbul	<a href="http://www.istanbul.com">www.istanbul.com</a>
	Kiev	<a href="http://www.visitkievukraine.com">http://www.visitkievukraine.com</a>
	Lisbon	<a href="http://www.visitlisboa.com">www.visitlisboa.com</a>
	London	<a href="http://www.visitlondon.com">www.visitlondon.com</a>
	Madrid	<a href="http://www.esmadrid.com">www.esmadrid.com</a>
	Moscow	<a href="http://www.moscow-city.ru/">http://www.moscow-city.ru/</a>
	Munich	<a href="http://www.munich-tourist.de">www.munich-tourist.de</a>
	Oslo	<a href="http://www.visitoslo.com">http://www.visitoslo.com</a>
	Paris	<a href="http://www.parisinfo.com">www.parisinfo.com</a>
	Prague	<a href="http://www.praguewelcome.cz/">http://www.praguewelcome.cz/</a>
Sofia	<a href="http://www.visitsofia.bg/index.php?lang=en">http://www.visitsofia.bg/index.php?lang=en</a>	
St. Petersburg	<a href="http://www.visit-petersburg.com/">www.visit-petersburg.com/</a>	
Stockholm	<a href="http://beta.stockholmtown.com/en/">http://beta.stockholmtown.com/en/</a>	
Vienna	<a href="http://www.wien.info/en">http://www.wien.info/en</a>	
Warsaw	<a href="http://www.e-warsaw.pl">www.e-warsaw.pl</a>	

2004). The original model is made up of four sections: *technical perspective*, *customer perspective*, *marketing perspective* and *destination information perspective*. The Green D-web includes only the third and fourth perspectives adapted to sustainability issues.

Moreover, we consider five variables to measure the strategic positioning of the destinations. Two variables are used to position the cities within the matrix of tourist destination development, while the remaining three are related to the destination's size, the stage of its life cycle and its pricing policies.

As described before, the *adoption of sustainable regulations and practices* is estimated by using the Eco city ranking index, which covers 62 of the 77 cities of the sample.

The *rate of tourism development* is measured as the ratio between international arrivals and the number of inhabitants. This value is available for 76 destinations.

The *size of the destination* is measured in terms of the number of its permanent residents.

The *tourism maturity of the destination* is measured in terms of international arrivals variation in the period 2006–2009. This value is available for 59 cities.

Finally, the *competitiveness of hotel prices* is measured according to the Hotel Price Index, an annual report that compares the average prices of a group of urban destinations that covered 60 out of the 77 cities in our sample.

## 2.2. Analyses and hypotheses

The empirical analysis is divided into two phases. First, we measured the orientation to sustainability in the communication disclosed by the DMO through its official tourism portal synthesized in the Green D-web Score. To reduce subjectivity, each website was assessed separately by three researchers.

