ISCTE Business School
Instituto Universitário de Lisboa

CASE STUDY:

LISBON - A DREAM DESTINATION?

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- Spine –

RESUMO

O turismo é um fenómeno marcante do século XXI, assumindo importância nas mais variadas esferas que compõem a vida em comunidade, constituindo uma égide económica, política, cultural e social difícil de encontrar em outros sectores da sociedade.

Este caso pedagógico insere-se nessa problemática, partindo de um conjunto de tendências de turismo internacionais para a focalização num destino específico, a capital de Portugal, Lisboa.

Tendo em vista uma discussão globalizante e integrante dos diversos temas que confluem para a gestão estratégica e promoção de um destino turístico enquanto marca, serão apresentados um conjunto de dados que servirão de base para um estudo aprofundado do mercado turístico lisboeta, avaliando primordialmente as dimensões de posicionamento e imagem percebida do destino, partindo ainda de determinadas características que definem o perfil do seu público-alvo.

Lisboa enquadra-se num cenário competitivo forte, no qual procura distinguir-se dos principais destinos Europeus através de uma estratégia holística que tem por base um alinhamento entre os diversos produtos turísticos da cidade e região e que contribuem para o seu posicionamento genérico enquanto destino turístico.

Para facilitar o entendimento do caso será efectuada uma abordagem ao tema de marketing estratégico de destinos turísticos, no que toca sobretudo aos conceitos de marca, imagem e comportamentos do consumidor em turismo.

O cariz pedagógico é atribuído pela actualidade e recente importância de Lisboa no panorama internacional do turismo espelhando uma perspectiva futura optimista e contribuindo decisivamente para a alavancagem da sociedade portuguesa, não só a nível económico como também social e espiritual.

Palavras – chave: Comportamento do Consumidor, Posicionamento e Imagem de Marca, Marketing Estratégico de Destinos Turísticos, Lisboa

JEL Classification System: M31 - Marketing

L83 - Sports; Gambling, Recreation; Tourism

ABSTRACT

Tourism is a noticeable phenomenon of the XXI century, assuming critical importance in the several spheres that compose life in community, constituting an economic, political, cultural and social aegis hard to find in other areas of society.

This case study is edged under this problematic, starting from a set of international tourism trends to focus on a specific destination, the capital of Portugal, Lisbon.

Key facts will be presented, seeking for a globalizing and integrating discussion around the diverse themes that comprise the strategic management and brand promotion of a tourism destination, involving a deep study of the Lisbon tourism market, primarily evaluating its perceived image and positioning dimensions and relating to its specific target markets profile characteristics.

Lisbon is framed on a strong competitive scenario, striving for a differentiation relatively to the main European destinations through holistic strategies based on a principle of alignment between the several tourism products of the city and region that contribute for its overall positioning as a destination.

A literature review will be presented, in order to contribute for a generic comprehension of the case study, highlighting key concepts of destination strategic marketing, such as branding, image and consumer behavior in tourism.

The educational character is attributed by the hot topic and recent importance of Lisbon in the international tourism panorama reflecting an optimistic future perspective, aiming at decisively contributing to the leverage of the Portuguese society, not only at an economic level, but also considering a social and spiritual dimension.

Keywords: Consumer Behavior, Brand Positioning and Image, Destination Marketing, Lisbon

JEL Classification System: M31 - Marketing

L83 - Sports; Gambling, Recreation; Tourism

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1.1. Background Issue: Lisbon – A dream destination?

Diogo had the dream of travelling around the world. Originally from Lisbon, he managed to live and travel to different world destinations, from Europe (UK, France, Spain, etc.) to Asia (Hong Kong, Singapore, Malaysia, etc.) or Africa (Angola). Each destination provided him remarkable experiences, a blend of emotions and feelings signifying unique meanings attributed to each destination.

The stimulus of meeting new people and cultures, getting other perspectives of the world and defying the challenge of experiencing diverse continental stages were always a motivation. Hence, the higher the mountain, the bigger the challenge. That was what he felt while climbing the Mount Kinabalu, a 5.000 meter mountain in Malaysia. Despite the obvious fatigue, the misfortune of a recent motorbike accident in the Philippines and a sudden thunderstorm along the climbing, nothing was comparable to the image of the sunshine in the top of that mountain. Undoubtedly, one of the most treasured recalls he certainly has.

Continuing the trip around Asia, he visited Tai Po, Hong Kong, where a wishing tree marks a ritual in which visitors should write down their wishes in a paper attached to oranges onto branches, throwing it against the tree. If they hang, the wishes will be realized. Spiritualism and mind liberation outlined that experience. From tradition to modernity in Mong Kok, everything pointed out to shopping, due to an immense area full of markets and entertainment!

Good vibrations were present everyday with the Angolan rhythms of Kisomba and Kuduro, expressions of a cultural resistance of a nation, an anthem to the celebration of freedom. Culture and history were also key reasons for him to live in Paris, remembering the traditional and unforgettable visits to the Eiffel Tower and Notre Dame Cathedral. Remarkable was also London, always looking at the clock of Big Ben, observing the seconds passing by at the speed of light. What a vibrant city!

Coming back to his hometown, he decided to revisit the Belem Tower and to visit for the first time Sintra´s Palácio da Pena, two world heritage sites recognized by UNESCO. Ancestry was the word that immediately came up to his mind, observing splendid architectural demonstrations of history. Similarly, walking around Baixa - Chiado area, he started to imagine how Lisbon was in the old times, whereas the visits to the modern and business area of Parque das Nações remembered the extraordinary Expo 98´, a world showpiece of different cultures and backgrounds.
Throughout his childhood, he was used to travel between Lisbon and Leiria to visit his family. Once, returning home, he said to his parents “Are we in Las Vegas? It is so shining!” Was his perception right? Is Lisbon a dream destination?

1.2. Case Study Context

1.2.1. International Tourism

1.2.1.1. Global Tourism Outlook

Despite the downward pattern registered in 2009 due to the overall world economic crisis, international tourism presents positive prospects for the future, forecasting 1 billion inbound tourist arrivals in 2012 (*Table 1*).
Europe continues to be the regional area with the higher number of inbound tourist arrivals with around half of total. Even though, Europe is the continent with the lowest growth between 2008 and 2011. In 2011, Eastern Europe is expected to increase in 5,6% compared to the 1,5% of the projected evolution for the EU15.
Asia is the continent with the highest progress, rising 11% between 2009 and 2010. Furthermore, it is the region which is expected to grow more in 2011 and 2012.
Contrastingly to the major continents regarding inbound tourist arrivals, Africa did not have a descending trend in 2009, registering a constant development since 2008 till 2012 (forecast).
Latin America is driving the growth of inbound tourism in the American continent, with predicted increase of 9,4% from 2011 to 2012, compared to the expected 4,3% of North America.

Table 1 - Inbound Tourist Arrivals: Overnight Visitor Growth (Millions)

Region	2008	2009	2010	2011*	2012*
Americas	147,3	140,5	148,6	154,3	162,5
Europe	480	451,4	461,2	472,9	490
Asia	179,7	175,3	194,7	209,8	224,6
Africa	61,1	62,5	66,8	68,7	70,5
Middle East	47,7	45,6	50,9	54,4	56,4
Total (World)	915,8	875,3	922,1	960,1	1003,9

Source: European Travel Commission
*** Forecast for 2011 and 2012**

Regarding outbound tourist visits, Europe is also the continent that catalogs the highest number of residents travelling in another country, but presenting the slowest recovery in terms of visitor forecasted growth, being expected to increase to higher levels than the ones of 2008 only in 2012. Asia is again the fastest growing continent, reaching a 10% evolution between 2009 and 2010, followed by Middle East with 7,6% and Americas with 6,8%.

Latin America is forecasted to present the highest % change in outbound visits in 2011 with 11,2%, whereas Oceania (included in the Asian group according to the European Travel Commission) was the region that recorded the superior increase of all with 11,7% from 2009 to 2010 (*Table 2*).

Table 2 - Outbound Tourist Visits: Overnight Visitor Growth (Millions)

Region	2008	2009	2010	2011*	2012*
Americas	137,9	134,6	143,8	149,4	158,5
Europe	571,4	535,2	549,6	568,4	586,6
Asia	250,7	250,5	274,6	299,1	321,5
Africa	37,9	35,1	37	38,3	40,3
Middle East	71,4	63,5	68,3	73,4	77,6
Total (World)	1069,4	1018,9	1073,2	1128,6	1184,5

Source: European Travel Commission
*** Forecast for 2011 and 2012**

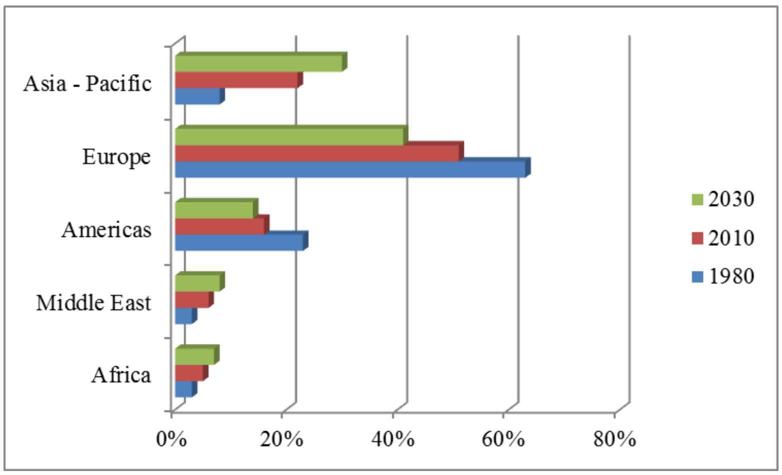
1.2.1.2. Trends in International Tourism

According to the World Tourism Organization (WTO) within the study "Tourism towards 2030", the international tourist arrivals will reach 1,8 billion in 2030 assuming a positive growth mainly driven by emerging economies, who are likely to overtake the advanced economies in inbound tourism by 2015. Europe will continue to be the region with higher number of international tourist arrivals, and Asia - Pacific will be the fastest growing region.

In fact, if we consider an evolution of the shares of each world area in the international tourism, the Americas and specially Europe significantly decrease their shares from 23% and 63% in 1980 to 16% and 51% in 2010 respectively, forecasting a constant decrease till 2030.

Adversely, Asia represented only 8% of the international tourism shares in 1980 while it is expected to reach 30% in 2030 (*Chart 1*).

Chart 1 - Regional Shares (%) per Tourist Arrivals (in 1980, 2010 and Forecast for 2030)



Source: UNWTO World Tourism Organization

Asia is the paradigm for the enhancement of the emerging economies in the international tourism scenario proven by the rising demand and increasing middle class in those societies. Contrastingly, Europe has registered lower levels of economic growth than in past decades.

Alongside with those relevant economic aspects, also socio-demographic characteristics have a big impact on tourism. According to Eurostat, between 2010 and 2030, the overall population growth in Europe should be of around 0,2%, while the evolution of the population with more than 65 years old should be of 1,7% revealing a rising aging population. This has potential impacts on

tourism, with the escalating "Silver Age" market (acronym for seniority, people aged between 50 and 70 years old) turning into an extremely attractive segment for tourism programs. From 2005 till 2008, the number of trips of this segment increased in around 7 %, with growth prospects.
Furthermore, the decline of birth rates and shifts in the traditional family model also impacts on the typical tourist profiles.
The crescent "sophistication" of the societies also diversified the purposes for inbound tourism, giving a special emphasis to the balance between leisure and business, due to international globalization.
The so called generation "Xtra-money to spend" (people between 30-40 years old) gives special relevance to experiential trips, seeking for eco-friendly products, travelling for health and well-being reasons or being avid consumers of luxury products.

1.2.2. The Lisbon case

1.2.2.1. National Context – The tourism in Portugal

According to the website of AICEP Portugal, the Portuguese Agency for Investment and External Commerce, tourism is currently Portugal´s primary export. This fact has been reinforced in the first semester of 2011, in which Portugal registered the highest number of receipts in its history, culminating with the month of June to be the best on record, reporting a 10,3% y-on-y variation, higher growth than in periods of remarkable events like the Expo 98 or the Euro 2004. During the first 6 months of 2011, foreign tourists spent 3.246 billion euros in Portugal, representing an almost 9% increase compared to the previous year.
In terms of foreign tourists nationality, the main ones contributing for this record were the Brazilian (up to 40,5% and with the biggest y-o-y increase), the Americans (with a 22,1% increase), the Belgian (showing a 15% growth) and the French (improving 14,2%). The passenger traffic at Portugal´s major airports rocketed to all-time records, targeting results of 3.2 million passengers in the month of July. Tourism represented 14% of Portugal´s service, goods and exports in 2010, these results are estimated to increase dramatically being a critical part to face the current economic recession.

1.2.2.2. Lisbon – The city of seven hills

Lisbon is known as the city of seven hills, a nickname that enriches its cultural and historical background, reviving the legend that Lisbon was originally built over seven hills.
The region of Lisbon[1] highlights the capital city of Portugal which undeniably is one of the main tourism destinations of the country. Its development potential and intrinsic tourism natural ability is enormous and Lisbon presents a high attractiveness for several segments of tourism demand, fulfilling different travel motivations.

Lisbon is a vibrant city with a wide offer of tourism accommodation, leisure and entertainment, while based upon unique territorial foundations and several expressions of history and culture (Belém Tower, Jerónimos Monastery and the historic village of Sintra are classified by UNESCO as world heritages sites).
Moreover, Lisbon is well known by its traditional character. Some important examples are the gastronomy and wine routes (around 71% of the visitors in 2009[2] experienced activities related to the enological and gastronomic heritage), and the unique fado music genre, recently recognized as world´s intangible cultural heritage by UNESCO.
In order to boost tourism promotion, each municipality of Lisbon´s region has been developing an integrated effort with the capital city to create synergies between the different tourist attractions. Hence, a significant parcel of tourists that come to the city aim at complementing their experiences with a visit to the surrounding areas of Lisbon´s region for diverse purposes (cultural touring, nautical tourism in Cascais or religious tourism in Fatima are some examples).

According to the Lisbon Tourism Association (Associação de Turismo de Lisboa - ATL), Lisbon is characterized by:

- Three micro-centralities: the historical center (typical neighborhoods including Baixa-Chiado area), the heritage area of Belém, full of history and tradition; and Parque das Nações, a renewed and modern area of the city that hosted the universal Expo 98´ nearby the Tejo river and full of nightlife and entertainment;

[1] According to the Lisbon Tourism Observatory, the region of Lisbon is composed by the metropolitan area of Lisboa and Vale do Tejo plus the territories of the West Old Regions, Ribatejo, Templários and Leiria/Fátima
[2] According to Satisfaction Survey - Inquérito de Satisfação 2009 conducted by the Lisbon Tourism Association (ATL)

- Two macro-centralities: Cascais/Estoril well known by the natural landscapes, amazing beaches and high quality of tourism and leisure infrastructures; and Sintra, a world heritage site, rich in biodiversity and landscape driven, complemented by a blend of experiences (from golf to cultural touring with some of the most beautiful palaces of the country).

Although Lisbon´s orientation for tourism, next years are going to be crucial to plan its development, being directed by strong criteria of quality and sustainability, aiming at defining a common vision and strategy to apply to the whole region and corresponding municipalities.

1.2.2.3. Lisbon Tourism Outlook

According to the Lisbon Tourism Observatory (Observatório de Turismo de Lisboa), after the underperformance registered in 2009 due to the economic recession, Lisbon tourism has been recovering, reaching 6 million of overnight stays in 2011 (from January to August), representing an increase of 28% compared to the same period in 2008. The number of guests demonstrated a 25% rise in the same period.

Foreign tourists are the ones that mostly contribute to this upsurge, signifying 64% of the total guests and 71% of the overnight stays. Adversely, the number of Portuguese guests registered a negative growth of -0,2% from 2010 to 2011. The weight of internal and external markets for the global tourism indicators has been steady since 2008, revealing the high dependency of Lisbon in foreign visitors. Overall, the total income of hotel industry rose from around 330 million € in 2009 to 371 million € in 2011 (*Table 3*).

Table 3 – Key Hotel Industry Indicators (Jan-Aug; 2008-2011)

Indicators	2008	2009	2010	2011
Guests	2.617.887	2.458.000	2.627.240	2.765.774
Overnight Stays	5.836.885	5.427.000	5.795.098	6.216.274
Total Income	382.679.111€	329.959.000€	349.735.679€	371.401.115€

Source: Lisbon Tourism Observatory, INE
Note: Data considering the cumulative Periods between January and August of each year

Spanish tourists embody around 20% of total foreign tourists that visited Lisbon during the year of 2011. Despite being the most representative, it was the only of the top-10 ranked countries by foreign tourist origin that registered a negative variation when compared to the same period of the latter year. Contrastingly, Brazilian and French tourists´ visits to Lisbon have increased in more than 20% compared to 2010 (*Table 4*).

