



Wish you were here? Some problems associated with integrating marketing communications when promoting place brands

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Abstract Wales, a relatively small Celtic nation, has been forced to embrace the need to rebrand itself to meet the demands of an increasingly competitive global marketplace. The creation of unique, distinct identities that accurately reflect the contemporary rather than the historical place brand is becoming of even more strategic importance to those responsible for destination marketing, particularly in a newly enlarged European Union that is still seeking to grow in size even further.

This paper therefore examines some of the ways in which Wales is represented in order to assess the extent to which the wide range of the brand's marketing communications are in synergy, and to identify some of the problems associated with achieving such a consistent place image through marketing communications. A content analysis was undertaken in addition to semi-structured, in-depth interviews with members of a range of public bodies charged with promoting Wales externally. Analysis of the data immediately indicated inconsistencies within the marketing messages, thereby appearing to violate the 'one-voice' or synergy principle underlying the theories of integrated marketing communications. Following a discussion that highlights some of the problems associated with integrating marketing communications when promoting place brands, the paper concludes with the proposition that true integration of a place brand's marketing communications may be impossible to achieve.

Keywords: *Place branding, integrated marketing communications, Wales*

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INTRODUCTION

The argument put forward in this paper rests upon two assumptions. The first is that a place can be marketed. This assumption will be supported by the

literature on the marketing of places in general, and in particular the literature on destination branding. Following this assumption therefore it would appear logical to assume that the communication

of the destination brand, as with any other product or service brand, can and should be subject to a strategic approach to the marketing communications about that brand. The current dominant theoretical underpinning of strategic marketing communications is a desire for marketers to achieve integrated marketing communication (IMC). This paper not only examines some of the problems associated with implementing an integrated communications strategy when promoting place brands but also questions whether a totally integrated strategy is something to which place marketers should aspire.

Destinations as brands

Hankinson (2004) notes that 'the branding of places is now widespread'. Although Morgan *et al.* (2003) state 'it is well established that a destination is not a product', Morgan *et al.* (2002) found that among those responsible for marketing places 'destination branding is one of today's "hottest" topics', with Papadopoulos and Heslop (2002) finding more than 750 major publications in the last 40 years or so on the subject in its broadest sense. Despite this Morgan *et al.* (2002) claim that many academics have 'shied away' from entering the debate, 'arguing that places are too complex to include in branding discussions since they have too many stakeholders and too little management control, have underdeveloped identities and are not perceived as brands by the general public'. Indeed, Brown (1998) cites an earlier (Brown, 1995) critical essay on Kotler *et al.*'s (1993) text 'Marketing Places' that questions not 'whether the marketing concept ... *can* be applied' to what Brown refers to as such 'divergent domains' as place marketing, but 'whether it *should* be applied' at all.

Hankinson (2004) has identified that

'it is probably in the area of tourism marketing that place branding is most developed', but there tends to be a lack of such a strategic focus in this literature as 'marketing's contribution to travel and tourism has been undervalued or misrepresented, and misused' (Riege, 2000). Where marketing literature does apply in a strategic context it tends to focus on tourism planning and management, and 'the marketing of tourism ... becomes an application of the marketing process to specific characteristics of the tourism industry' (Wheeler, 1995). In order to take a strategic approach, issues such as target market segmentation should be attended to, and not just as 'a means of promoting a tourist zone to attract more people, regardless of the quality of experience that the tourists then receive' but also as 'the means whereby messages may be sent to people, indicating that perhaps the resort may not be for them' (Ryan, 1991, cited in Wheeler, 1995). This argument would therefore suggest that a strategic approach to segmentation issues in the marketing of tourism should be coupled with a strategic approach to marketing communications that are targeted at these segments. In order to attract the right segment(s) marketers attempt to tailor the most favourable message that will be best received by the potential customers in that segment. This view is shared by Leisen (2001), who argues that 'the traveler's choice of a given vacation destination depends largely on the favorableness of his or her image of that destination'. But this approach to tourism marketing is not without its challenges. By carefully segmenting the market into homogeneous groups or segments of potential consumers with similar wants, needs, behaviours etc, tourism marketers from a range of

public, private and non-profit organisations invariably find they are attempting to attract many diverse segments to the region, and it is likely that these segments each may have not just different but also conflicting needs, wants and behaviours (Hannagan, 1992). The messages designed to attract each different segment may also have to be vastly different in order to ensure the place is perceived as favourable by each different segment. Moreover, in order to create a favourable image, there is potential for a discrepancy between the actual place, 'warts and all', and its promoted image.

'Brochure locations are always happy, sunny, clean, non-crowded and populated by beautiful people and happy natives. Dilley (1986) has analysed the imagery portrayed in tourist brochures and demonstrated that the content is mostly scenery, hotels, beaches and swimming areas and to a lesser degree people, locals only posing as happy, welcoming, clean and non-threatening, never hungry, homeless or resentful.' (Wheeler, 1995)

Promoting a place's heritage – Fact or fiction?