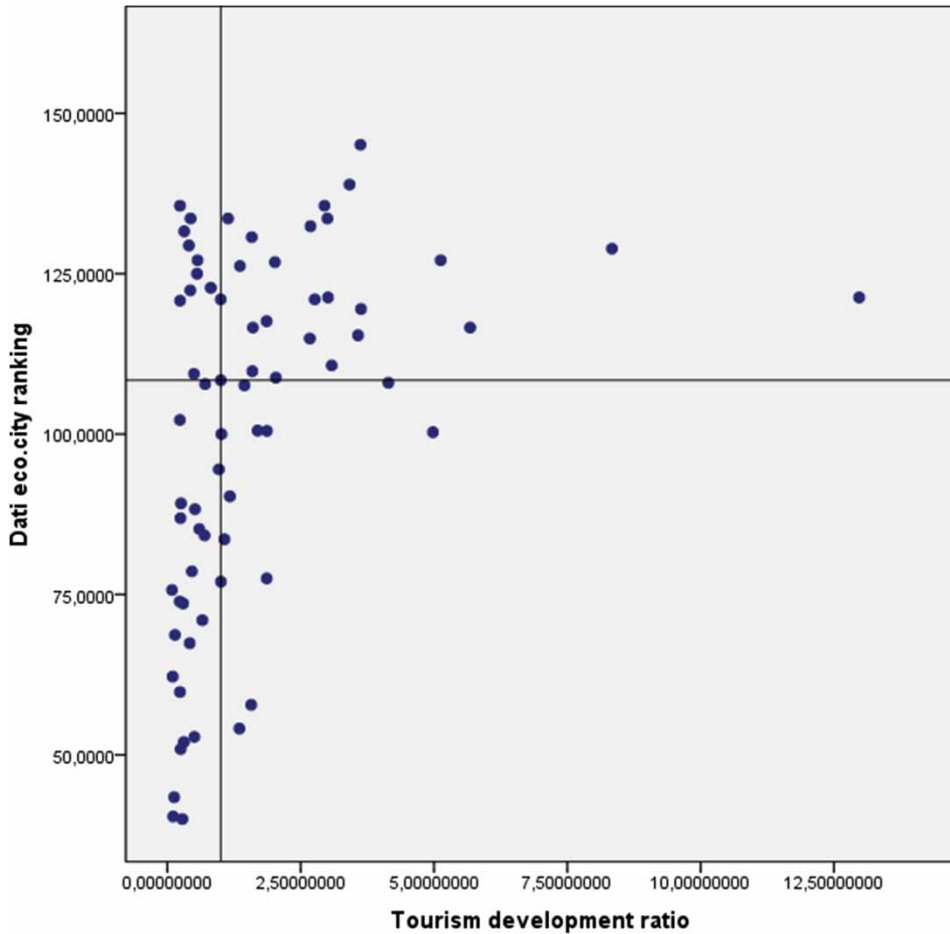


Figure 1. Positioning of cities in Weaver's matrix.

In the second phase, we tested five hypotheses, centred on the link between the orientation to sustainability in online communication (Green D-web Score) and strategic positioning of the destinations. In particular, we tested the existence of associations between the contents disclosed by official tourism portals and:

- Hp1 – the adoption of sustainable regulations and practices.
- Hp2 – the rate of tourism development of the destination.
- Hp3 – the size of the destination.
- Hp4 – the tourism maturity of the destination.
- Hp5 – the competitiveness of hotel prices.

To verify the five assumptions, we performed a series of *t*-test.

### 3. Results

Our analysis of the destinations' official websites revealed Green D-web scores between 1 and 30 points out of 35 points maximum. Eleven destinations – the top performers – show

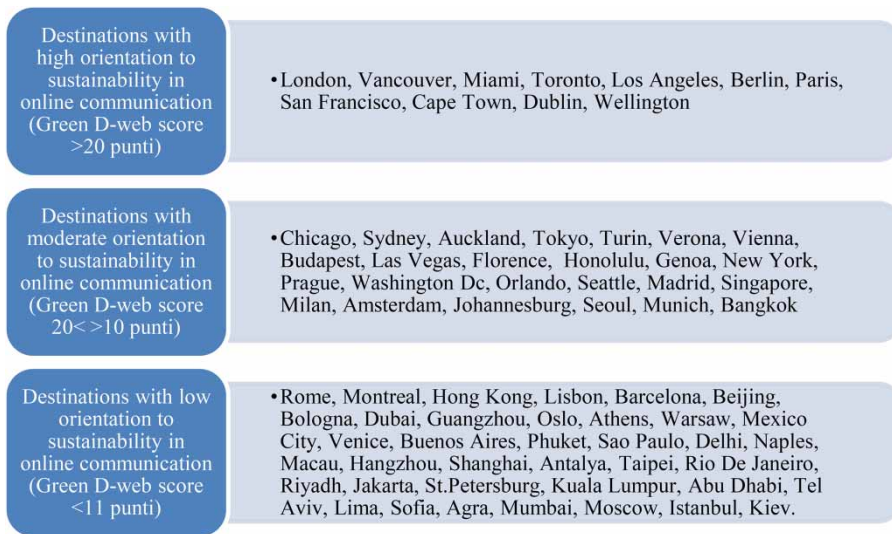


Figure 2. The orientation to sustainability of official tourism website communication.

values greater than 20 points and allocate considerable space within their websites to sustainability issues.

A second congruous group of destinations – 28 cities – show a moderate orientation to sustainability, with scores between 11 and 20 points. The remaining destinations give little space to sustainability in their official tourism portals (Figure 2).