Table 4 - Lisbon Foreign Tourists Origin (Jan-Aug, 2010 & 2011)

Markets	Nr. Tourists in 2011	Growth Rate 2010-2011
Spain	871.444	-0,7%
Germany	353.395	3%
UK & Ireland	363.556	8,9%
Italy	322.295	3,8%
France	419.634	22%
Belgium & Netherlands	273.484	11,8%
Scandinavia	238.433	10,9%
USA	241.490	5,7%
Brazil	418.526	24,1%

Source: Lisbon Tourism Observatory, INE
Note: Data considering the cumulative Periods between January and August of each year

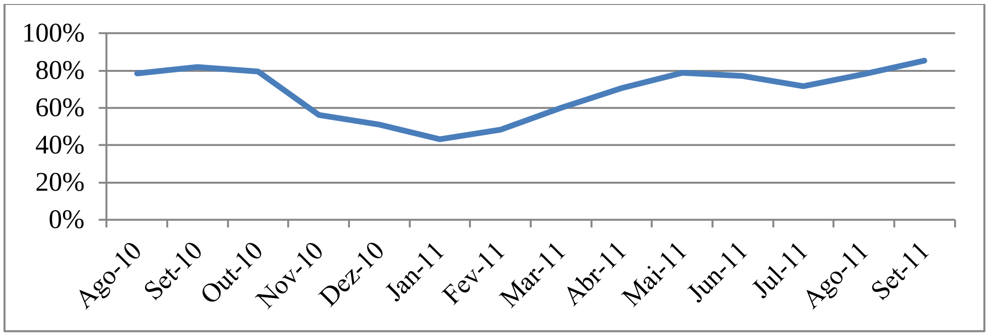
The city and region of Lisbon present similar patterns in terms of Hotel occupancy rates and average prices considering the cumulative period from January to August, and forecasting a positive growth.

The highest occupancy rates in the city of Lisbon were registered in 2008, for both city and region. The hotel average prices per room (sold and available) reached the peak in the same year.

Furthermore, this reveals a price decrease tendency since 2008 till 2011, mainly marked by the negative effect caused by the year of 2009, with lower occupancy rates and inferior average prices. More details about the occupancy rates and average prices of the hotels of the city and region of Lisbon can be found in *Table 10 (Appendixes)*.

Regarding seasonality, the hotel occupancy rates demonstrate erratic patterns, with a peak in the month of September in both 2010 and 2011 reaching 85%. Opposite to this, the first 2 months of the current year reveal occupancy rates below 50%, while the 3 summer months present an average of 75% (*Chart 2*).

Chart 2 - Occupancy Rates (%) in the City of Lisbon (Aug 2010 - Sept 2011)



Source: Lisbon Tourism Observatory, INE

The commercial traffic by air (especially motivated by the rise of low cost airline companies) and sea has been increasing since 2008, with upward patterns in terms of number of flights and cruises comparing homolog periods.

Between January and August of 2011, the Lisbon airport registered almost 10 million passengers and 94 thousand flights, meaning a positive variation of 1,50% compared to 2010.

The positive tendency is also reflected in the number of cruises arriving to Lisbon harbor, that presents a positive growth of 13,30%, significant mark as the homolog variations of previous periods have been always negative (*Table 5*). This optimistic trend is reinforced by the recognition of Lisbon as the leading Cruise Destination in Europe by the World Travel Awards in 2009.

Table 5 - Commercial traffic to Lisbon by air and sea (Jan – Aug; 2008-2011)

Indicators	2008/2009	2009/2010	2010/2011
Number of flights (Lisbon Airport)	-5,80%	4,80%	1,50%
Number of cruises (Lisbon Harbour)	-9,70%	-5,40%	13,30%

Source: Lisbon Tourism Observatory
Note: Data considering the cumulative Periods between January and August of each year

1.2.2.4. Lisbon Tourists Profile

1.2.2.4.1. Satisfaction Survey - Inquérito Grau Satisfação (2009)

The following paragraphs highlight the results of a survey conducted by the Lisbon Tourism Observatory and applied during 2009 in Lisbon with 3059 interviews made to foreign visitors in order to access their level of satisfaction with the destination.

Regarding socio-demographic considerations in the city of Lisbon, the male gender was preponderant, with 61,3% of the overall respondents, while 27,4% had between 25-34 years old and 27,2% was in the range between 45 and 54 years old (*Chart 3 - Appendixes*). 63% of the respondents were under marital status whereas 25% were single *(Chart 4 - Appendixes).*
Lisbon´s weight as the sole destination of the trip to Portugal has gone down from 69,8% in 2008 to 44,9% in 2009, while the importance of the overall region of Lisbon is considerably higher with 54,3% as unique destination chosen. Contrastingly, the city of Lisbon has increased its weight as a secondary destination, having increased from 12,8% in 2008 to 29,3% in 2009 *(Chart 5 - Appendixes).*

Additionally, 93% of the foreign tourists stayed in hotels compared to the 82% of 2007, whereas only 3,4% stayed in family or friends´ house *(Chart 6 & 7 - Appendixes).* The average overnight stay of foreign tourists in Lisbon was of around 5 nights, clearly preponderant on the overall visits to Portugal, whose average of overnight stays was of about 7 nights.

66% of the respondents revealed it was their first visit to the city while the weight of visits to the region was higher than the visits to the city in the case of those who had already been once or twice in Lisbon (*Chart 8 - Appendixes*).
2/3 of the overall visitors consider the likelihood of returning to Lisbon as a good option and 99% would recommend the city and region to friends and relatives.

1.2.2.4.2. Motivational Survey - Inquérito Motivacional (2009)

In order to access the main motivations to travel, the Lisbon Tourism Observatory developed a group of interviews comprised in the Motivational Survey of 2009 (Inquérito Motivacional de 2009) to a sample of 4.379 tourists hosted in the overall region and city of Lisbon. Interesting results were found, specially related to the difference between foreign and national tourists.

- ***Motives to visit Lisbon***

While 86% of the foreign came to Lisbon due to leisure motives, only 31% of nationals considered Lisbon for leisure and recreational purposes. Business was the number one motivation amongst the nationals (*Table 6*).

Table 6 - Motives to visit Lisbon (per origin of visitor)

Motives to visit	Portuguese	Foreign
Leisure	31,3%	85,9%
Business	47,7%	9,9%
Health	3,7%	0,2%
Visits to friends/relatives	7,5%	2,4%
Others	9,7%	2,6%

Source: Motivational Survey 2009 – Region of Lisbon (Área Promocional de Lisboa)

Some differences were found regarding the motives to visit Lisbon as city or/and as region.
Regarding short breaks, the Spanish tourists were the "champions", while the British/Irish and Dutch/Belgian prioritized the short breaks in the region compared to the city. Furthermore, the region of Lisbon has also a bigger importance for the majority of tourists in relation to touring purposes.
Among foreign tourists, the Americans presented the higher business motivation followed by the British/Irish but far away from the importance attributed to MICE (Meetings, Incentives, Conventions and Exhibitions) by the national tourists, being the most representative group (19%) in the total average of 10% of respondents that considered MICE as the main motive to visit Lisbon (*Table 7*).

Table 7 - Motives to visit Lisbon (per tourism product and tourist origin)

Markets	Short breaks		Touring		MICE	
	Region	City	Region	City	Region	City
Spain	37%	44%	22%	10%	3%	5%
Germany	32%	31%	14%	11%	4%	6%
UK/Ireland	41%	28%	12%	11%	3%	7%
France	33%	34%	30%	15%	2%	4%
Brazil	22%	22%	18%	16%	4%	4%
Italy	38%	33%	14%	7%	2%	3%
Netherlands/Belgium	41%	35%	16%	11%	2%	3%
Scandinavia	29%	27%	14%	14%	5%	6%
USA	28%	26%	13%	11%	7%	9%
Portugal	12%	8%	1%	0,4%	16%	19%
Average	25%	24%	11%	8%	8%	10%

Source: Motivational Survey 2009 – City and Region of Lisbon (Cidade e Área Promocional de Lisboa)

- ***Other important characteristics***

In the region of Lisbon, more than half of the foreign respondents were in the range between 36 and 55 years old and 14% had more than 65 years old (with a special emphasis for leisure tourism). Contrastingly, only 5% of Portuguese were on this range, revealing a higher propensity for the interval between 26 and 35 years old with 26% against 16% of foreign tourists (*Chart 9 – Appendixes*).

The big majority of foreign and national tourists were married or together, while there is an upper weight of singles in the case of business tourism. The weight of couples is significantly high in the case of UK and Ireland (81% of total respondents) and the importance of singles is relevant in the case of the Brazilian (23%) and Portuguese with 19,6% (*Chart 10 – Appendixes)*.

The Brazilian, Scandinavian and American revealed the highest average daily expenditures level of all (964€, 800€ and 750€ respectively), above the 595 € of average expenditure of the total foreign tourists (*Chart 11 – Appendixes*). The British and Irish were the ones to spend less due to the lowest impact of the transportation component, as 56,5% of them chose low cost flights, a much higher percentage than the 2nd ranked Germany with 31,8% (*Chart 12 – Appendixes*).

1.2.2.4.3. Online survey (2010): ATL´s Strategic Plan 2011-2014

In order to complement the previous studies, the Lisbon Tourism Association (ATL – Associação de Turismo de Lisboa) prepared an online survey to be applied to individuals in their country of origin in Europe. The sample distribution was different according to the relative importance of each country in terms of overnight stays in the region of Lisbon (*Chart 13 - Appendixes).* The chosen countries were: Germany, Belgium, Spain, France, Netherlands, Italy and United Kingdom. Several dimensions have been analyzed:

- ***Preferred source of information about Lisbon***

The main source of information is family and friends that visited the destination before. This is valid for all the countries considered with more than 50% of the preference, except for Germany and Netherlands in which the travel guides are the preferred mean to access information about the capital of Portugal. Internet is in the top 3 among all the nations studied, with around 30% to 40% of the preferences (*Chart 14 – Appendixes*).

- ***Motives to/not to visit the Region of Lisbon as a City Break***

The curiosity about the destination was the major motive for foreign tourists to choose Lisbon as a city break, especially for Germans (89,5%) and Dutch (76%), while the Spanish mainly travel due to the proximity to Portugal (54,1%) while the Belgian and British (37,5%) value the good weather conditions and the French give preference to the good accessibilities of Lisbon (53,8%). This information is presented in the *Appendixes* section, *Chart 15*.

- ***Motives to/not to visit the Region of Lisbon as a Business Trip***

The majority of 114 respondents on this scope chose Lisbon for business trips mainly because the company in which they work operates in the region, in exception of the Belgian and Italian that went to Lisbon mainly due to its direct flight connections.

The lack of relevant business events and conferences is pointed out by the respondents as the second major reason to not select Lisbon as a destination for business trips.

- ***Expectations: Pre-visit vs. After visit results***

The majority of the respondents revealed that the visit to Lisbon matched their previous expectations in terms of leisure destination with particular highlight to the Germans (78,9%) and Italians (74,1%). In the same item, the visit to Lisbon was overwhelming to French and Spanish, with more than half of the respondents to consider their visit results above their initial expectations (*Chart 16 – Appendixes*).

Despite the good perceptions of French and Spanish regarding leisure tourism, they are also the most skeptical regarding Lisbon as a business destination. In exception of France, Spain and Italy, the sample is not representative lower than 5 respondents in the other considered countries regarding business tourism.

- ***Target market of Lisbon***

The majority of respondents consider Lisbon to be a city targeted primarily to adult couples, with particular highlight to Germany and France (75,7% and 72,7% of the total country respondents), while the Belgian and the British consider that the secondary target market of Lisbon should be senior retired couples, whereas the other considered countries chose as 2nd main target the attractiveness of Lisbon to young couples without children (*Chart 17 – Appendixes*).

- ***Key attributes to visit Lisbon***

This indicator complements the information of the previous points, highlighting the importance of different attributes identified in Lisbon according to each nationality and reflecting the diverse cultural backgrounds among the countries considered.

For Germans and Dutch, the most important aspect for leisure tourism was the accommodation, while for Belgian, British and French was the hospitality and kindness of the Portuguese. For Spanish and Italian the most valued characteristic was its value for money character.

The Italian, French and British considered Lisbon to be a city with excellent weather conditions, whereas the Dutch, Belgian and Spanish attributed the adjective “beautiful” to Lisbon and the Germans give more importance to the culture and history of the city. Furthermore, while for German, Dutch, Belgian and British the main differentiation elements of Lisbon are related to its culture, climate is the keyword for Italian and French, whereas the Spanish feel close to Lisbon due to its geographical proximity and language.

1.2.2.5. Recent Trends in Lisbon Tourism

The National Strategic Plan for Tourism (PENT - Plano Estratégico Nacional do Turismo) elaborated in 2006 had the objective of fostering the development of tourism in Portugal and defined the tourism priorities for Lisbon for the next 10 years.

The strategic direction given by the PENT helped Lisbon to reach a status of one of the most appreciated cities in the international tourism panorama. Nowadays, Lisbon is characterized by having a diversified offer of tourism products:

- ***A top City Break***

The World Travel Awards known as the travel industry Oscars recognized Lisbon as the European Leading City Break Destination in both 2009 and 2010, being Europe´s overall leading destination in 2009.

- ***A colossus among backpackers***

According to the Lisbon Tourism Association website referencing the Portuguese Association of Hostels, the number of active hostels rose in 50% from 2008 to 2010, while the overall capacity (number of beds) increased in 90%. Budget travelers consider Lisbon hostels as the best in the world, as recognized by the largest Hostels website (www.hostelworld.com) that attributed the 2011 Hoscars Awards to three hostels in Lisbon (Travellers House, Lisbon Lounge Hostel and Living Lounge Hostel) considered as top 3 worldwide!

- ***At the heart of Golf industry***

According to the IAGTO (International Association of Golf Tour Operators), Lisbon was selected as Europe´s Golf Destination of the year 2007, having won the prize for the best golf resort in 2007 and 2009.

A survey to foreign golf players conducted in 2010 by the Lisbon Tourism Observatory revealed that 38,1% of the players came to Lisbon only with the purpose of playing golf. The majority of the respondents had already visited the Lisbon Region before and assume they will return to play golf or to other leisure purposes. The motives to visit Lisbon by Golf players can be found in the *Chart 18* of the *Appendixes* section.

- ***Rising MICE Industry***

Lisbon was recently considered as the eighth most sought after destination in the world for executives as stated by the International Congress and Convention Association (ICCA).
The international chain "*Great Hotels of the World*" goes beyond this analysis, ranking Lisbon in the top 5 world destinations to host MICE. Moreover, a survey directed by the Lisbon Tourism Observatory to congress participants in 2010 revealed that Lisbon was considered the city where the best congresses took place ahead of London, Madrid or Paris.

- ***Shopping upcoming destination***

According to the Globe Shopper City Index Europe elaborated by the Economist Intelligence Unit (EIU), Lisbon is the 7th best city for shopping behind London, Madrid, Barcelona, Paris, Rome and Berlin. This ranking is positively influenced by the "Affordability" character of the city, sustained by competitive prices. Furthermore, the "Culture & Climate" parameter had the highest consideration among the top 10 ranked cities, while the "Hotels & Transports" item diminishes the overall score mainly due to the worse accessibilities to downtown when compared to its European pairs.

1.2.3. Lisbon – Promotion and Competition

The Lisbon Tourism Association (ATL) has developed efforts to develop Lisbon brand, mostly by investing in tourism promotion in the major source markets of foreign tourists as well as by benchmarking on the destination strategies of its main competitors within a European context.

1.2.3.1. Lisbon Tourism Promotion

According to the 2010 Budget and Activity Plan of ATL comprised in the Strategic Plan for 2011-2014, around 11,5 million euros were spent in tourism promotion with a priority given to the promotion of Lisbon brand aimed at both tourist and trade targets under the slogan "Lisboa Viva" (Lively Lisbon).

Almost 2 million euros were spent in brand building through several below and above the line actions such as TV spots, online advertising or PR´s, or through the presence in trade fairs or workshops (some examples in *Figures 1 & 2* below).

Figure 1 - Periodic Publications (Follow Me Lisboa, My Own Lisbon, Touring Lisboa)

Source: Lisbon Tourism Association

Figure 2 - Bolsa de Turismo de Lisboa (International Tourism Exhibition)

Source: Lisbon Tourism Association

18% of the overall budget was spent on the enhancement of Lisbon as a city break destination, whereas 14% was destined to reinforce the capabilities of the city to become an important MICE hub.