Although there are potential problems with trying to ensure truthful representations in a place's marketing communications, it is the very nature of *re-presenting* a culture that is at the heart of much heritage tourism. Atkinson Wells (1994) notes 'the marketing of tradition comprises such phenomena as the transformation of tradition... cultural appropriation ... "fakelore" ... and cultural or heritage tourism'. It is this concept of 'fakelore' or manufactured cultural heritage that is central to the following debate.

Anholt (2002) notes that there is an under-researched relationship between national brand and national culture. He

also recognises that a 'primary means of communicating culture' is a nation's language, and that culture, cultural communications and perceptions of that culture and its communications can change over time, albeit slowly according to Bechhofer *et al.* (1999). Yet it has also been noted that 'the soul of a nation can, at one and the same time, hold onto and respect its past heritage while still looking and moving to the future. According to Renan (1996), this would not appear to be unusual.' (Skinner and Croft, 2001)

No matter how slowly a nation's culture is changing, with the stereotypical perception of that nation often lagging behind reality (Gilmore, 2002), when marketing heritage tourism there is a concern that what is being promoted is 'fakelore' (Atkinson Wells, 1994) and not a true representation of the past, and yet promoting the past, at least in terms of heritage tourism, is the big business of the present (Brown, 2001). Proctor and Kitchen (2002) note that the post-modern condition of hyperreality 'is typified by the virtual worlds of cyberspace and in the pseudo worlds of theme parks, hotels and heritage centres' as 'the postmodern consumer wants to experience the diversity of many themes, past and future, and not to become fixed in any single one'. Commenting on the recent 'reversion to retro' phenomenon and noting this yearning for times past, Brown (2001) discusses the plethora of 'refurbished Victorian pubs ... pseudo thirties tea shoppes ... fake fifties diners ... seen-one-seen-'em-all heritage centres (working smithy, weaving demonstrations, costumed attendants *et al.*) and Walt-Disney-ate-my-hamburger theme parks'. Contemptuous of many heritage parks, Brown (2001) refers to them as 'the archetypal retroscape — consumer society stencilled in phoney

stone — where sanitized past meets the supercilious present', and comments on the way in which these centres focus their attention on the stereotypical heritage of countries by concentrating on a time 'that is rarely, if ever, the present ... after all, if the "English" restaurant ... were truly contemporary, the menu would have to include hamburgers, samosas, pizzas and Marks and Spencer's boeuf stroganoff'. Brown also has much to say on the commercially and politically motivated growth of the 'Celtic Revival of the late nineteenth century' (a view echoed by Aherne, 2000) that he believes has led to the growing phenomenon of 'Irish' pubs, which 'can hardly be considered representative of today's Ireland, yesterday's Ireland, or any other Ireland this side of *The Quiet Man*' (Brown, 2001).

In an earlier work, Brown (1998) examined the way in which a romanticised view of Ireland and Irish culture was presented through the Riverdance phenomenon, but 'the Ireland it articulates is the Ireland of myth, of legend, of half-remembered historical facts', implying that factual representations of Ireland have 'been silenced, swallowed and scrubbed clean by the melodious, mellifluous, magical waters of Riverdance'. Goulding (2000), also researching from the post-modern perspective, believes that any commercially driven interpretation of history tends to become sanitised, entertaining and 'inauthentic, in order to appeal to popular tastes'. Aherne (2000) believes that 'while Celtic culture never actually existed as such, its representations are still alive and well, especially in highly commercialised, money-spinning forms such as Riverdance, Braveheart, Van Morrison, The Corrs and New Age spirituality generally (citing McCarthy 1998)'.

Creating a unique identity

With recent trends towards globalisation, and developments such as proposed further enlargement of the European Union (EU), proponents of convergence arguments claim that 'at its strongest it has been suggested that while societies are steadily moving together that the similarities between cultures will become much greater than their differences' (Pugh and Hickson, 2002). Although this argument may appear to be timely given the recent EU enlargement in May 2004, it was first proposed by Kerr *et al.* in 1960 (Pugh and Hickson, 2002). Authors such as Williams (1999) believe that for small nations such as Wales (within Britain) and Galicia (within Spain), this dilution of distinctive culture and identity has been happening over a much longer period of time. Therefore it may be that the marketing literature on branding, with its focus on unique identification, is most pertinent to destination marketers and those charged with creating, managing and communicating the unique proposition of a destination or nation brand. But Morgan *et al.* (2003), proponents of the branding approach, note that 'Anholt has argued that a more useful metaphor than "country as product brand" is "country as corporate brand"'. Whichever perspective is deemed most appropriate, it would appear that the argument that places can indeed be branded has few dissenters, although those that there are tend to generate 'violent reactions' and 'visceral antagonism' to the whole concept (Olins, 2002).