The results of the *t*-test analyses (Table 3) show a significant association between the orientation to sustainability in communication and both the intensity of tourism development and the overall sustainability of the destination.

In contrast, there is no significant association between the orientation to sustainability in communication and the other three variables. Since orientation to sustainability in online communication is not related to the size of the destination, a large city can take advantage of this as much as a small town. Similarly, sustainability can be an asset for both mature and emerging destinations because it is not linked to positive or negative variations of tourism flows. Finally, the orientation to sustainability in communication is not linked to positioning based on price competitiveness.

Therefore, hypotheses 1 and 2 are verified, whereas assumptions 3, 4 and 5 are not.

To complete this explorative analysis, we assessed the average Green D-web Score for all the 4 archetypes of destinations. We found that those having truly implemented sustainable standards are also those that have made the greatest efforts in orienting their online communication towards sustainability.

Among these, cities with low levels of tourism development (DAT – deliberate alternative tourism) turned out to be the best performers with an average Green D-web score of 15.8. In contrast, cities with a high capacity for attracting tourist flows in relation to their size (SMT – sustainable mass tourism) showed slightly lower scores (14.9) and greater variability of results (from 4 to 30 points).

Correspondingly, the cities less oriented to the adoption of sustainable standards are also those whose website contents are less oriented to sustainability. Destinations with high tourism development (UMT – unsustainable mass tourism) as well as destinations with a large growth potential (CAT – circumstantial alternative tourism), had average

Table 2. Green D-WEB variables.

#	Variable	Areas of analysis
1	On the HOMEPAGE: is there information regarding green/sustainable/responsible travel?	General
2	Contents INSIDE the website: Is there a specific section regarding green/sustainable/responsible travel?	General
3	Does the website feature green travel as a definite SEGMENT?	General
4	Does the website suggest green travel TIPS?	General
5	Does the website refer to any CARBON OFFSET option?	Infrastructures
6	Does the website promote a green accreditation SCHEME?	General
7	Does the website promote environmentally friendly ATTRACTIONS?	Infrastructures
8	Does the website promote GREEN TRANSPORT?	Transports
9	Does the website refer to CLIMATE CHANGE?	General
10	Does the website refer to GREEN MEETINGS or EVENTS?	Experience
11	Does the website provide information about FARMING HOLIDAYS?	Experience
12	Does the website provide information about VOLUNTEER TRAVEL?	Experience
13	Does the website provide information about WALKING TOURS/HOLIDAYS?	Transports
14	Does the website provide information about CYCLING OR MOUNTAIN BIKE TOURS/HOLIDAYS?	Transports
15	Does the website provide information for BACKPACKERS?	Experience
16	Does the website provide information about WILDERNESS TOURS/HOLIDAYS?	Experience
17	Does the website provide information about TOURS USING LOCAL TRANSPORT?	Transports
18	Does the website provide information about BIRDWATCHING TOURS OR HOLIDAYS?	Experience
19	Does the website provide information about BOTANY TOURS or HOLIDAYS?	Experience
20	Does the website provide information about COOKING ACTIVITIES/HOLIDAYS?	Food
21	Does the website provide information about FOOD TRAVEL?	Food
22	Does the website provide information about WINE TASTING TOURS or HOLIDAYS?	Food
23	Does the website provide information about SPA and WELLBEING HOLIDAYS?	Experience
24	Does the website provide information about PHOTOGRAPHY TOURS or HOLIDAYS?	Experience
25	Does the website provide information about LOW CARBON TRAVEL?	Transports
26	Does the website provide information about VEGETARIAN or VEGAN HOLIDAYS?	Food
27	Does the website provide information about ORGANIC SHOPPING TOURS?	Shopping
28	Does the website provide information about ETHICAL or ECO-FRIENDLY SHOPS?	Shopping
29	Does the website provide information about ACCESSIBLE AREAS or FACILITIES?	Infrastructures
30	Does the website provide information about B&B and guest houses?	Hospitality
31	Does the website provide information about CAMPSITES and caravan parks?	Hospitality
32	Does the website provide information about ECOLOGES?	Hospitality

(Continued)



Table 2. Continued.