The Spanish tourists were the preferred target for Lisbon tourism promotion (15,6% of the total), followed by the German and British (with 9,1% and 8,1% respectively). Even though, in the two latter countries, the promotion prioritizes trade purposes whereas for Spain, Brazil, Italy, Belgium and Netherlands, the emphasis is given to tourists-direct promotion (*Table 8*).

Table 8 - Promotion aim (Tourists vs. Trade) per Target Market

Markets	Tourists	Trade
Spain	68%	32%
Germany	36%	64%
UK/Ireland	38%	62%
France	47%	53%
Brazil	56%	44%
Italy	53%	47%
Netherlands/Belgium	56%	44%
Scandinavia	40%	60%
Russia/Eastern Europe	33%	67%
USA	27%	73%

Source: Lisbon Tourism Association Budget and Activity Plan 2010

A stress was given to the promotion of Lisbon brand in Germany, UK and France (with around 40-45% of the overall investment) and especially to Italy (60%), Russia and Eastern Europe (52%).

Lisbon as a city break is emphasized in Italy, Belgium, Netherlands and Scandinavia (with around 34% of the total promotion destined to the country).

A singular aspect can be identified in the promotion destined to the USA market, in which 100% of the total budget (around 150.000 euros) was intended to stimulate the meetings industry (*Table 9)*.

Table 9 - Promotion by Tourism Product and Targeted Market

Markets	Brand	City Breaks	MICE	Golf	Touring	Others	% in Total
Spain	16%	9%	12%	0%	22%	41%	16%
Germany	44%	19%	27%	11%	-	-	9%
UK/Ireland	40%	19%	14%	22%	4%	-	8%
France	41%	19%	7%	-	33%	-	6%
Brazil	9%	6%	0%	-	-	86%	5%
Italy	60%	35%	6%	-	-	-	4%
Netherlands/Belgium	21%	34%	10%	25%	9%	-	3%
Scandinavia	-	34%	1%	65%	-	-	3%
Russia/Eastern Europe	52%	25%	10%	-	13%	-	3%
USA	-	-	100%	-	-	-	2%
Others	19%	19%	12%	5%	3%	35%	42%
Total	25%	18%	14%	8%	8%	28%	100%

Source: Lisbon Tourism Association Budget and Activity Plan 2010

1.2.3.2. Lisbon Main Competitors

According to the online survey previously referred (in *1.2.2.4.3. - Online survey (2010) within ATL Plano Estratégico 2011-2014*), there is not a unanimous response about the main competitor of Lisbon perceived by foreign tourists. Hence, while the Belgian and Dutch consider Barcelona to be the sole competitor of Lisbon, the Spanish and French refer Porto to be the main competitive destination while the Italian mention London, Paris and Madrid to be equally competitors to Lisbon.

The respondents indicated also their comparative perception about destinations, with interesting results. While 40% of the German have a worse image about Lisbon when compared to its main destination competitors, around 75% of the French and 70% of the British consider Lisbon to be as or more competitive than its principal rivals (*Chart 19 – Appendixes*).

Going beyond this analysis and in order to match the perceived image with destination strategies to promote tourism, ATL recurred to certain benchmarking metrics identified in the strategic plans for tourism development of the key European competitors of Lisbon. Those are referred under the Strategic Plan 2011-2014 analysis by Deloitte:

- ***Amsterdam***

Amsterdam bets on the values of creativity, innovation and entrepreneurship with the following slogan "The Amsterdam Metropolitan Area is creative, contemporary (European Metropolis) on the water", aiming at creating an integrated image of the city and region of Amsterdam, focusing on sustainability and originality. IAmsterdam is the Amsterdam brand motto.

- ***Barcelona***

Barcelona´s positioning is focused on a reinforcement of the national identity of the city without letting go its international profile. Barcelona wants to be seen as an economic hub, with a diversified and heterogeneous offer.

- ***Madrid***

Madrid aims at improving its positioning increasing the number of visitors, expenditures level and average overnight stays of tourists, betting on the cultural background of the city, as well as on the boost of the meetings industry.

- ***Berlin***

The German capital wants to be recognized as "the visit card" of the overall country, the driver of Germany in terms of tourism vision. Furthermore, the slogan "Berlin is trendsetter – Dynamics of modernity reflected in history" attributes a timeless character to the city.

1.2.4. Lisbon´s Tourism – The future

Envisioning it´s future, the tourism of Lisbon has developed an action plan with a set of structuring projects to help the city to accomplish its future objectives. Those projects are aimed at developing infrastructures to support tourism and improving transportation networks with the creation of a TGV between Lisbon and Madrid, a new terminal for cruises in Sta. Apolónia and through significant investments in Lisbon Airport.

Additionally, the city has to accompany the crescent needs of tourists and key tourism trends, reinforcing its competitiveness within an international context and consisting into a strong alternative to its major European competitors. This tendency is expected to be maintained as Lisbon is considered to be the 2^{nd} top destination to visit in the world (only after Reykjavik) in 2012 according to Lonely Planet, a worldwide well-known travel guide.

It is indisputable that Lisbon has risen as a tourist destination over the last years, but how far can this city go?

1.3. Case Study Questions

1. Develop a qualified SWOT analysis for Lisbon.
2. Elaborate an adequate segmentation and targeting for Lisbon, considering current tourist expectations and trends.
3. Define the unique value proposition of Lisbon brand and key drivers of its positioning.
4. In what extent do foreign tourists perceived image and behaviors about Lisbon´s main tourism “products” match with its desired positioning and promotion actions?
5. Define a VMO (Vision, Mission and Objectives) strategy for Lisbon. Refer at least 5 strategic objectives.
6. Which key marketing and strategic actions would you take to enhance the tourism in Lisbon? Relate them to the strategic objectives you described in the previous answer.
7. Which markets should Lisbon prioritize in terms of both strategy and promotion? What should be the product strategy to apply for the most representative market? Recur to a strategic analytical framework to answer this question.
8. According to your own image and information presented in the case, how does Lisbon´s positioning differentiates itself from its main competitors?

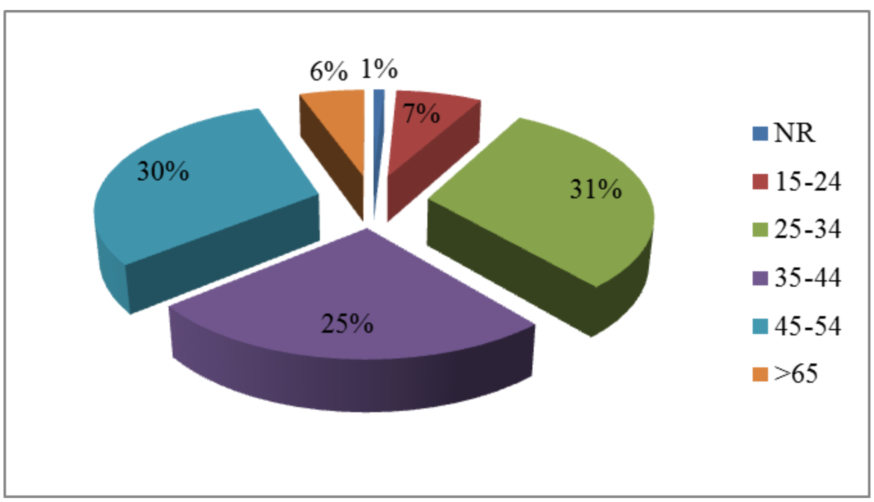
1.4. Appendixes

Table 10 – Occupancy Rates (%) and Average Prices (€) of Lisbon Hotels: City and Region (Jan-Aug, 2008-2011)

Indicators	2008	2009	2010	2011
City of Lisbon				
Occupancy Rates	67,2%	58,9%	64,7%	66,1%
Average Price per Sold Room	81,13	72,45	71,66	73,79
Average Price per Available Room (RevPar)	54,55	42,65	46,38	48,84
Region of Lisbon				
Occupancy Rates	63,1%	55,7%	59,4%	60,2%
Average Price per Sold Room	78,67	71,73	70,30	72,29
Average Price per Available Room (RevPar)	49,66	39,96	41,74	43,52

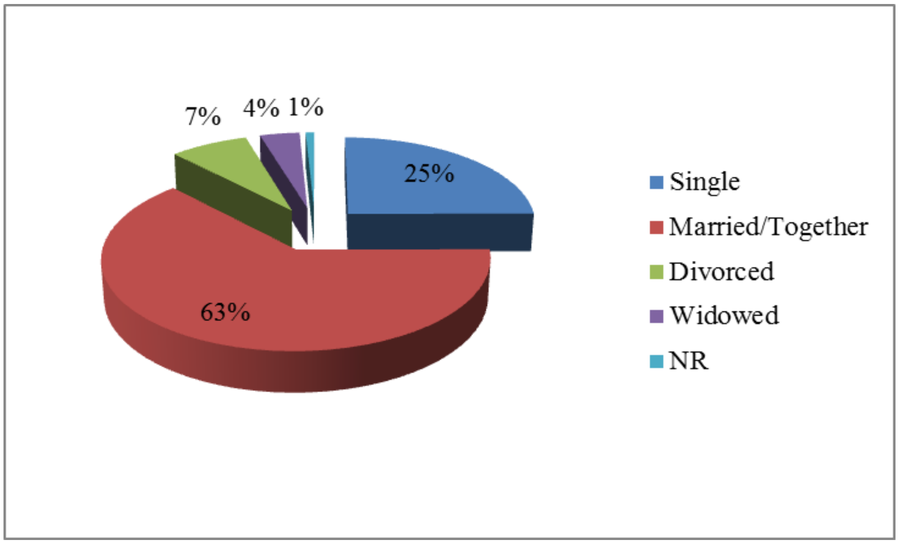
Source: Lisbon Tourism Observatory, INE
Note: Data considering the cumulative Periods between January and August of each year

Chart 3 - Age Groups of Foreign Tourists: City of Lisbon (% of respondents)



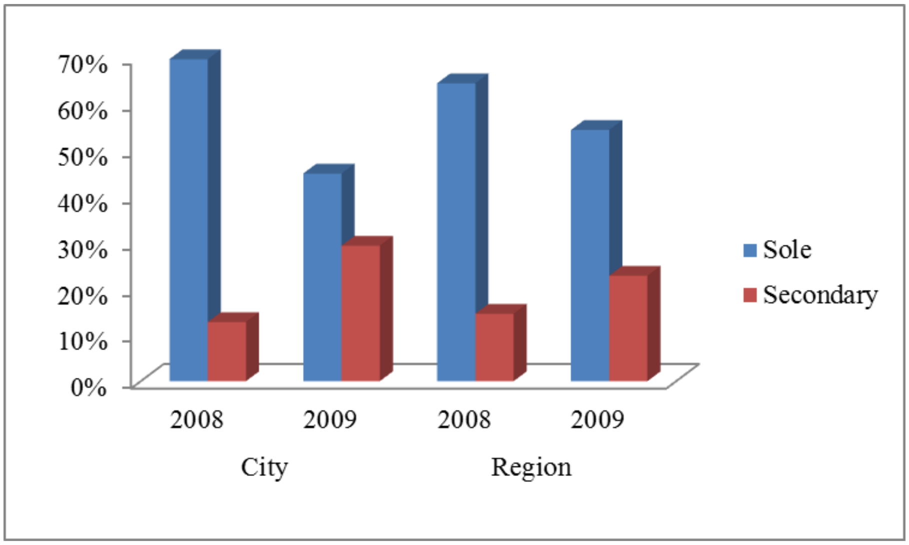
Source: Satisfaction Survey 2009

Chart 4 - Marital Status of Foreign Tourists: City of Lisbon (% of respondents)



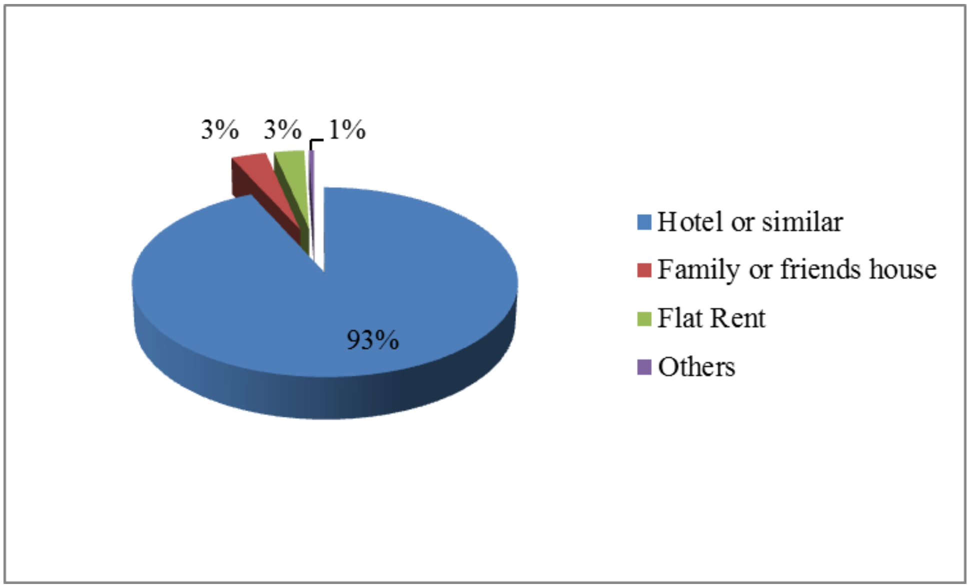
Source: Satisfaction Survey 2009

Chart 5 - Lisbon as Sole or Secondary Destination: City and Region (% of respondents)



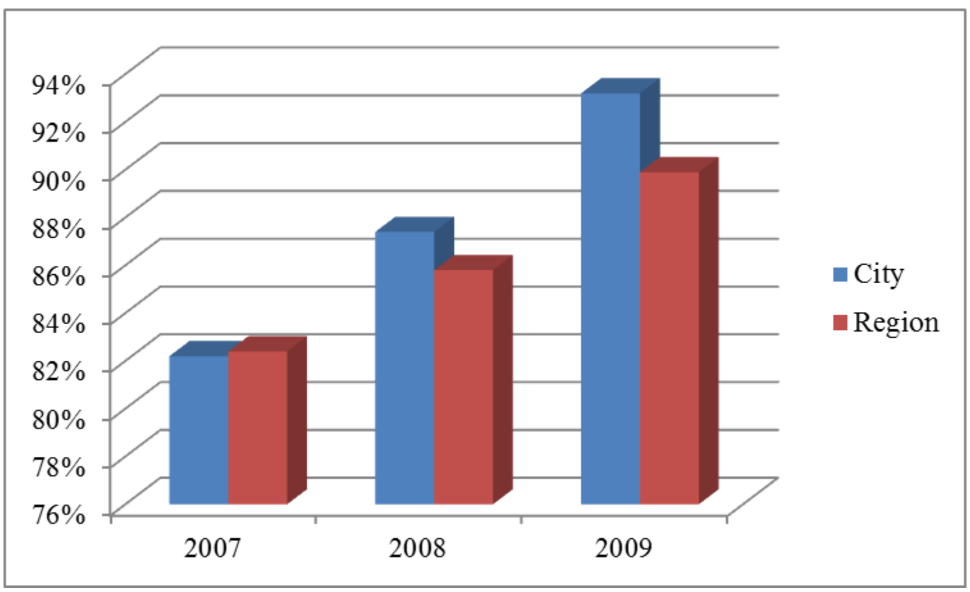
Source: Satisfaction Survey 2009

Chart 6 - Foreign Tourists Accommodation: City of Lisbon (% of respondents)



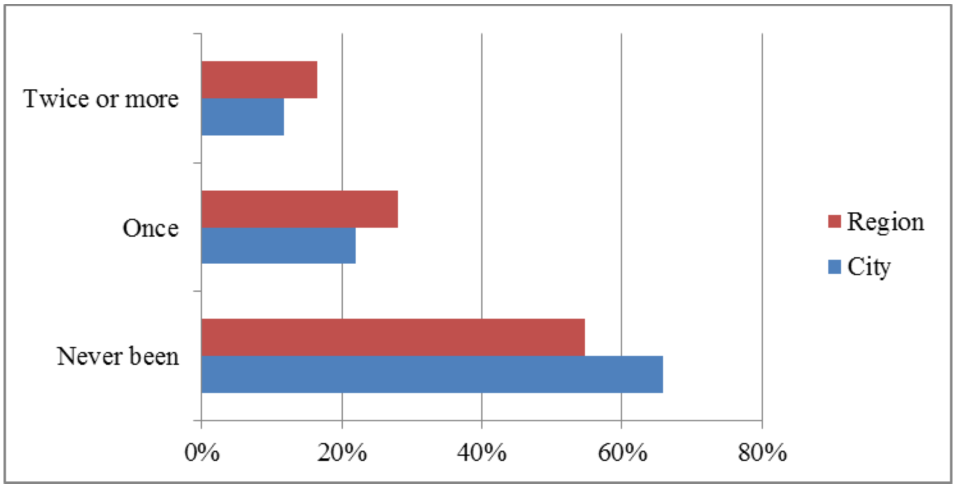
Source: Satisfaction Survey 2009

Chart 7 – Foreign Tourists Overnight Stays in Lisbon´s Hotels: City and Region (% of respondents)