Examining the brand of a small European nation

Wales, along with other UK and Western European regions, has seen a

steady decline in traditional employment in manufacturing and heavy industry (Berg *et al.*, 1995; Lennon and Seaton, 1998), combined with an attendant rise in the growth and importance of the service sector in general (Grönroos, 2000) and the tourism industry in particular. European cities and regions, many forced to embrace this trend through economic necessity, are often faced with the need to develop new viewpoints, new strategies and new skills bases (MacLaren, 1996; Welsh European Partnership and National Assembly for Wales, 2004; Skinner, 2002).

The National Assembly for Wales (NAfW) was officially opened on 26th May, 1999, with the formal transfer of powers from Westminster to the NAfW taking place on 1st July that year. In 1999 Ron Davies AM, MP announced that he wanted 'to rebrand Wales and notions of Welshness to reflect the real living modern Wales, to establish the idea of Wales as a vibrant, diverse, tolerant and outward-looking country with an internationalist spirit' (Davies, 1999). Since that time the country's current First Secretary of the Welsh Assembly Government, Rhodri Morgan, has called for all members of 'Team Wales' to share a 'common vision' for a 'better Wales' that allows a celebration of national heritage and the Welsh language while still being perceived as a forward-looking international nation. It is in particular the redevelopment of the Cardiff Bay area (formerly Tiger Bay), now home to the NAfW and site of many of the capital city's tourist attractions, visitor centres, shopping centres, leisure and recreation facilities and outdoor summer festival activities, that has received wide media attention, and has been cited as one of the driving forces behind the rebranding of Wales.

Communicating the brand through integrated marketing communication (IMC)

The concept of IMC was initially promoted by advertising agencies in the early 1980s attempting to enhance cooperation between different agencies dealing with specialised areas of an organisation's advertising accounts and as an attempt to combat 'turf wars' within and between advertising agencies (Cornelissen and Lock, 2001). Since the early 1990s IMC has become a 'central theme in corporate and marketing communications' (Cornelissen and Lock, 2001). IMC is defined by the American Association of Advertising Agencies as 'a concept of marketing communications planning that recognizes the added value of a comprehensive plan that evaluates the strategic roles of a variety of communications disciplines, eg general advertising, direct response, sales promotion and public relations — and combines these disciplines to provide clarity, consistency and maximum communication impact' (cited in Eagle and Kitchen, 2000).

Cornelissen and Lock (2001) identify that the key to integration is therefore 'the facilitation of increased forms of interaction between communication disciplines' in order to sustain competitive advantage, and includes 'co-operation from communication specialists ... avoidance of duplication of efforts and materials ... accessing gains through combined forms of planning and execution ... as well as by visually consistent and strategically planned communications'. Underlying this increased interaction within IMC is the 'one-voice' principle of synergy between all marketing messages and between all media and communications channels used, and its 'effective implementation requires reassessment of the coordination and control of

marketing communication programmes' (Eagle and Kitchen, 2000).

Pickton and Broderick's (2000) wheel of IMC has been proposed as 'a new concept to represent the marketing communications mix'. This model identifies no fewer than 21 different promotional activities within the main four elements of the marketing communications mix, and many of these activities overlap (for example, direct mail may be perceived as sales promotion or as advertising; corporate advertising as both public relations and advertising etc). One activity identified in Pickton and Broderick's (2000) wheel is that of managing corporate identity — the process of forming an organisation's identity from its history, beliefs, philosophy, ethical and cultural values, its ownership, its people, the personality of its leaders and its strategies (Ind, 1992). The NAFW has announced its desire for a 'Team Wales' approach that may be indicative of a move towards integration and an attempt to manage the identity of Wales. In an examination of the way in which these concepts may apply to Wales in marketing terms, and appearing to concur with Anholt (2002), Skinner *et al.* (2001) note that:

'a nation could be defined as either a brand or corporate identity. However, commercial organisations that fashion new corporate identities may also brand their products and services in order to differentiate these from other offerings, and to communicate positive brand values to consumers. It would seem that here is where the confusion between national branding and corporate identity has begun ... It would therefore seem that the process of refashioning national identities can be best understood in terms of the creation and communication of corporate identity and corporate image, while the outputs of that nation, its products and services, may be perceived in branding terms.'

Regardless of whether the place should be thought of in terms of branding or corporate identity, the practical and managerial implications for IMC when applied to place marketing still remain.