#	Variable	Areas of analysis
33	Does the website provide information about FARMSTAYS ACCOMMODATION?	Hospitality
34	Does the website provide information about ACCESSIBLE HOTELS?	Hospitality
35	Does the website provide information about lodgings with ECOLABELS or other certifications?	Hospitality

Table 3. Results of *t*-tests.

		<i>N</i>	Media Green D-web score	Sig.
Adoption of sustainable regulations and practices	Low	31	7.6129	0.000
	High	31	15.5161	
Rate of tourism development	Low	38	9.4474	0.013
	High	38	13.0789	
Size	Small city	39	12.1026	0.267
	Large city	38	10.4737	
Tourism maturity	In decline	29	11.1034	0.459
	Growing	30	12.3000	
Competitiveness of hotel prices	Low prices	33	11.7879	0.886
	High prices	27	12.0370	

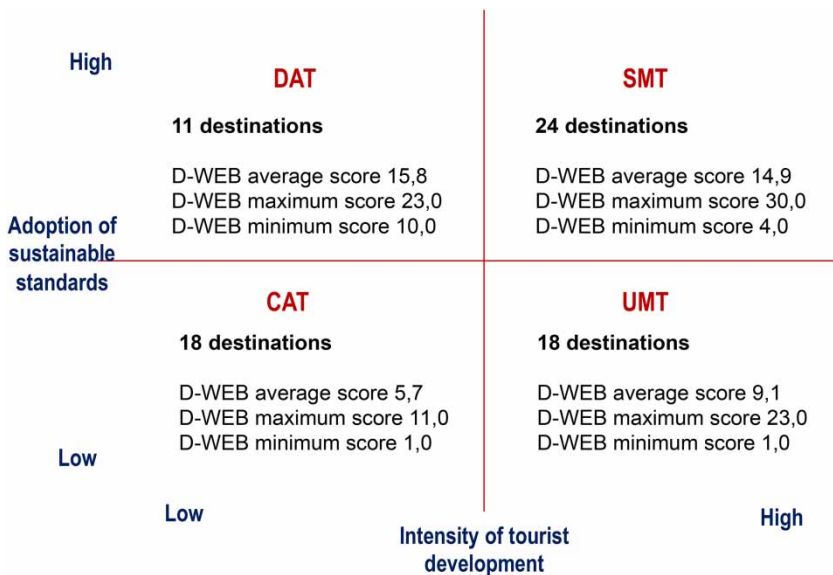


Figure 3. The orientation to sustainability of online communications of the four groups of destinations identified in the tourism development matrix.

Green D-web scores less than 10. However, destinations with high tourism development also include territories with moderate to high orientation to sustainability in their online communication (highest score 23 points), while destinations with a large growth potential have a low orientation to sustainability, excepting Seoul (Figure 3).

#### 4. Conclusions

Our analysis of the orientation to sustainability in the online communication of official tourism websites highlights the existence of destinations with very different profiles and a large potential for policy improvement still unexploited.

This study contributes to a deeper understanding of the processes of destinations' tourism development, pointing out the relevance of online communication for the competitiveness of tourist destinations.

An orientation to sustainability in communication can facilitate the repositioning of the cities in Weaver matrix determining horizontal shifts within the quadrants (CAT → UMT; DAT → SMT). This repositioning can be especially important for DAT destinations that could leverage the implementation of sustainable standards and practices that will promote the territory – within the limits of the carrying capacity – and develop tourism products that are designed according to the needs of environmentally sensitive tourists.

Conversely, low orientation to sustainability in communication implies a missed opportunity for sharing a territory's unique identity with its stakeholders.

In addition, this study highlights the importance of communication oriented to sustainability for tourism product differentiation, for the attraction of new market segments and for sharing principles and practices of transparency, solidarity and equity with the stakeholders.

Our research is affected by limitations regarding the size and the composition of the sample, which includes only few large urban destinations. Further studies could test the proposed hypotheses with a larger sample including even smaller destinations characterized by a fragmented governance model (d'Angella, De Carlo, Sainaghi, 2010), without a DMO that centralizes and guides processes of tourism development. Moreover, a larger sample allows carrying out regression analysis to assess causal relationships between the orientation towards sustainable communication and the adoption of sustainable policies.

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