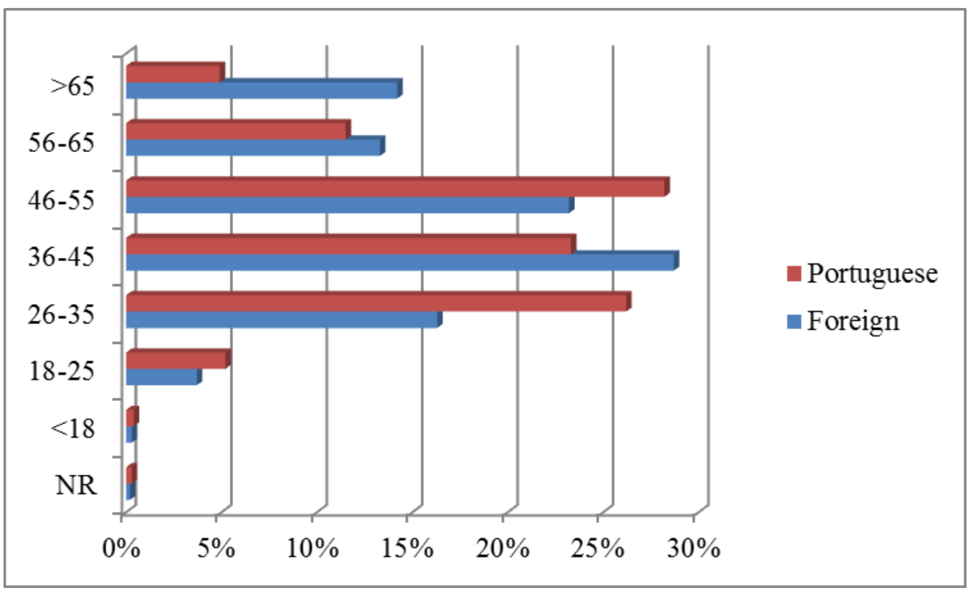
Source: Satisfaction Survey 2009

Chart 8 - Patterns of visit to Lisbon: City and Region (% of respondents)



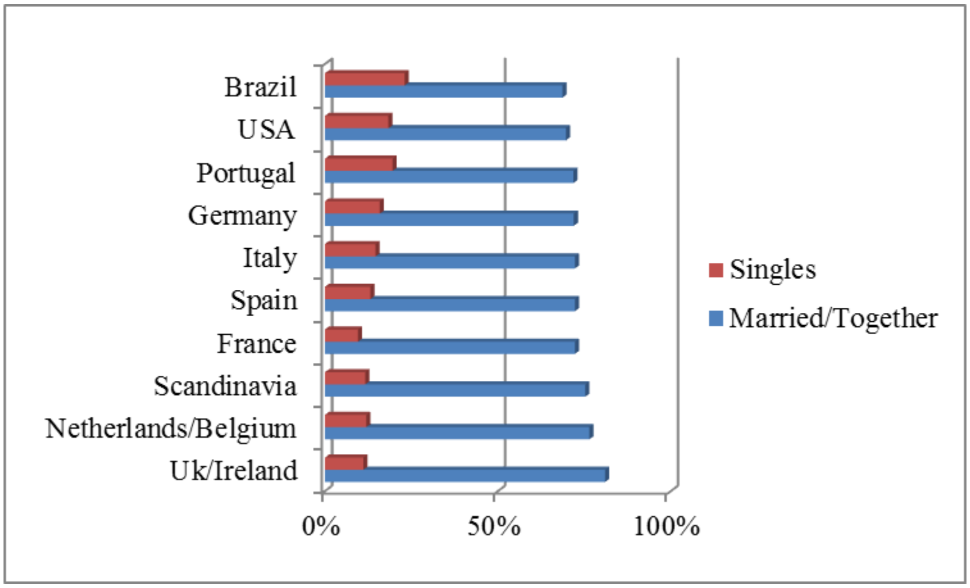
Source: Satisfaction Survey 2009

Chart 9 - Age Group by Portuguese or Foreign Tourists (% of respondents)



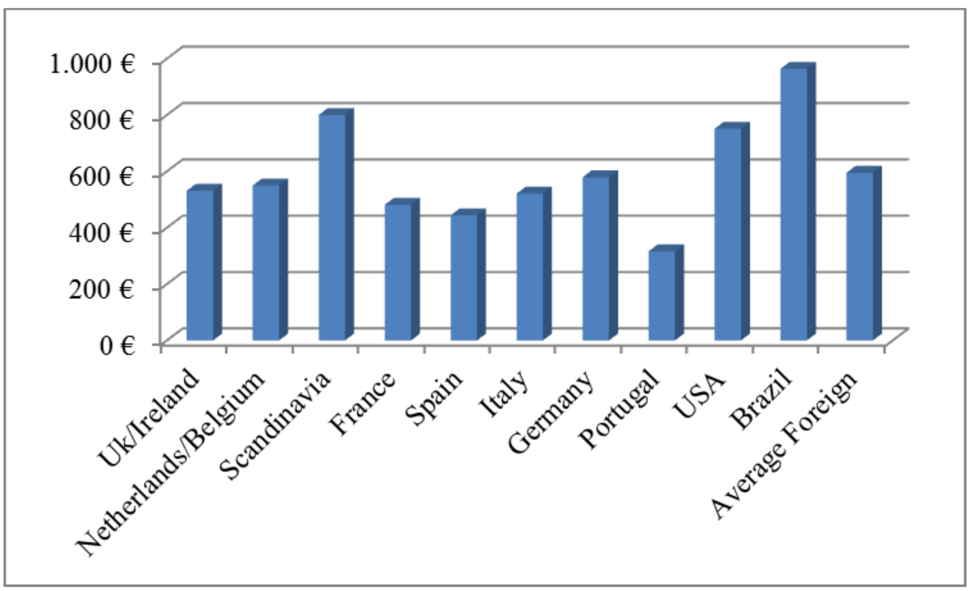
Source: Motivational Survey 2009 – Region of Lisbon (Área Promocional de Lisboa)

Chart 10 - Marital Status by Portuguese or Foreign Tourists (% of respondents)



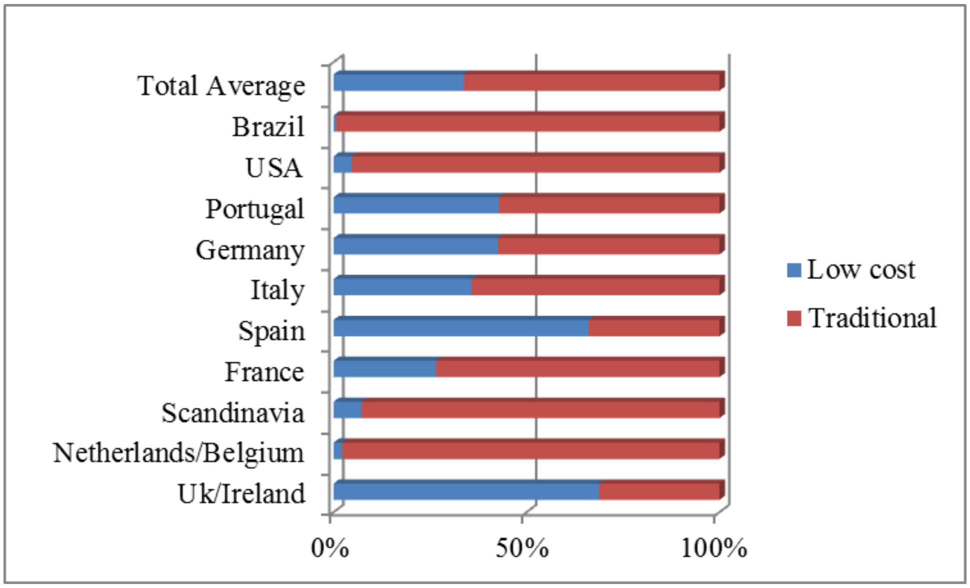
Source: Motivational Survey 2009 – Region of Lisbon (Área Promocional de Lisboa)

Chart 11 - Average Daily Expenditure (€) per Tourist Origin



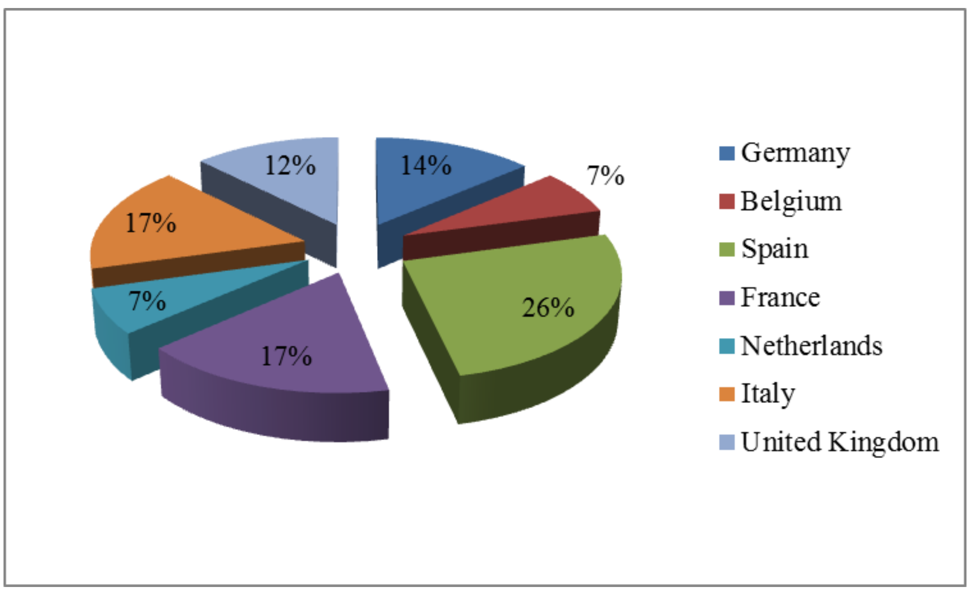
Source: Motivational Survey 2009 – Region of Lisbon (Área Promocional de Lisboa)

Chart 12 - Type of Airline Company used to fly to Lisbon (per Tourist Origin, % of respondents)



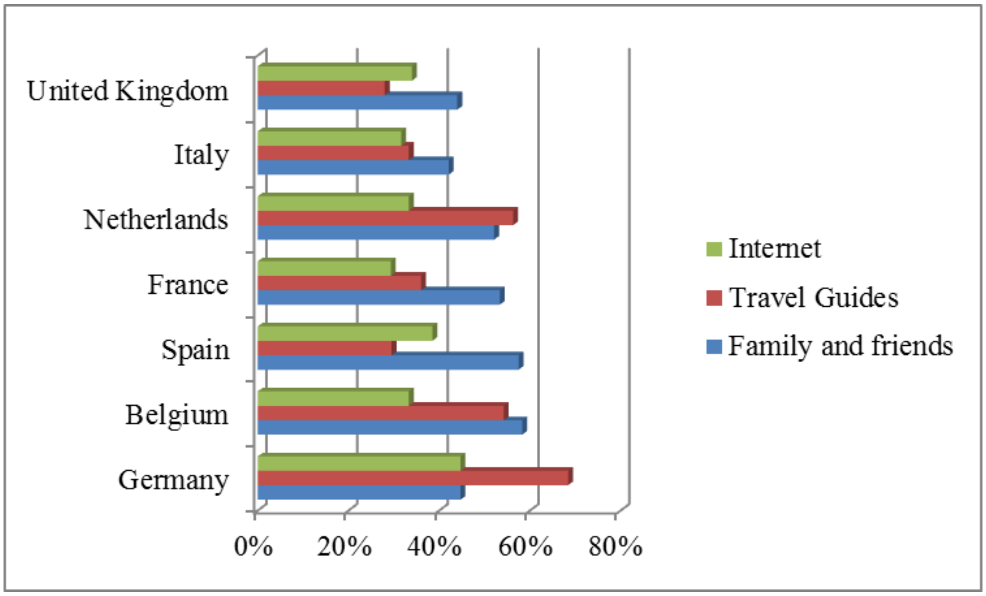
Source: Motivational Survey 2009 – Region of Lisbon (Area Promocional de Lisboa)

Chart 13 - Sample Distribution per Country (% of respondents)



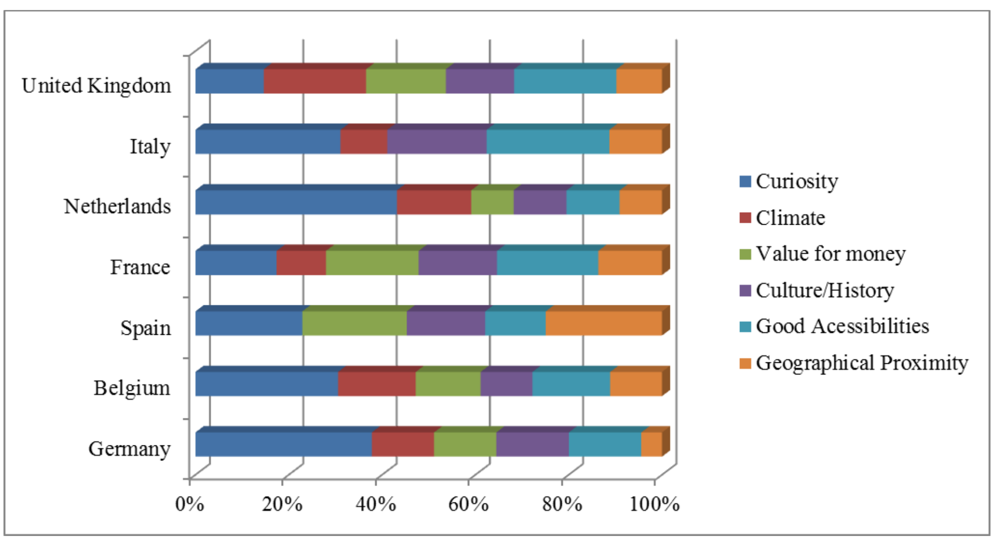
Source: Lisbon Tourism Association Strategic Plan 2011-2014 by Deloitte

Chart 14 - Source of information to visit Lisbon (per Tourist Origin, % of respondents)



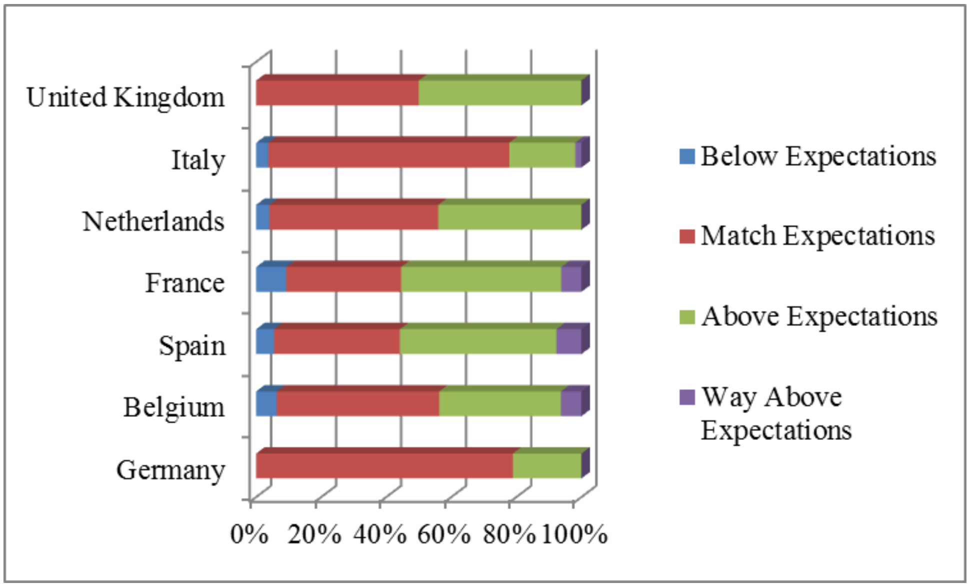
Source: Lisbon Tourism Association Strategic Plan 2011-2014 by Deloitte