Barriers to implementing IMC

Eagle and Kitchen (2000) note that 'IMC and integrated corporate communications — still offer many problems and dynamic issues of control and coordination that have yet to be substantively addressed in the literature'. The literature does, however, identify the main barriers to implementing IMC as issues of power, control, lack of corporate direction, lack of skills and resources, fear of change and lack of flexibility (Cornelissen and Lock, 2001; Eagle and Kitchen, 2000; Pickton and Broderick, 2000). When applied to marketing place brands, Anholt (2004) has also questioned the feasibility of achieving coordinated communications due to the diversity of the stakeholders involved and the diversity of the interests each group pursues.

RESEARCH METHODS

The literature has identified some of the inherent general problems associated with achieving IMC (Cornelissen and Lock, 2001; Eagle and Kitchen, 2000; Pickton and Broderick, 2000), and has started to question the feasibility of achieving such integration for place brands (Anholt, 2004). It has also been suggested that some of these problems may arise due to the varying and often conflicting interests of the key stakeholders responsible for coordinating such an integrated approach (Anholt, 2004). The focus of this paper is, therefore, to identify more clearly some of the specific problems associated with achieving IMC for place brands. As Hankinson (2004) identified that place

branding is most developed in the area of tourism marketing, the focus will be on the ways in which Wales is promoted as a tourism destination.

In order to achieve this focus a content analysis was undertaken of various communication messages representing Wales as a brand sent by the nation's key stakeholders. This would appear to be an appropriate methodology to use to study marketing communications, as Kassarjian (1977) found that content analysis studies the message itself, not the intentions of the communicator or the way in which the intended recipient interprets meaning from it. The analysis was undertaken following Weber's (1990) eight steps towards 'creating and testing a coding system'. This was done in order to identify the most frequent themes arising in the marketing communications under investigation (Weber, 1990). Krippendorf (1980) also identified frequency of occurrence as a means of overcoming category reliability problems, as frequency can aid in identifying those elements of the message that may measure importance, attention or emphasis. In addition, Krippendorf (1980) identified two other indicators that may help overcome category reliability: the balance between the numbers of favourable or unfavourable attributes directed towards a symbol, and also the value expressions made towards a symbol. Therefore, data were analysed for frequency of occurrence of key words, regardless of whether these words were mentioned in a favourable or unfavourable context. In addition, the symbolic elements expressing Wales' cultural values were identified from images appearing within the data.

Data were sourced from the following key documents and websites produced by, in conjunction with or sponsored through funding by the Welsh Assembly

government. (Due to the specific focus of this research, elements of these documents that related to issues not under investigation, such as health and education, were ignored.)

- 'www.betterwales.com: The First Strategic Plan of the National Assembly for Wales' (National Assembly for Wales, 2000). This plan outlines the means of achieving the 'long-term vision for a better Wales', and details 27 benchmarks for evaluating successful achievement of the plan by 2010. These benchmarks include an evaluation of the success of Welsh branding and the successful attraction of tourists to Wales. This document was included for two reasons: first as the Welsh Assembly government is one of the key stakeholders responsible for coordinating and delivering the messages concerning Brand Wales, and secondly as the Welsh Assembly government funded the Wales Tourist Board's (WTB) £22.6m budget for 2002.
- The NAFW 'culture and recreation' webpage, included as its strategies should be consistent with those of the WTB (www.wales.gov.uk/subiculture/index.htm).
- The 'Single Programming Document for West Wales and the Valleys', produced by the Welsh European Partnership and the NAFW in order to maximise the opportunities for and benefit of European structural funding allocated to the region. This document is included as it outlines the new and updated strategies of relevant public bodies since the commencement of the NAFW, including the WTB (Welsh European Partnership and National Assembly for Wales, 2004).
- The WTB annual report — promoted

as the means whereby readers may 'study the performance of the WTB and industry' (www.wales-tourist-board.gov.uk).

- The WTB marketing campaign for 2002, 'Wales — The Big Country', viewed on various WTB websites (www.wales-tourist-board.gov.uk; www.i.visitwales.com; www.visitwales.wtb.lon.world.net).

As this research has been undertaken from a broadly interpretivist perspective that would lend itself towards qualitative methods, further data were gathered from semi-structured in-depth interviews with members of a range of public bodies charged with promoting Wales externally. Interviews were thematically analysed under the headings arising from the content analysis. This is in keeping with the nature of the primary method of content analysis that is best done by combining quantitative and qualitative approaches which would appear to be 'antithetical modes of analysis' (Weber, 1990).

FINDINGS

The content analysis gave rise to a number of frequently occurring themes under which the findings will be presented. Analysis of the data immediately indicated inconsistencies within the marketing messages, thereby appearing to violate the 'one-voice' or synergy principle underlying IMC.