Chart 15 - Motives to visit Lisbon as a city break (per Tourist Origin, % of respondents)



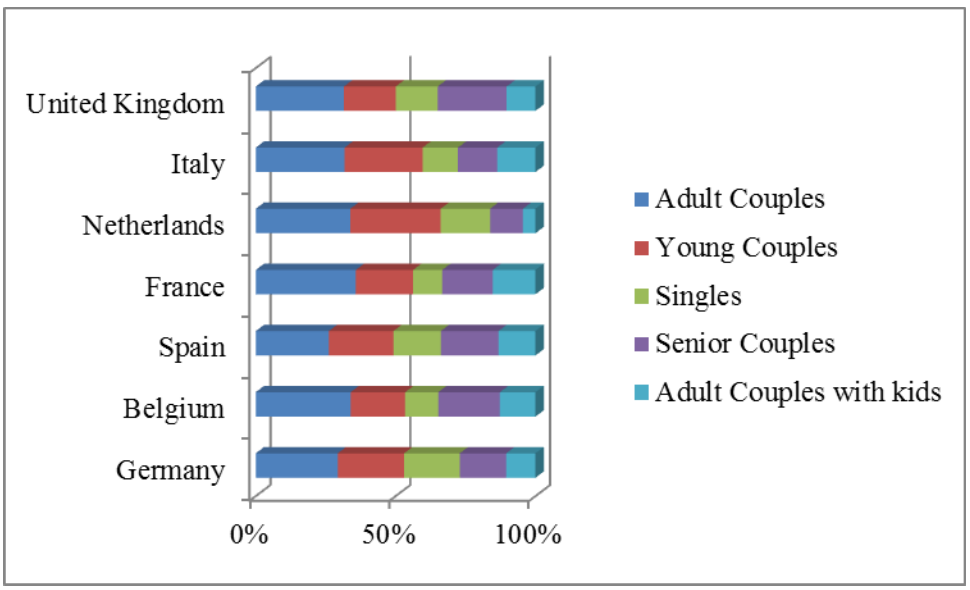
Source: Lisbon Tourism Association Strategic Plan 2011-2014 by Deloitte

Chart 16 - Expectations Level regarding Lisbon´s leisure (per Tourist Origin, % of respondents)



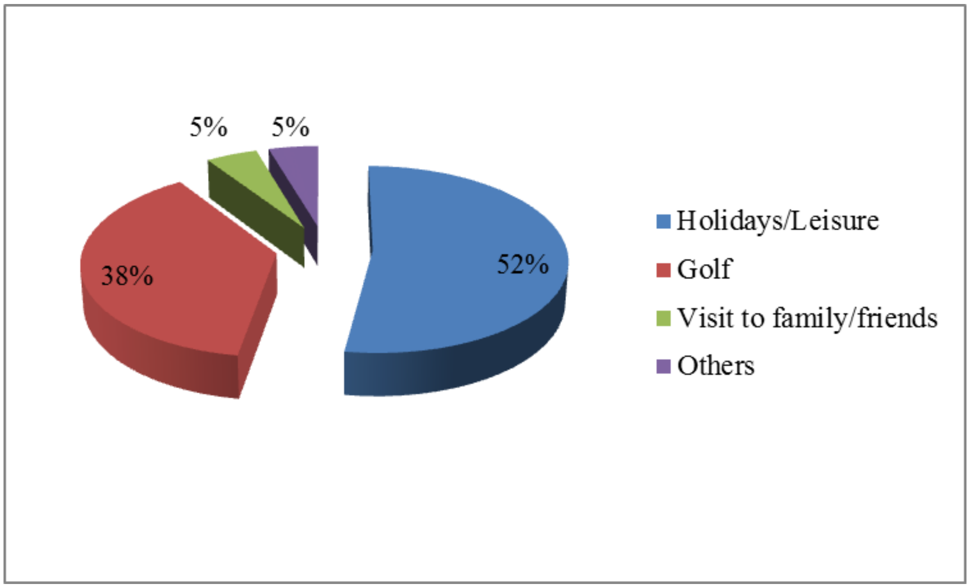
Source: Lisbon Tourism Association Strategic Plan 2011-2014 by Deloitte

Chart 17 - Perceived Lisbon´s Target Groups by foreign tourists (% of respondents)



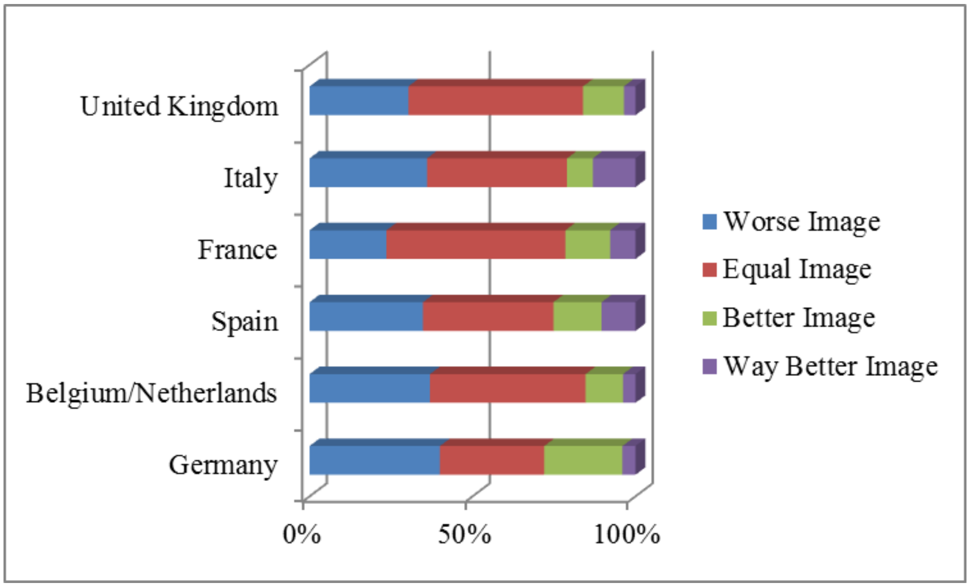
Source: Lisbon Tourism Association Strategic Plan 2011-2014 by Deloitte

Chart 18 - Motives to visit Lisbon by Golf Players (% of respondents)



Source: Lisbon Tourism Association Strategic Plan 2011-2014 by Deloitte

Chart 19 - Foreign tourists Perceived Image of Lisbon relative to main competitor (% of respondents)



Source: Lisbon Tourism Association Strategic Plan 2011-2014 by Deloitte

2. TEACHING NOTES

2.1. Case Study Target

The formulated case study is destined to Master students in the areas of Hospitality and Tourism, aiming at developing the main concepts of Marketing, Strategy and Branding applied to destination image and positioning.

This case study is inserted in a problem solving context focused on the competitiveness of a destination.

2.2. Educational Objectives

This case study was developed with the following educational objectives:

- To recognize the importance of tourism for the overall world economy, considering the key challenges of national and international tourism;
- To learn how to apply business management concepts in a destination context, training the necessary competences to act as destination managers in the future;
- To instill a holistic mindset towards a destination strategic approach;
- To use a set of strategic analytical frameworks contributing for destination market analysis, branding, segmentation, target and positioning;
- To interrelate important concepts in destination management such as branding, promotion, image and tourist behaviors;
- To foment analytical skills and creativity while developing and implementing a destination strategy;
- To generate critical and structured approaches towards the resolution of the problems proposed;
- To stimulate the practical involvement of the students in events related to the destination topic;
- To innovate with the presentation of a hot topic quite recent and short in terms of published research.

2.3.Literature Review

2.3.1. Destination Branding

"A brand is what differentiates you and makes you special" (Milligan, 1995: 39). This is valid, not only for commercial and industrial brands but also for destinations, being the development of an effective brand a strong challenge.

Destination branding encounters a parallel on the branding of consumer products as destinations are also identified through specific symbols, slogans, colors, logos, heritage, myths or legends (Cai, 2002; Williams et al, 2004; Morgan et al, 2002). Moreover, one of the key differences resides in the intangibility character of a place compared to the intrinsic tangibility of a product. According to Keller (1998), a destination brand identity reflects the contribution of all brand elements to awareness and image. Hence, one of the biggest risks of a destination as a brand is the generalization of its identity due to its complex nature (Florek, 2005).

Morgan et al (2002) refer that strong destination brands have a rich emotional significance, great conversation value and provide high anticipation for their potential tourists. The objective of a destination branding is to communicate and prove its unique identity by differentiating itself from its competitors (Morrison & Anderson, 2002). In fact, all branding aims at giving to a product a specific and more distinctive identity (Cova, 1996) and that is, in essence, what most city/country marketing seeks to do for cities/countries.

The link between branding and tourism through destination branding is related to the expectations of a travel experience that is uniquely associated with the particular destination (Blain et al., 2005; Pike, 2009). Some authors like Kotler et al (2003) consider that branding in tourism is linked to the relationship between the consumers and the products/services with which they interact; while others argue that branding is "the most powerful marketing weapon available to contemporary destination marketers" (Morgan et al, 2002: 335), considering that the strength of the brand is critical for the success of the destination in the growing competitive environment we currently experience.

According to Buhalis (2000), for this objective to be accomplished, a destination marketer should take into account the role of the destination stakeholders in the brand development process, a clear alignment with the values of the destination and a focus on future strategic orientations and on its key target markets because some aspects of a destination may be effective to one segment but ineffective to another (Fan, 2006).

The development of a destination branding strategy is critical to drive brand associations between the destination and the consumers, helping them to find points of difference compared to its competitors (Keller, 2008). Furthermore, those points of difference help the consumers to positively evaluate the destination brands and generate a higher destination brand loyalty. It is also important to refer that this latter concept translates into the ability of a destination to provide visitors with an experience that corresponds to their needs, matching with the image that they hold of the destination itself (Joppe & Waalen, 2001).

2.3.2. Cooperative Destination Branding

The term known as cooperative destination branding was presented by Cai (2002) and refers to a brand name that joins two or more communities with complementary natural and cultural attractions whose branding strategy should be aligned based on the assertion that the "geographical heterogeneity may limit building a particular brand for a destination or a country" (Tasci & Kozak, 2006: 303).

This concept aims at demonstrating the potential benefits of an effective brand element mix, creating a notion of synergy by the usage of common tourism resources in order to generate a stronger destination identity and image across multiple communities bigger than the impact provided by a singular community itself. Hence, shared destination attributes may converge into an overall improved destination image based on a multiplicity of brand associations subject to reinforce the brand identity of the region as a whole.

2.3.3. Destination Branding vs. Destination Image

Brand image is defined as the way brand´s personality is perceived in consumer´s minds. In a destination context, there is a link between the destination marketer that promotes its brand, while the consumers (in the case, the tourists), perceive an image of that destination.

Even though, for some authors, the concepts of brand and image are interrelated (Pritchard & Morgan, 2001), while for others, branding is created through image (Cai, 2002; Jensen & Korneluissen, 2002; Ravinder, 2003; Govers, 2003).

The latter argue that destination image formation is the first step towards destination branding, in which there is a change from a set of brand associations held in tourists´ memory towards a sustainable link with the brand itself. Furthermore, this adjective establishes one of the biggest differences between both concepts, as a destination brand tends to be more sustainable than destination image (Kozak, 2003).

The concept of image is a key building block for the development of a destination positioning that will reflect a certain brand identity. Moreover, the sum of beliefs, ideas, impressions (Crompton, 1979) and tourism experience-related attributes (Millman & Pizam, 1995) direct the image that tourists will form about a certain destination.

According to Hunt (1975), the power of image is as strong as capable to influence on the destination selection process and presenting a key role on traveler behavior and satisfaction.

A major challenge for DMO´s (Destination Marketing Organizations) is to reinforce positive images held by target audiences, change potential negative images or generate the necessary measures towards the creation of new images.

2.3.4. Dimensions of Image

According to Ryan & Gu (2008), the image that tourists form about a certain destination is the starting point for their expectations about that destination. Therefore, the overall image of a destination is influenced by different factors, which are described as cognitive, affective and unique dimensions of image.

While cognitive evaluations represent a set of beliefs and knowledge about the destination, the affective dimension is related to feelings expressed about a certain destination.

The separate assessment of cognitive and affective variables is necessary to evaluate their unique effect on tourists' attitudes and potential behaviors (Baloglu and Brinberg, 1997); Russel, 1980; Russel and Pratt, 1980; Russel and Snodgrass, 1987; Russel et al., 1981).

The overall image of a destination should be analyzed under three attributes: holistic, functional-psychological and uniqueness. This last component is particularly highlighted (Echtner & Ritchie, 1993). The unique character is the objective of an effective destination positioning being able to be considered as different in the minds of the prospects.

In order to achieve this goal, the DMO´s heavily bet on tourism promotion in order to enhance their value propositions and differentiation abilities compared to their main competitors. Those marketing and promotional actions are subject to create another image level on tourist minds, called by induced images, according to Gunn (1988). In opposition to this induced type, another kind of destination image can be created and based on first-hand experience, with a much highly personal character and termed as organic image.

2.3.5. Consumer Behavior in Tourism

It has been argued that the image of a destination is crucial not only to the destination selection process but is also an important driver of tourist behaviors. Hence, the motivations to visit, the intentions to revisit a particular destination and the ability to spread a positive word-of-mouth about it have been important behavioral consequences of destination image.

The motivations to visit a destination are generally framed into two different concepts: pull and push factors. Baloglu & Uysal (1996) defined the pull factors into certain destination attributes like the novelty or the image (that tourists have and the image marketed by the DMO´s) subject to impact on the motivation of an individual to travel while push factors are internal forces that are intangible and mostly socio-psychological as defined by Crompton (1979) in which the tourists are attracted by a certain destination regarding its capability to correspond to certain inner needs and motivations, such as the desire of relaxation and escape, adventure or adrenaline.

From a DMO perspective, the most successful tourism products are the ones that best match the diverse needs of a given market segment, enforcing an alignment between internal and external motivations. This can contribute to the enhancement of tourism destination management, driving potential satisfaction reasons for travelers and generating an improved destination loyalty. Both satisfaction and loyalty concepts should be also an outcome of the interaction between the two sides of the tourism system, the tourist and the tourism attraction (Jurowski *et al.*, 1996). Furthermore, these motives interact in a dynamic and changing environment (Correia, 2000) in which there is an exchange of perceptions between the destination marketers and the individual tourists fundamental to assess not only actual tourist attitudes but also to predict future travel patterns.

The intention to revisit has been widely studied in past tourism literature due to its indication of customer loyalty, as customer acquisition is generally more difficult and expensive than retaining existing customers.

According to Fishbein and Ajzen (1975), positive past experiences can lead to a more positive belief that will create a more optimistic attitude about a particular destination. Those experiences and beliefs converge into the common concept of image, which is considered by Bigne et al. (2001) as one of the key factors to drive the intention to revisit a destination. Moreover, the image that tourists have of a certain destination will impact on their future behavior, highlighting a certain level of loyalty and affinity towards a specific destination.

Thus, attempts to improve the image of a destination by the destination marketers will ease loyal visitors to revisit or to recommend that destination to others, contributing for an overall destination promotion and development.

In another sense, tourism industry´s intangible character impacts on potential purchasing and experiential considerations. A positive perception of a tourist about a certain destination is more likely to be communicated to other tourists, generating a positive word-of-mouth (WOM) effect. According to Murray (1991), a positive WOM is a source of risk reduction and feedback chances and it has a significant importance on travelers' destination selection phases (Mansfeld, 1992).

Recently, new forms of interpersonal influence through WOM have accelerated with the advent of Internet, giving birth to the acronym eWOM (Electronic Word-of-Mouth). Nowadays, the use of various electronic technologies such as online discussion forums, travel blogs, review sites like Trip Advisor and social networking sites like Facebook ramp up the information exchange among communicators all over the world (Goldsmith, 2006).

This phenomenon has originated the creation of a “web-based destination marketing system” used by the Destination Marketing Organizations (DMO´s) as a strong distribution channel and promotional instrument (Anckar and Walden, 2001; Yuan et al., 2003; Wang and Fesenmaier, 2006). Hence, an overall positive WOM is an important target for the destination marketers to accomplish reinforcing destination branding and positioning in an encouraging way.

2.4. Analytical Frameworks Presentation

The case analysis drills down an approach based upon quantitative and qualitative variables, supported by key strategic and marketing tools.

The fundamental quantitative analysis respects to a collection of secondary data in order to:

- Understand the main international and national trends and fundamental tourism patterns in the specific region and city of Lisbon
- Access essential tourist behaviors and attitudes to contribute to segmentation, target and positioning outcomes
- Highlight key directions of the promotion of Lisbon Tourism regarding targeted markets and purpose of promotion (commercial or business-oriented)

The qualitative analysis aims at complementing the information provided by the quantitative variables, namely about particular and unique trends of Lisbon as a tourist destination. This type of analysis was referred on the aegis between history and future of Lisbon, giving special emphasis to international awards and recognitions given to the destination as well as on positioning features compared to its key competitors.

Additionally, certain strategic and marketing tools are suggested to be used in order to align the qualitative and quantitative information, contributing for the overall comprehension and analysis of the case study applied to a destination. Some of the proposed are related to:

- **VMO strategy:** The definition of a VMO (Vision, Mission and Objectives) covers the key strategic drivers of the destination. Hence, it starts with the visionary purpose or future driver, to then establish realistic targets with a proposed mission to be attained with a set of strategic objectives (that can be framed into short, medium and long-term objectives);

- **Qualified SWOT:** Presentation of the key strengths, weaknesses, opportunities and threats that Lisbon faces as a destination, with a reference to the degree of impact of each topic on the tourist destination, in addition to the likelihood of occurrence of certain exogenous variables and prospected trend of the positive and negative intrinsic aspects of the destination;

- **STP (Segmentation, Target and Positioning):** Key tool to define a strategy, reflecting the main criteria that will outline the customer groups to attack, their fundamental profiling characteristics and the consistency with a desired positioning that reproduces the way the destination wants to be seen in the market and that differentiates itself from its competitors (generally reflected in the Positioning Map);

- **Mutually Reinforcing Activities:** Commonly used to describe the integration of activities that contribute to the success of a company´s strategy, will be customized in this case to show the overall positioning picture of Lisbon as a destination through the alignment of its brand values;

- **Strategic Groups:** Usually referred as a framework to analyze the competitive environment of a company, with the grouping of organizations with similar strategic characteristics. In this case study, this framework will be seen within a strategic target market groups perspective;

- **Marketing Mix Principles:** Despite the clear distinction between the typical marketing mix for a product/service and the marketing mix for a destination, its key principles can be applied to the Lisbon case patent for example in the case of the elements of product, brand and communication.

2.5. Action Plan

Session	Objectives	Means for Action Plan	Time
Session 1	Raise interest about the case	Initial discussion about destinations, exchanging travel experiences between lecturer and students	15 min
	Present the issue in a dynamic and interesting way	Presentation and discussion around some destination promotional videos and magazines	30 min
	Provide a structured overview of the case study	Distribution of the case study to the students and big picture given by the lecturer with a summary on the topic (only the case is provided, not the questions)	15 min
	Get a first glance on audience perceptions about the topic	In-class discussion about Lisbon´s image for the students (**In-Class Question 1.)**	25 min
	Demand students to go beyond the case study orientations	Presentation of two questions to be prepared as individual homework (**Homework Questions 2 & 3**)	5 min
Out of Session	Generate common group understanding about main aspects covered	Group component: Case study reading and comprehension	60 min
	Enlarge the knowledge about destination management, train analytical and creativity skills	Individual component: Complement the information contained in the case study with a research in books, scientific articles and electronic resources	60 min
Session 2	Converge students personal opinion with research work developed	Resolution proposal for Homework questions	20 min
	Stimulate exchange of arguments about overall background themes: tourism, tourist behaviors and competitiveness in tourism	In-class discussion around current international and national tourism trends (**In class Question 4.)**	20 min
		In-class discussion about tourist behaviors that drive Lisbon tourists´ profile (**In-class Question 5.)**	20 min
		Promote dialogue about compared destination positioning (Lisbon vs. Other European capitals)	20 min
	Brief students about case study expectations	Distribution of case study questions	10 min
Out of Session	Elaboration of slides presentation and word document (maximum 5 pages)	Case study analysis and linkage to questions	120 min
		Benchmarking on analytical frameworks to be used	60 min
		Complementary research to be made to case study resolution	60 min
Session 3 & 4	Case resolution by the students	Draw the order of presentation	5 min
		Delivery of documents and group presentation to the class	15 min/ Group

	Promote learning through discussion about the presentations	Promote a structured debate around each presentation and application of **In-Class Questions 6. , 7. and 8.**	10 min/ Group
	Showing to students that the topic goes beyond the case - one extra-effort demanded	Presentation of one question to be prepared as individual homework (**Homework - Question 9.)**	5 min
Out of Session	Instill the holistic mindset approach necessary to evaluate destinations	Benchmarking and research towards the homework question resolution	30 min
	Presentation and written document assessment by lecturer	Rank presentations by applying metrics (positive and negative points) for non-verbal communication, verbal communication and content of the presentation	120 min
	Stimulate involvement of students around the destination topic	Stimulate students to participate in the organization of an IBS conference to promote Lisbon´s tourism with the topic "I believe in Lisbon"	

2.6. Action Plan Questions

1. How would you characterize the image of Lisbon on your mind? (In-class resolution - Session 1)

2. Elaborate a PEST Analysis for Lisbon, highlighting the main incontrollable macro-environment aspects subject to impact on its strategy (Homework resolution – Out of Session)

3. In your view, what are the critical success factors for a destination? (Homework resolution – Out of Session)

4. How do recent trends in Lisbon tourism match with upcoming international tourism trends? (In-class resolution – Session 2)

5. How would you promote Lisbon to Portuguese tourists? (In-class resolution – Session 2)

6. Which other tourism products can be boosted by Lisbon and are not referred in the case? (In-class resolution – Sessions 3 & 4)

7. What is your perception about the segmentation, target and positioning proposed? (In-class resolution – Sessions 3 & 4)

8. Do you agree with the proposed strategic market orientations proposed by the case? (In-class resolution – Sessions 3 & 4)

9. Refer the importance of the integration between the region and city of Lisbon for the future tourism promotion of the capital of Portugal. (Homework resolution – Out of Session)

2.7. Case Study Resolution Proposal

1. **Develop a qualified SWOT analysis for Lisbon.**

	Impact in Tourist Destination			Likelihood of Occurrence		
	High	Medium	Low	High	Medium	Low
Opportunities						
International tourism growth (1 billion tourist arrivals expected in 2012)	X			X		
Latin America forecasted world´s highest growth in outbound visits may boost Brazilian visits to Portugal	X			X		
Strong increase of Brazilian visitors in Portugal and in Lisbon	X			X		
Tourists coming from emerging economies may be an important source to diversify usual tourist source (European countries)		X			X	
Potential opened by new and niche market segments due to socio-demographic changes	X			X		
Portugal´s recent tourism results in a good shape	X			X		
Leveraging tourism as a way out for the current economic crisis		X		X		
Lisbon´s tourism good prospects in terms of overnight stays, number of guests and hotel occupancy rates	X				X	
Recent increasing tourists expenditures level reveals a higher potential for increasing future tourism revenues		X			X	
Typical secondary targets with high average daily expenditures (American and Scandinavian)	X				X	
Upward patterns of commercial traffic by air and sea	X			X		
Rising low cost flights to Lisbon (almost 60% of UK/Irish come in low cost flights)		X		X		
Couples orientation due to general profile of Western Europe tourists	X				X	
Significant infrastructural developments planned to boost tourism	X				X	
Threats						
Europe´s prospected declining share in world tourism	X			X		
Asia is the fastest growing area in terms of inbound arrivals	X			X		
Internal market for tourism with downward trend (negative growth between 2010 and 2011)	X			X		
Lisbon´s dependency on European tourists may be affected due to the economic recession			X	X		
Spanish tourists represent 20% of total tourists and present a negative variation	X				X	
Eastern European markets growth for tourism (higher growth than EU15, the typical tourists of Lisbon)	X					X
Seasonality of hotel occupancy rates (Jan-Feb with occupancy rates below 50%)	X				X	

	Impact in Tourist Destination			Prospected Trend		
	High	Medium	Low	Increase	Maintain	Decrease
Strengths						
Integrated effort of tourism promotion between Lisbon´s region and city	X				X	
Synergies among unique experiences taken from the overall regional tourism products	X			X		
High attractiveness potential for several and diverse tourism segments	X			X		
Heritage and historical background	X				X	
Traditional and authentic products (gastronomy, wines, fado, Fatima)	X				X	
International recognition for diverse purposes (leading city break and cruise destination, golf paradise…)	X				X	
Lisbon´s preponderance in Portuguese tourism panorama (5 out of average 7 nights in Portugal are spent in Lisbon)	X				X	
Growth of the city of Lisbon as secondary destination gives a new meaning to the integrated city-region approach		X			X	
Patent intention for recommendation of foreign visitors driving positive WOM expected		X		X		
Hospitality and kindness of the Portuguese highly valued		X			X	
Good weather conditions, the sunniest capital of Europe and beautiful city considered by tourists	X				X	
Lisbon as a colossus among backpackers with the best hostels in the world	X			X		
Competitive prices compared to European rivals	X				X	
Confidence in the future (2nd best destination next year by Lonely Planet)		X			X	
Weaknesses						
Low emphasis given by foreign tourists to business motives to visit Lisbon (only 10%)	X				X	
City Touring less relevancy compared to Regional Touring		X				X
Potential unawareness of Lisbon as a motive to not choose it as a city break	X				X	
Visits of family and friends in Lisbon is not representative overall			X		X	
Perceived lack of business events and conferences in Lisbon contradictory to the rising MICE industry	X					X
Accessibilities and transportations overall bad image compared to its competitors	X					X
Tough competition of European destinations (Amsterdam, Barcelona, Madrid, Berlin)	X				X	

2. Elaborate an adequate segmentation and targeting for Lisbon, considering current tourist expectations and trends.

An oriented segmentation and targeting strategy is critical for any company to succeed, and the same principle can be applied in the case of a destination. Consequently, there is a set of segmentation criteria to be established and that will further impact on the target audience of Lisbon´s destination strategy. Subsequently, those criteria and respective contribution for target market definition will be presented.

2.1. Demographic variables

- ***Nationality***

This criterion is the starting point for the overall segmentation transposed in the case. In order to have an adequate strategy that conforms to its different target groups, there is an obvious differentiation between national and foreign tourists. Furthermore, there are also important distinctions to be made among the diverse foreign nationalities referred.

The most relevant nationalities for Lisbon are the Spanish that represent 20% of the total foreign tourists in 2011, the French and the Brazilian whose visits have increased in more than 20% compared to 2010. Furthermore, this BRIC was the country that recorded the higher positive y-o-y growth in total visits to Portugal considering the first half of 2011.

- ***Age***

According to the results of the Motivational Survey of 2009, the prioritized range for national tourists is between 26-35 years old when compared to foreign tourists, in whom the chosen age range is between 36 and 55 years old, not forgetting the rising Silver age market (> 65 years old population), that is referred as having increased the number of trips made between 2005 and 2008 in around 7% according to the WTO.

- ***Marital status***

In this indicator, the majority of foreign and national tourists is represented by couples (married or together) while the relative importance of single is higher in the case of business tourism.

There is also unanimity regarding the first target considered to be adult couples, while the Belgian and English refer senior couples, while all the other European nationalities refer young couples. Adversely, the importance of singles is relevant for Brazil and Portugal.

Additional Note: A reference is made to the relative importance of the male gender in the satisfaction survey, even though, due to the overall perception and outcomes pointed out towards couples´ predominance as typical Lisbon tourists, we decided to not insert a topic for the gender criterion.

2.2. Geographical

There is a distinction between Lisbon as a city and as a region referred along the case. Likewise, the suggested holistic approach is subject to create different target markets whether we consider Lisbon city and/or region. While the city is recognized by the closure between the modernity of Parque das Nações and its historical center of Baixa and Belém; the region offers outstanding beaches (Cascais), amazing palaces (Sintra) or religious experiences (Fátima) reinforcing the attention for a proper destination targeting driven by the city-region differentiation.

2.3. Psychographic & Behavioral

- ***First-Time / Repeated Visitors***

The distinction between first-time and repeated visitors is essential to characterize the behaviors towards a destination according to the expectation of a new experience or the image left by past experiences. In the case of Lisbon, the first time is faced essentially as a city break, a tour around the city, while the second and further visits are mainly to the region, proven by the visits enhancement to the city of Lisbon as a secondary destination in around 16% considering the period between 2008 and 2009.

This shows the potential of the whole area of Lisbon to be adapted to newbies or already knowledgeable targets about the destination.

- ***Motives to visit***

The motives to visit are key reasons to select a destination, driving future tourist behaviors. Regarding this component and according to the Motivational Survey of 2009, there is again a differentiation between national and foreign tourists as the big majority of the national tourists come for business purposes, while the international tourists visit Lisbon due to leisure motives.

- ***Benefits sought***

The benefits sought in a destination are linked to the previous point of “motives to visit” and derive from the main advantages that tourists seek for in a destination. The attributes that tourists pursue are quite important as they will impact on their perception about Lisbon. On this topic there is divergence around the benefits sought in Lisbon as:

- The Germans, Dutch and Belgian enforce an emphasis on accommodation importance and are stimulated by Lisbon´s culture;
- The Spanish and Italian value the price-quality of Lisbon being the geographical proximity and language critical factors to come to Lisbon;
- The British and French give more importance to the climate and to the hospitality and kindness of the host country natives.

- ***Lifestyles***

To conclude this psychographic and behavioral segmentation analysis, it is reckon that lifestyles influence tourism patterns as people have different life visions that lead them to distinctive behaviors towards a destination. In the case of Lisbon, certain types of lifestyles constitute important trends to consider.

Aligned with the previous assertion of the importance of single and young couples, the heart of backpackers in Lisbon hostels drives an important tourism source. Furthermore, the development and international recognition of Lisbon´s golf industry is an important sign of this sport to enforce visits to the city as almost 40% of the golf players come exclusively to play, assuming they will come back. Lisbon is also sought by tourists motivated by a deep religious mindset (going to Fatima, a worldwide recognized catholic sanctuary) or by tourists who enjoy the gastronomy and enology of the destination they select. In fact, 71% of the tourists that visited the city of Lisbon were motivated by these kinds of experiences due to its famous food and wines.

3. Define the unique value proposition of Lisbon brand and key drivers of its positioning.

Positioning definition is critical for a brand´s success. In the case of a destination, its positioning strategy should create an image on tourists´ minds surrounding a set of ideals and values that are able to identify the brand, the Lisbon brand. Due to the intangibility nature of a destination, the story around Lisbon´s positioning is sustained on a group of values defining the key messages that destination marketers want to transmit to their target markets, conferring to Lisbon a destination identity and a differentiation character in relation to its key competitors.
Those values are the foundations for the positioning and can be generally transmitted in a clear statement, highlighting the unique value proposition to be communicated by Lisbon as a brand.

A proposal for the value proposition of Lisbon could be: "Lisbon is a **beautiful reunion** of an **authentic and modern soul** sustained under the **seven hills of history** and providing **unique experiences** to **whomever** desires to visit this **resort destination**".

This sentence aims at demonstrating the values in which Lisbon´s positioning is sustained on. Hence, each one of the words has a meaning that contributes for Lisbon´s positioning definition.

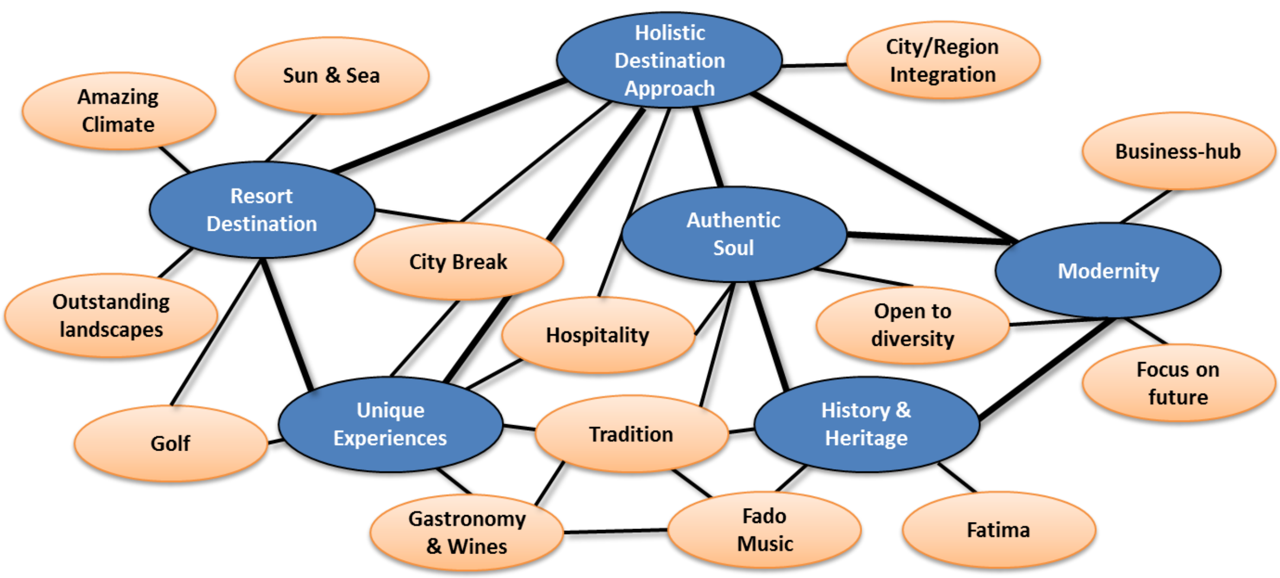
The adjective **"beautiful"** appeals to the light and vibrant character of the city, the sunniest capital of Europe, while **"reunion"** aims at establishing the integration between Lisbon´s City and Region in which we may find a **blend of modernity and history**.
In fact, Lisbon as a brand has to be seen in a holistic way, in which a **world excellence city break** is complemented by the surrounding municipalities that provide tourists with **authentic experiences** like Cascais´ beaches, Sintra´s heritage or Fatima´s spiritualism.
The capital of Portugal constitutes itself as a **resort destination,** providing an amalgam of sensations to its tourists, aligning a seaside city with a good weather all over the year. Furthermore, the beauty of Lisbon can be found not only in its **traditional** sites like Belém or Mosteiro dos Jerónimos, in its typical fado music or in its recognizable gastronomy or wines, but also on the **modern and sustainable driver for the future**, aiming at developing the city and being an important European economic and business hub.