The essence of Brand Wales

Immediate inconsistencies concerning the essence of Brand Wales appeared to arise within two of the key documents sampled: 'www.betterwales.com: The First Strategic Plan of the National Assembly for Wales', and the 'Single Programming Document for West Wales

and the Valleys'. Table 1 identifies the frequency of occurrence of words associated with the Welsh Assembly government's 'guiding themes and values' of sustainable development, tackling social disadvantage and equality of opportunities, and issues surrounding partnership working with members of Team Wales, improvements in the economy through the skills of the nation's workforce, plans for tourism, the branding of Welsh products and services and issues of culture and language. Table 2 identifies whether these have been referred to favourably, and Table 3 identifies whether these have been referred to unfavourably.

The NAFW is attempting to brand Wales as a nation 'United, confident and creative; Committed to fostering its unique and diverse identity, and the benefits of bilingualism, while looking confidently outwards and welcoming new cultural influences; Prosperous, well-educated, skilled, healthy, environmentally and culturally rich' (National Assembly for Wales, 2000). Therefore it is unsurprising that there is a high frequency of favourable associations concerning the way Wales is represented in this document, and a low frequency of unfavourable associations.

Although produced in partnership with the National Assembly for Wales, the 'Single Programming Document' notes that 'problems of low earnings and deprivation reflect a level of GDP only 73% of the European Union average'. In a region where 22 per cent of unemployed people who are claiming benefit have been without a job for over 12 months, 'although there is a base of traditional skills, skill levels in the population generally tend to be low and there is underachievement in terms of qualifications ... The standard of basic

Table 1: Brand Wales: Core attributes — Frequency of occurrence

	Sustainability	Social disadvantage	Equality	Team Wales	Partnership	Economy	Skills	Tourism	Products and services	Culture and language
www.betterwales.com	54	30	43	4	76	68	24	13	5	16
Single programming document	99	35	43	2	81	279	253	83	23	52

Table 2: Brand Wales: Core attributes — Favourable associations

	Sustainability	Social disadvantage	Equality	Team Wales	Partnership	Economy	Skills	Tourism	Products and services	Culture and language
www.betterwales.com	54	30	38	4	76	59	20	13	5	16
Single programming document	99	10	41	2	79	225	170	77	22	52

Table 3: Brand Wales: Core attributes - Unfavourable associations

	Sustainability	Social disadvantage	Equality	Team Wales	Partnership	Economy	Skills	Tourism	Products and services	Culture and language
www.betterwales.com	0	0	5	0	0	9	4	0	0	0
Single programming document	0	25	2	0	2	54	83	6	1	0

literacy and numeracy post-16 is far too low and Wales lags behind the rest of the UK in terms of the level of qualifications in the workforce' (Welsh European Partnership and National Assembly for Wales, 2004). This document included a higher frequency of unfavourable associations with some of the key attributes relating to Brand Wales. As examples, where the strategic plan of the NAFW for Wales identifies plans for tackling social disadvantage with no unfavourable mentions of its continuing occurrence, the 'Single Programming Document' identifies problems associated with those in the community who are currently disadvantaged 25 times (71 per cent of occurrences); where the strategic plan of the NAFW identifies plans for an 'improved', 'stronger', 'more diverse', 'new' Welsh economy 59 times, with only nine mentions of current problems (13 per cent of total occurrences of economic associations), the 'Single Programming Document' identifies problems associated with current economic 'decline' and 'inactivity' 54 times (19 per cent of occurrences). Similarly, when discussing the skills of the workforce, the strategic plan of the NAFW only mentions skill shortages four times (16 per cent of occurrences), yet the 'Single Programming Document' refers to Wales' low skilled or unskilled workforce 83 times (32 per cent of occurrences). The strategic plan of the NAFW mentions no unfavourable associations towards tourism, yet the 'Single Programming Document' identifies the decline in Welsh tourism and the negative environmental impacts of tourism a total of six times as opposed to the 77 times it is favourably mentioned.

From one perspective this would appear to be sending out contradictory

messages about the very essence of the national brand; from another it could be seen as tailoring marketing communication to meet the strategic objectives of public bodies when dealing with different segments.

Welsh language, cultural heritage and diversity

As a strategic plan, and utilising such tools as SWOT analyses, the 'Single Programming Document' presents the weaknesses of Wales as well as the region's strengths. The document notes one of the country's strengths as being 'Welsh culture, and particularly the Welsh language, [that] contributes to the distinctiveness of the region'. While presenting the fact from a recent Census that only 'a half million people in Wales (19% of the total population) speak Welsh', this strength leads to the identification within the document of an opportunity for key industries 'to emphasise the distinctiveness of Wales, and to develop awareness of "Welshness" as a marketing tool in certain product areas' (Welsh European Partnership and National Assembly for Wales, 2004). This document goes on to outline a new updated strategy for the WTB, which includes a sustainable approach to tourism development designed to enhance 'Wales' unique environmental and cultural assets', noting that 'the uniqueness of Wales' history, language, culture and way of life are distinctive assets essential to sustaining a well balanced tourism industry'. The strategic plan of the NAFW is also positive about Wales' culture: 'We are one of the oldest nations in Europe with our own language and a rich and diverse cultural inheritance' (National Assembly for Wales, 2000). The importance of the Welsh language to public policy makers was also evident from analysing data

from the NAFW. The NAFW website's index promoted a link to 'Culture, Sport and Welsh Language'. This would suggest it would be offering information on each of those three issues. The link was actually to a webpage entitled 'Culture and Recreation' that detailed only the NAFW's Welsh language policies. A further detailed search of the site was required to access information pertaining to any other cultural or recreation issues.

The Welsh language would therefore appear to be central to issues of Welsh culture, yet less than 20 per cent of its population speak the language. Wales also has a large multicultural community that contributes to the nation's cultural diversity, yet is all but ignored in its promotional messages. From the semi-structured interviews, one black respondent, responsible for implementing certain government 'New Deal' initiatives, noted 'at the peak of the Bay's time, the peak of the docks, there were more nationalities in that one square mile than any other place on the planet ... it's a big community base, Wales. It's a melting pot. I'm black and I'm Welsh. I love Wales, I love being Welsh, and I love telling people as well.'

Wales has also suffered from its own historic stereotypical images such as 'coal mines; slate quarries; rugby union; *eisteddfodau*; druids; daffodils; sheep and dragons ... male voice choirs; harps; Tom Jones; Shirley Bassey and a handful of dodgy rock 'n' rollers' (Owens, 2000). A journalist was interviewed for this study who noted:

'Being Welsh, and Welshness, is seen much more differently now. I think it almost seems trendy. It's new. The explosion of everything Welsh has just been amazing through the last few years ... it's almost like a new acceptance of things Welsh. And also with devolution we're seen as positive, you know, a new

positive nation, we've got our own identity, we're helping one another and it's just a great image for the rest of Britain to see.'

The NAFW strategic plan does note that it is 'the people from Wales who have made a major contribution in all walks of life in the UK and internationally ... We have musicians with world-wide reputations in everything from opera to rock. As a nation of only 3 million people, we are more than pulling our weight.' Yet there were no specific images or references to Wales' reputation as the 'land of song' on any of the WTB's webpages sampled for this research, although these pages did give links to 'Cultural Wales'.

Mountains and lakes

The strategic plan of the NAFW notes that 'our landscape is a major asset, making Wales not only a first class place to visit but also an exceptional location for business'. Tourism information on the NAFW website also tends to concentrate on the region's 'breathtaking scenery'. This is reflected in most of the WTB's promotional messages. The WTB's 'Wales — Big Country' campaign states its aim is to 'promote a new and challenging identity for Wales', yet the nine flashing images on the 'video wall' of one of the WTB's websites (www.i.visitwales.com) offer further information on the relatively traditional and stereotypical:

- Llandudno pier — presenting images of a traditional UK seaside resort, deckchairs and a funfair
- Celtica — with ancient Celtic images
- Coed-y-Brenin — offering panoramic views of mountains, lakes and cycling holidays
- Laugharne boathouse — photographic images of Dylan Thomas's writing workshop and memorial statue

- Dan yr Ogof — caves, dinosaurs and ancient dwellings
- Carmarthenshire — pony trekking and scenic sunsets
- Cardigan go-karting — action images of go-karts
- Hay-on-Wye — bookshops and images of local scenery (mountains and lakes)
- Caernarfon — the castle and a picture of a well-known BBC TV presenter.

Red, white and green – Here be dragons

Unsurprisingly, given the emblem of Wales — the Welsh dragon and the red, white and green colours of the Welsh flag — these images and colours consistently appeared in the range of promotional material analysed within this study. But what was not consistent was the manner in which they were portrayed, neither between organisations nor within them.

- The WTB's logo is of a red dragon between the words 'Wales' and its Welsh translation, 'Cymru'.
- The WTB's www.i.visitwales.com website displays this logo against backgrounds of blue, bright green and gold, the 'official' WTB website displays the same logo on backgrounds of red, khaki green and gold, with images of mountains, the seaside, castles, activity holidays and a lone image of Wales' multicultural community.
- The www.wales-tourist-board.gov.uk website displays the same dragon but encompassed in a green ellipse, with no text in either English or Welsh, against a background of red and green.

The following comment (recorded with permission) was made to a marketing

student from a manager within a Welsh public body responsible for promoting the region outside of the tourism industry:

'You've got the tourist board going out and promoting Wales as beaches and rolling hills, you've got the Assembly, well they're not really sure what they are doing! They've got a *silver* dragon! They actually go out and promote themselves as anything! ... everybody's got these different strap lines and, it's just confusing! There's no consistency there ... Discussions apparently take place between these bodies [about developing an integration system] but nothing on the scale that should be undertaken.'