Lisbon´s **living diversity** shows Portuguese **hospitality** and ability to welcome foreigners, being close to whomever desires to visit it.

As a summary to the key drivers of its positioning, an analytical framework described by mutually reinforcing activities may be used in order to show the alignment among the different brand values that converge to the overall positioning of Lisbon as a destination.

Subsequently, a graphical representation of the positioning drivers will be presented in *Figure 3*.

Figure 3 - Mutually Reinforcing Activities - Brand Values of Lisbon Positioning



4. In what extent do foreign tourists perceived image and behaviors about Lisbon´s main tourism "products" match with its desired positioning and promotion actions?

Lisbon tourism promotion priority was given to brand building. This aims at instilling Lisbon brand on the mind of the actual and prospect consumers (tourists). What we may see is a diversity of images on tourists´ minds bridged by their tourism expectations and destination marketing actions to promote the unique experiences of the capital of Portugal.

Summing up the desired positioning of Lisbon and the overall integration of the city and region proposed in the previous answer, there is a set of main topics that will converge into the analysis of the key tourism products of Lisbon as:

- A superior city break destination
- A den of heritage, history and culture
- A modern center oriented to business and MICE
- A center of unique and diverse experiences

Then, each one of those themes will be highlighted, concerning foreign tourists image, impact on tourist behaviors and integration with the communication focus of the Lisbon Tourism Association.

4.1. A superior city break destination

According to the World Travel Awards, Lisbon was considered as the European leading city break in the last two years. Despite the obvious recognition given by an international award, it is important to access if this acknowledgment is consistent with the image that foreign tourists have about the destination and if that has an influence on their tourist behaviors.

Regarding Lisbon as a short break, there is a balance on the preferences between the region and city. Overall, foreign tourists consider it as a highly important motive to visit Lisbon with all the countries having a score of more than 25% in the importance of short breaks to visit Lisbon in exception of the Brazilian (with 22%), according to the Motivational survey 2009 results.

The city break character is emphasized by the majority, especially due to its image of a good climate country. The Spanish tourists (the most representative among all) prefer this kind of visit due to the proximity to Lisbon in terms of language, culture and foremost geography.
For South European tourists, Lisbon has an image of a relatively good price-quality combination, while the Western European value the hospitality and kindness of the Portuguese, emphasizing the living diversity feature of Lisbon referred in the answer to question 3.
The positioning as a city break with the highest number of sun hours of Europe and the seaside city charm is reinforced even more through the assertion of Lisbon as a "beautiful" city, giving a special meaning to its value proposition prominence as a resort destination.

With the slogan" Lisboa viva" (Lively Lisbon), the Lisbon Tourism Association did a promotional campaign in which 12,5% of the overall budget was spent on the enhancement of Lisbon as a city break destination. In this case, countries like Italy, Netherlands, Belgium and Scandinavia were prioritized (with around 34% of the total promotion destined to each country/region) in detriment of Spain and Brazil with respectively 9% and 6%.
It is quite interesting to evaluate that the country that revealed the highest propensity for Lisbon´s city breaks (Spain), was the European market to which the Lisbon Tourism Association did less promotion about the shorts break feature. This can be a signal of the consideration that the main driver for the Spanish tourists to visit Lisbon is related to its proximity rather than an impact of direct promotion as also the weight given to the tourist target was significantly higher than for trade in the case of Spain (68% vs. 32%).

4.2. A den of heritage, history and culture

Lisbon is carved on an historical background, in which played a critical role on the discoveries period of Portugal. Therefore, traditional sites like Belém or Jerónimos Monastery are truthfully important manifestations of culture and history.
Generally speaking, according to the data presented in the case, especially for Western Europeans (highlighting the Germans), the main differentiation elements of Lisbon are related to its culture and history, being the keywords to define their image about the destination.

In another sense, the heritage of Lisbon is felt not only in the city but also in the overall region, as proven by the tourist behaviors towards Touring that refer mostly the region compared to the city, with the Spanish and the French being the most representative cases.

Furthermore, those tourist behaviors are in consonance with the emphasis given by the promotion of Lisbon brand by targeted market, with a weight of 22% given to Spain and 33% given to France, considerably ahead of the remaining countries from a promotion standpoint (table 8).
The patterns of visit to Lisbon city as a sole destination went down, while its weight as secondary destination increased alongside with the importance of the overall region of Lisbon. This reinforces the reunion advocated in the positioning statement, in which there is a blend of modernity and history given by the holistic regional approach taking into account the micro and macro-centralities that structure Lisbon.

4.3. A modern center oriented to business and MICE

The rising meetings industry (MICE) is one of the recent trends of Lisbon as it is recognized by some of the authorities in the matter (like the ICCA or the Great Hotels in the World). Even though, two different tendencies may be analyzed regarding a potential impact on the image of foreign tourists regarding this topic.
According to the International Congress Participants Survey of 2010, the participants considered the city as the place where best congresses took place ahead of big European capitals like London or Paris. Adversely, some others (like the French and Spanish) are skeptical about Lisbon as a business destination, while the majority of foreign tourists consider that there is a lack of business events and conferences occurring in Lisbon. Hence, this reveals that the desired positioning of Lisbon as a modern and business hub of Europe is still far from achieving.

The promotion of MICE represented 14% of the overall budget of the Lisbon Tourism Association, being particularly important to highlight the prioritized targets towards the USA, in which the total budget of promotion was destined to MICE, being the Americans the foreign tourists with highest propensity to visit Lisbon for MICE reasons.

4.4. A center of unique and diverse experiences

Lisbon is able to fulfill different and singular experiences as we were able to read from the case. Some of them are highlighted, such as golf, gastronomy and wines or the backpackers' lifestyle.

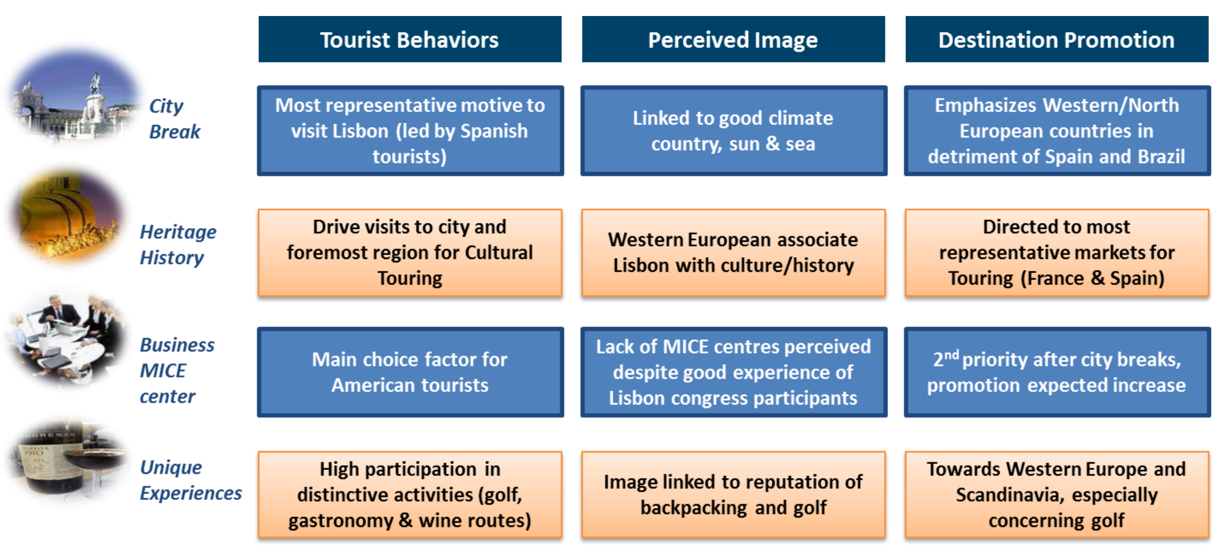
Regarding golf, Lisbon is seen as an elite destination for the practice of this sport as almost 40% of the players come solely to play golf, being this activity the first step for them to visit the overall region of Lisbon. The promotion of golf industry is mainly directed towards Western Europe, with predominance to Scandinavia, working as an important visiting driver for the Scandinavian.

In relation to gastronomy and wines, the several routes organized for food and wine tasting are among the preferences of many of the visitors (71% of the visitors to the city of Lisbon experienced activities related to the enological and gastronomic heritage).

Regarding backpackers lifestyle, Lisbon´s recent reputation with the top-3 hostels in the world is subject to generate an image of adventure and adrenaline associated to the backpackers´ experience positively contributing to the attraction of a niche segment to Lisbon.

Relatively to the last two last topics there is no available information about the relative importance in the overall budget of promotion of Lisbon Tourism Association, neither the orientation towards the different considered markets. A figure summarizing the four aspects described is presented below:

Figure 4 - Relationship between perceived image, tourist behaviors and destination promotion

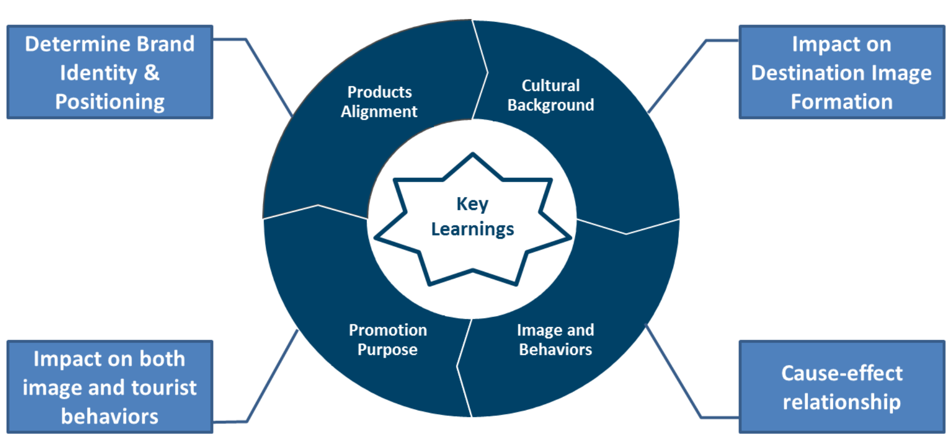


4.5. Key Learnings

In conclusion, we aimed at showing the link between tourist behavior patterns, destination image and destination promotion to evaluate the consistency with the proposed positioning for Lisbon. Certain key learnings can be observed and graphically represented below (*Figure 5*).

- Different cultural backgrounds impact on a distinctive image formation about a specific destination. According to each nationality, a unique importance is assigned to each destination attribute (e.g. Germans preferred image association of Lisbon was with history, whereas Spanish referred to geographical and language proximity);
- The motives to visit are linked to the specific image about a destination which is able to influence on tourist behaviors, whereas past experiences are also subject to shape a specific image about a destination;
- The purpose of a destination promotion (business, leisure, etc.) impacts on image and on tourist behaviors (e.g. 100% of the promotion directed to the USA was destined to MICE and the Americans were the most representative nationality among the foreign tourists for business motives);
- The positioning of a destination results from the alignment between several tourist products that are complementary and confer to Lisbon an identity and overall image taken from the confluence of the several destination attractions (e.g. Lisbon as a city break has a strong linkage with cultural and landscape touring, gastronomy & wines, while all those are elements of the Lisbon brand element mix).

Figure 5 – The Key Learnings Wheel



5. Define a VMO (Vision, Mission and Objectives) strategy for Lisbon. Refer at least 5 strategic objectives.

The VMO strategy definition is a term generally used in management and related to the ambition of a company in the short, medium and long-term. In the case, the VMO of Lisbon as a destination will encompass a vision, i.e. an aspirational driver for the future, a mission that will transform the vision into a tangible and realistic purpose and a set of strategic objectives that will consist on the key goals to be achieved consistent with the defined vision and mission.

A proposal of VMO for Lisbon is presented below:

Vision: Lisbon envisions being one of the top 5 European destinations

Mission: Lisbon has a two-fold mission, i.e. to sustain its dominant position within the national tourism context as well as to play a key role on the international tourism competitiveness of Portugal

Strategic Objectives:
The ultimate goals of Lisbon are related to an enhancement of the volume and value of tourists to the city/region as an important revenue driver, aligned to the brand emphasis in order to generate a positive and unique brand image as a destination. Those targets should be complemented by other fundamental objectives that envisage a future growth based on diversity and sustainability, promoting a global vision of Lisbon, for all types of tourists and during all the year. One may synthetize the key strategic objectives in three main axes.

1. ***Enhance Lisbon´s brand image by:***
    - Intensifying its awareness in the international destination panorama;
    - Promoting the unique experiences of the city and region of Lisbon;
    - Increasing the satisfaction levels of tourists regarding Lisbon.

2. ***Promote the sustainability and completeness of Lisbon as a destination for all individuals and throughout all year by:***
    - Diversifying tourist base of the city and region of Lisbon;
    - Reducing the seasonality impact;
    - Improving the accessibilities and infrastructures of/to Lisbon.

3. ***Boost volume and value drivers related to visitors and their expenditure levels by:***
    - Expanding the number of visitors from traditional and emerging markets;
    - Extending the average number of overnight stays of both foreign and national tourists in Lisbon;
    - Rising the average daily expenditure of both Portuguese and international tourists.

Additional Note: The time reference between short, medium and long-term objectives was not referred due to the interdependence and convergence of the different objectives considered, being difficult to identify a specific time-frame for their occurrence.

6. Which key marketing and strategic actions would you take to enhance the tourism in Lisbon? Relate them to the strategic objectives you described in the previous answer.

As described in the previous answer, Lisbon has ambitious targets for the future that should be assumed by the key destination marketers. Hence, a set of **partnerships between government and private entities** should be done in order to enforce a common effort on promoting Lisbon as a destination and stimulating the cohesion among the different stakeholders.

Furthermore, Lisbon brand should be promoted as a whole, unique destination characterized by a diversity of experiences. In this context, an improved communication to attract visitors is advised in order to generate customer loyalty strategies and to enhance its **brand image**.

For this purpose, Lisbon should seek for a reinforcement of its **presence in the main media gateways**, in key electronic and social networking platforms such as Facebook, by promoting Lisbon-related contents and developing partnerships with airline companies (specially low-cost companies like Ryanair or Easyjet), hotel booking websites, travel-related press media and tour operators in order to promote Lisbon´s tourism.

The uniqueness of Lisbon should be outlined through the development of certain actions that highlight the innovation regarding specific tourism products:

- The promotion of "**Nautic and Maritime Aventures"**, consisting in sea-related sports like windsurf, surf or sailing;
- The creation of a **"Museums and Monuments" card** for the overall region, including the main monuments and museums such as Jerónimos Monastery, Belém Tower, Palácio da Pena and Fátima´s Sanctuary;
- The creation of a **"Lisbon´s Traditional Experiences Event"** once a year, aiming at showing the main original products of the city and region, such as gastronomy and wine tasting activities or fado demonstrations;
- The formation of a partnership among the 5 best Spas of the region of Lisbon and organize a **"Spa Route"** offering to the tourists the possibility of trying different health and beauty experiences.