DISCUSSION

At the outset it was noted that the argument within this paper rests on two assumptions. The first was that a place could indeed be marketed. This assumption was supported by most authors on the topic, who agree that places can be, are being and should be branded (Kotler *et al.*, 1993; Leonard, 1997; Gilmore, 2002; Olins, 2002; Morgan *et al.*, 2002; Proctor and Kitchen, 2002; Morgan *et al.*, 2003; Hankinson, 2004), with Brown (1998) as a notable dissenter, and other academics found by Morgan *et al.* (2002) to have 'shied away' from entering the debate. Those authors who do agree that nations can indeed be branded believe that such branding can bring about competitive advantage (Kotler *et al.*, 1993; Leonard, 1997; Proctor and Kitchen, 2002). Although there is discussion about whether the application of marketing concepts in practice should be those of branding or corporate identity (Skinner *et al.*, 2001; Anholt, 2002; Morgan *et al.*, 2003), both of these concepts can be considered as suitable for an IMC campaign (Pickton and Broderick, 2000).

This leads to support of the second assumption, that the marketing communications of a place brand can be integrated.

The problems arise, however, when examining the components of the place, including its heritage. Authors such as Atkinson Wells (1994) are concerned that what is promoted is not a true reflection of the reality of the place, but amounts to the promotion of 'fakelore', a view that is also shared by Aherne (2000), Goulding (2000) and Brown (1998; 2001). Authors writing on the topic of nationalism and identity such as Renan (1996) believe that it is possible for a nation to be both proud of its history and forward-looking at one and the same time. Proctor and Kitchen (2002) note that the post-modern condition of hyperreality affects consumers of places in that they are open to and even demanding of these apparent contradictions, wanting to consume past and present at one and the same time themselves, especially in an era that is experiencing the 'reversion to retro' phenomenon (Brown, 2001), and a 'Celtic Revival' (Aherne, 2000; Brown, 2001).

Wales, a Celtic nation, has been forced to embrace a growing trend in Western Europe towards the development of the service sector, particularly tourism, due to the decline of heavy industry. This has brought about the need to rebrand the place to meet the demands of an increasingly competitive global marketplace. This is becoming of even more strategic importance to those responsible for destination marketing, particularly in a newly enlarged EU that is still seeking to grow in size even further. Proponents of the convergence arguments believe that similarities between nations 'will become much greater than their differences' (Pugh and Hickson, 2002), yet the proponents of

the argument that destinations can be branded seek to do so by creating a unique identity for the destination brand that will lead to competitive advantage. Supporters of IMC believe that it can be used 'to sustain competitive advantage' (Cornelissen and Lock, 2001), and there are many examples of places that have successfully refashioned their identities to gain and maintain this advantage (Leonard, 1997; Gilmore, 2002; Olins, 2002).

Marketing theorists would propose that this new positioning concept for the rebranded place should be evident through consistency of its IMC, yet rather than evidence of a consistent positioning concept being communicated, there would appear to be conflict and incongruence between messages communicated by those that would like to promote a place rich in national heritage and cultural identity and those who would wish that place to be perceived as a forward-thinking, outward-looking international nation.

Although Wales now has many modern and updated symbolic images upon which to draw, the stereotypical images remain very evident within the region's marketing communications. Despite the attempts of the region's marketers from all sectors, the Wales that is being promoted, similarly to the Ireland of Riverdance, may well be portraying a romanticised, even manufactured image that bears little relevance to the present day, 'that never existed and doesn't exist' (Brown, 1998). Yet the Wales that does exist, and that is embraced as 'positive' by its own nationals, does not seem to be promoted outside of the region by those aiming to attract tourism, who appear to prefer to rely upon stereotypical, historic 'fakelore'.

Apart from the inherent problems associated with destination branding, there are also problems of implementing

IMC when promoting place brands. It would appear that the whole concept of IMC was commercially driven by advertising agencies seeking to keep a client's entire business, and to fight off 'turf wars' with competing agencies (Cornelissen and Lock, 2001). This could lead to a questioning of the entire theoretical foundations of IMC, let alone its applicability in promoting place brands that are outside the normal scope of product and service brand promotions.

Eagle and Kitchen (2000) note that effective implementation of IMC 'requires reassessment of the coordination and control of marketing communication programmes', yet lack of integration was recognised from an interview respondent working with the organisations responsible for these programmes.

One of the underlying principles of IMC is the 'one-voice' synergy between all marketing messages and between all media and communications channels used. Successfully implemented, IMC campaigns comprise 'visually consistent and strategically planned communications' (Cornelissen and Lock, 2001). When examining the communications of the organisations under investigation for this study, there were many visual inconsistencies both within and between organisations, exemplified by such design aspects as different logos and inconsistent use of colour. It was also hard to evidence much message consistency, or integration, contained in the strategic planning documents under investigation. Again, this was not surprising, especially given the potential differences in objectives of the organisations that produce them. The NAFW promotes a Wales that is 'prosperous, well-educated, skilled, healthy, environmentally and culturally rich', yet the 'Single Programming Document' talks of a Wales with 'problems of low earnings and deprivation'.

The WTB is keen to promote Wales' 'cultural assets', noting 'the uniqueness of Wales' history, language, culture and way of life'. The promotion of the place's culture would therefore appear to be inextricably linked with language (Anholt, 2002), but Welsh is only spoken by 19 per cent of the population, again increasing the potential for consumer dissatisfaction when what is being promoted about the place is contrary to the reality of the place.

The multicultural nature of the place is also not recognised in its marketing communications, and this would appear to be typical of the stereotypical ways in which those from minority groups are excluded from certain types of advertising (Gronhaug and Heide, 1991).

Also, as outlined earlier, the question remains of whether it is at all possible to achieve true integration of marketing communications when many different messages may need to be directed to many diverse target market segments (Wheeler, 1995; Anholt, 2004) and when meeting the needs of one segment potentially reduces the possibility of meeting the needs of another (Hannagan, 1992).

CONCLUSION

Regardless of whether the place should be thought of in terms of branding or corporate identity, the practical and managerial implications for IMC when applied to place marketing still remain. These have been identified by Cornelissen and Lock (2001), Eagle and Kitchen (2000) and Pickton and Broderick (2000) as issues of power, control, lack of corporate direction, lack of skills and resources, fear of change and lack of flexibility.

It appears that fear of change and lack of flexibility are evident in the case examined for this paper. As an example,

the WTB states it wishes to 'promote a new and challenging identity for Wales', yet perpetuates stereotypical images on its websites.

A journalist's view is that Wales has indeed created a new, positive, rebranded place. But this new, rebranded, refashioned image has been created by the people, businesses and public sector leaders of Wales, and there is no one brand manager overseeing or guiding the process.

Representatives of organisations involved in promoting Wales would appear to be aware of this lack of consistency, acknowledge the difficulty of coordinating a coherent and consistent approach and recognise that different target market segments require different messages. Key words and phrases identified in the content analysis are not common to all sectors, which would appear to be a violation of the one-voice principle underlying IMC. It would also appear that internal communication between the organisations that make up 'Team Wales' is key to creating an integrated approach to marketing communications, yet while each organisation is competing in some way for market share, and differentiation is proposed as the way to obtain competitive advantage, it is difficult for such an integrated strategy to be adopted. While those responsible for promoting tourism continue to focus on, in the main, stereotypical, historic or cultural/language issues, they may be losing out on the potential to attract new target market segments to the region, and true integration of the region's marketing communications may be impossible to achieve.

The aim of this research was to identify some of the specific problems associated with applying the principles of IMC to the promotion of a region as a

tourism destination that may be evident in addition to the general barriers to implementing IMC. These may be summarised as follows.

Wide range of diverse stakeholders

A number of different organisations from a range of private, public and not-for-profit sectors may be involved in creating the marketing messages about the place. IMC has been found to be difficult to manage within any one organisation, especially larger public bodies, thus it may be unmanageable across such a wide range of organisations.

Diversity of, and conflict between, stakeholder objectives

IMC is regarded as a tool to gain sustainable competitive advantage, yet each of these organisations has its own interests and is competing for its own market share within the place, which begs the question of whether IMC is ever likely to be achieved in tourism marketing.

Lack of coordinating function

Finally there is the issue of the nature of the region and its marketing communications management. Wales, for example, is promoted by the WTB which in turn is funded by the Welsh Assembly government. Yet within Wales there are different regional tourism networks, and many private, public and not-for-profit organisations seeking their share of the tourism market. In the private sector this activity is usually overseen by a brand manager, yet it is difficult to establish the identity of the brand manager for Brand Wales — would it be a senior executive of the WTB, a member of the government? Or

is it impossible for a region's 'brand' to be managed in such a way?

Further research could widen the scope of the data to be analysed, taking into account the promotional messages of a much wider range of organisations of different sizes from a cross-section of public, private and not-for-profit sectors. Given the general problems associated with implementing an integrated marketing communications campaign for product or service brands within the private sector, however, and the more specific problems identified here that relate to place brands, the findings from this research suggest that it is not only appropriate but also necessary to formulate a revised and more applicable approach to marketing places that is not bound by the principles of IMC. It is proposed that this new approach should reflect not only the diversity of the place brand itself and the diversity of those responsible for communicating the place brand, but also the diversity of the key target segments of intended message recipients. An approach, therefore, that challenges accepted marketing communications theory, an approach that seeks heterogeneity rather than homogeneity.

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