Aligned to the unique promotion to boost Lisbon´s brand image, some efforts should be directed towards its **diversity and sustainability**, showing that **Lisbon is a city for all individuals and throughout all year.**

Diversity means that Lisbon provides experiences that can be adapted to all the kinds of visitors. Therefore, it is critical to develop strategies to attack rising target markets and the ones in which its offer is seen as less competitive than in other European destinations.

Some examples of potential actions under this sphere could be:

- To increase the offer of **meetings and events** in order to mainly lift business tourism motives, aiming at augmenting the arrivals of executives to Lisbon. The universities can be pioneer on the promotion of those events. A proposal for ISCTE Business School is the organization of a conference with the topic "I believe in Lisbon" promoting a debate between public personalities, students and professors;
- To build a **theme park** in the region of Lisbon at the image of Disneyland Resort Paris driving family entertainment experiences and boosting this target segment;

- To promote **senior tourism programs**, involving sea, sun, cultural touring experiences and turning health tourism into an important segment;
- To emphasize the **communication of Lisbon´s best hostels** through outdoors and lampoles, showing to the backpackers that Lisbon provides them the best backpacking experiences of the world.

Regarding sustainability, Lisbon tourism should seek for a strong structural and developmental program in the upcoming years. In fact, some positive signs have been given on this topic with the planned TGV between Lisbon and Madrid or the cruise terminal in Stª Apolónia. Moreover, some proposals on this item are:

- To direct the **investments in the Lisbon Airport** destined to the creation of a "low cost terminal" to take advantage of the low cost flights traffic to Lisbon;
- To **upgrade national railways** in order to increase the visit of Portuguese tourists to Lisbon;
- To **renew urban/rural areas** of the region and city for tourism purposes.

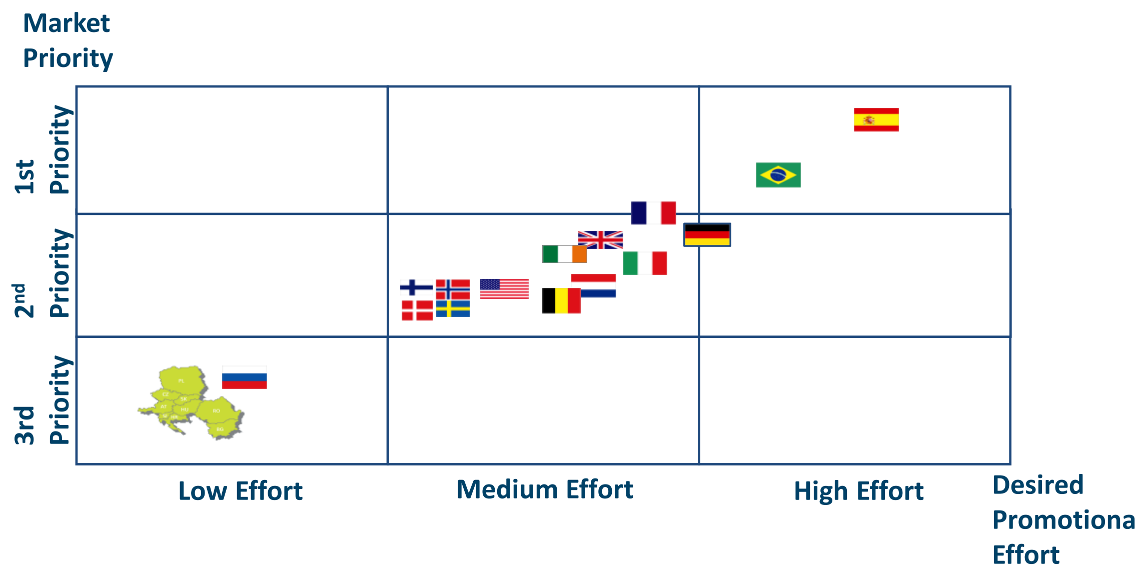
As a conclusion, all the actions presented above should contribute for the ultimate goal of **boosting volume and value drivers** referred in the previous answer, increasing the overall number of visitors, average overnight stays and expenditure levels of both national and international tourists in Lisbon.

7. Which markets should Lisbon prioritize in terms of both strategy and promotion? what should be the product strategy to apply for the most representative market? Recur to a strategic analytical framework to answer this question.

According to the information presented in the case, there is a series of markets considered for the strategic orientation of Lisbon. It is then important to define strategic groups to direct the prioritization of the destination strategy in terms of market potential and communication emphasis. Based on the assumption that the several markets "compete" for a higher target attractiveness consideration by Lisbon as a destination, the analytical framework of strategic target groups will be used.

Hence, market potential and promotion were the two axes that served the foundations of the *Figure 6* below:

Figure 6 - Strategic Groups for Lisbon (Markets and Promotion orientation)

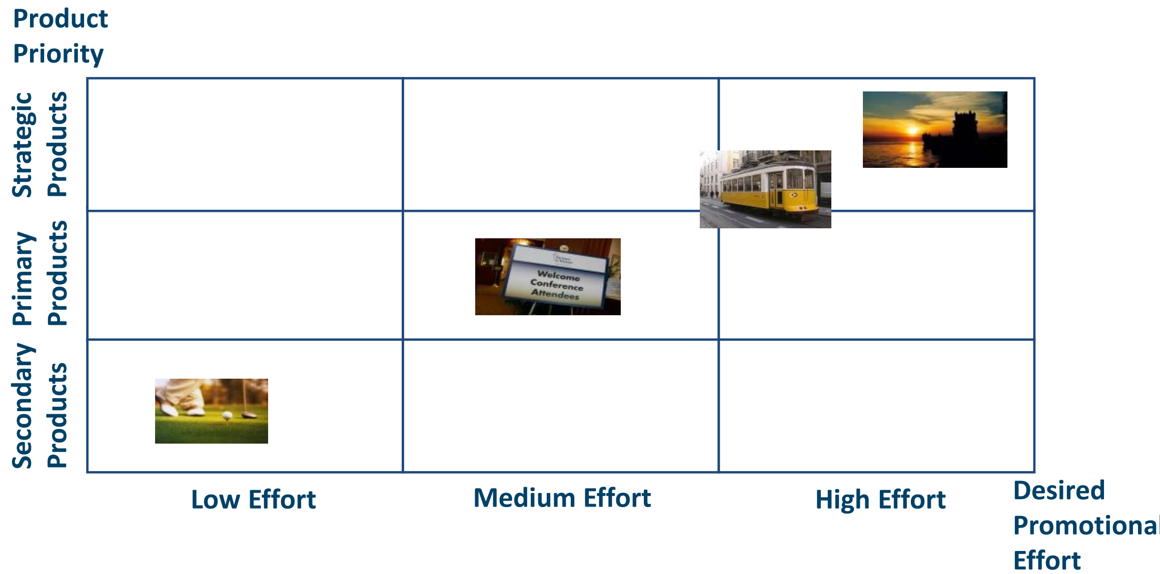


The most representative market:

- ***Spain:***
    - Maintain the promotional high effort and continue to consider this strategic market as key priority. Spain is the most representative market in terms of tourists and promotion;
    - Regarding the tourism product strategy, Lisbon must continue to bet on city breaks as the most valuable product to promote, while a special incentive should be given to touring, due to the cultural and language proximity with Spain;
    - The meetings industry should be enforced in terms of promotion even though at a medium level as there is a high competition of the main Spanish cities and priority to be given to other nationalities for this type of tourism (especially Western European, Scandinavian and American);
    - A final note reserved to the golf industry, which is considered as a secondary product for Spain, not being the most attractive market for the promotion of this sport.

Below, there is a graphical representation of Lisbon´s key tourism products to be promoted in Spain according to the prioritization described:

Figure 7 - Strategic Groups for Lisbon´s Tourism Products attained to Spain (Product and Promotion orientation)



The most promising market:

- ***Brazil:***
    - The promotional effort must increase dramatically in order to be consistent with the upward pattern of Brazilian visitors to Lisbon and economic booming of this emerging country;
    - A special emphasis should be given to the immense cultural link between both countries, stimulating cultural and heritage-related tourism activities;
    - Lisbon must reinforce its city break focus to the Brazilians as they are generally used to good weather conditions and are fans of beach and sea;
    - Additionally, the motive of visiting friends and relatives should be taken into account due to the huge Brazilian community living in Portugal.

Other Key Markets to consider:

- ***France:*** Medium effort in promotion and strategic market (in the border between 1st and 2nd priority) especially for city breaks and touring. The French tourists value the excellent climate conditions of Lisbon. Therefore, sun and sea related-products should be a priority to attack this market;
- ***Germany:*** Mid-high promotional effort is advised in order to boost image and bet on culture and history of Lisbon, key motives for the Germans to visit the capital of Portugal;
- ***UK/Ireland:*** A mid-level of promotional effort is advised regarding specific products such as golf. Furthermore, marketing actions to exploit the low cost airline traveller pattern of this segment are a key consideration;
- ***Italy:*** Mid promotional effort should be emphasized, especially to touring due to previous inexistence. Moreover, it is important to reinforce Lisbon as a city break among the Italians;
- ***Belgium/Netherlands:*** Increase the promotion on touring, particularly emphasizing its image of culture and history recognized among the Belgian/Dutch;
- ***USA:*** A critical market for the rise of MICE industry in Lisbon, should be considered as a fundamental niche market for this purpose;
- ***Scandinavian countries (Norway, Finland, Sweden and Denmark):*** Bet on city breaks promotion to take advantage of the high average expenditure levels of the Scandinavian. Golf is also an important source of revenue of this market.

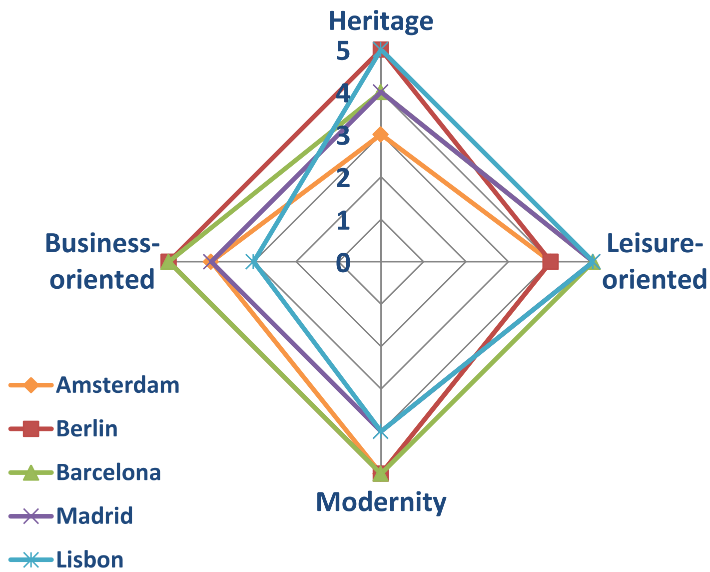
3rd Priority Markets:

- ***Russia and Eastern Europe:*** Essentially reinforce the brand building potential of Lisbon among the European emerging economies despite the lack of cultural link. Reinforce Lisbon´s positioning in some up surging tourism markets (Prague´s Czech Republic is an example).

8. According to your own image and information presented in the case, how does Lisbon´s positioning differentiates itself from its main competitors?

In order to define the competitive positioning of Lisbon, we may recur to the Positioning Map of comparison to the European rival destinations. A positioning map is presented below:

Figure 8 - Destinations Positioning Map



The chosen dimensions were related to the destinations´ orientation towards business or leisure and its positioning emphasis in modernity and/or heritage.

Lisbon´s positioning is focus on the dimensions of heritage and leisure, taking into consideration modernity but being less competitive than its rivals in terms of business-orientation. Contrastingly, Berlin and Barcelona are the most competitive destinations in the two latter referred axes. A special consideration should be given to Berlin that aims to be a "trendsetter" destination, focused both on heritage and modernity.

In another sense, Amsterdam is clearly focused on modernity axe, due to its values of creativity, originality, innovation and entrepreneurship. Relatively to Madrid, the Spanish capital aims at increasing its business orientation, even though not forgetting its cultural background.

As an overall conclusion, one may refer Barcelona and Berlin as the main competitors of Lisbon, mainly due to their positioning leverage on business-related topics.

2.8. Case Study Resolution Slides

Question 1 – Opportunities & Threats

Opportunities	Threats
• International tourism growth • Latin American expected high growth in outbound visits • Strong increase of Brazilian visitors in Portugal and Lisbon • Tourists coming from emerging economies • Potential opened by new and niche market segments due to socio-demographical changes • Portugal´s recent tourism results in a good shape • Leveraging tourism as a way out for current crisis • Lisbon tourism good prospects in terms of overnight stays, guests and hotel occupancy rates • Recent increasing average expenditure level (particularly for typical secondary target markets) • Upwards patterns of commercial traffic by air and sea • Rising low cost flights to Lisbon • Infrastructural developments to boost tourism	• Europe´s prospected declining share in world tourism • Asia is the fastest growing area in terms of inbound arrivals • Internal market for tourism with downward trend • Lisbon´s tourism dependency on European tourists may be affected due to the economic recession • Spanish tourists represent 20% of total tourists and present a negative variation • Eastern European markets growth for tourism (higher growth than EU15) • Seasonality of hotel occupancy rates (Jan- Feb with occupancy rates below 50%)

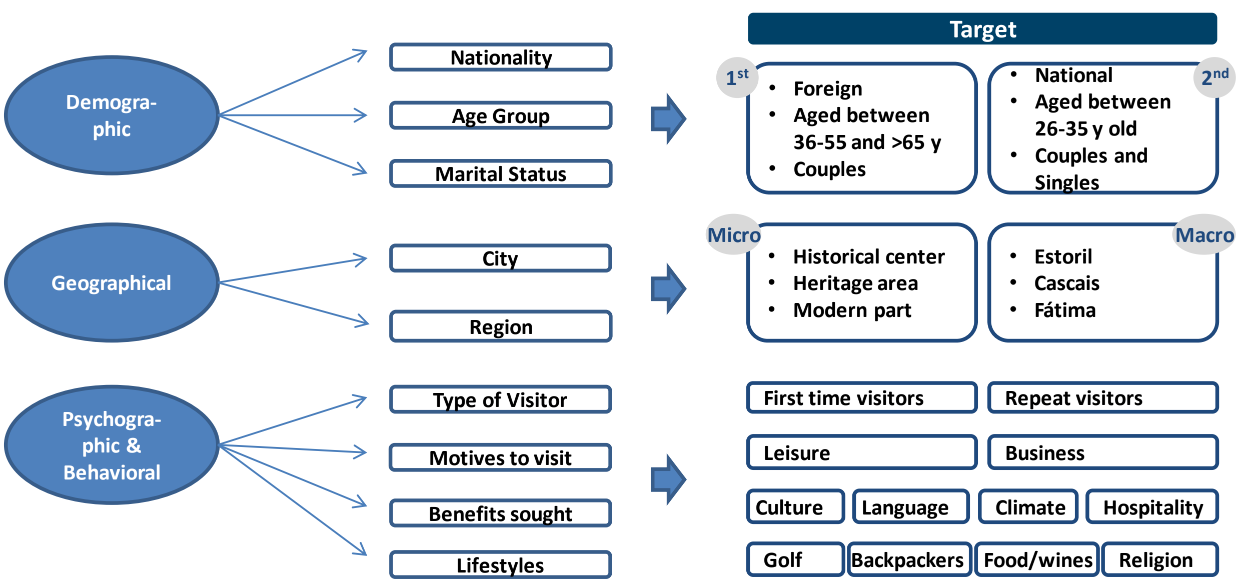
Lisbon – A Dream Destination? 2

Question 1 – Strengths & Weaknesses

Strengths	Weaknesses
• Integrated effort of tourism promotion between Lisbon´s region and city • Synergies among unique experiences taken from the overall regional tourism products • High attractiveness potential for several and diverse tourism segments • Heritage and historical background • Traditional and authentic products (wines, fado, Fatima) • International recognition for diverse purposes (leading city break and cruise destination, golf paradise…) • Lisbon´s preponderance in Portuguese tourism panorama • Growth of the city of Lisbon as secondary destination • Patent intention for recommendation driving positive WOM • Hospitality and kindness of Portuguese highly valued • Amazing weather conditions, sunniest capital of Europe • Lisbon as a colossus among backpackers • Competitive prices compared to European rivals	• Low emphasis given by foreign tourists to business motives to visit Lisbon • City Touring less relevancy compared to Regional Touring • Potential unawareness of Lisbon as a motive to not choose it as a city break • Visits of family and friends in Lisbon is not representative overall • Perceived lack of business events and conferences contradictory to the rising MICE industry • Accessibilities and transportations overall bad image compared to its competitors • Tough competition of European destinations (Amsterdam, Barcelona, Madrid, Berlin)

Lisbon – A Dream Destination? 3

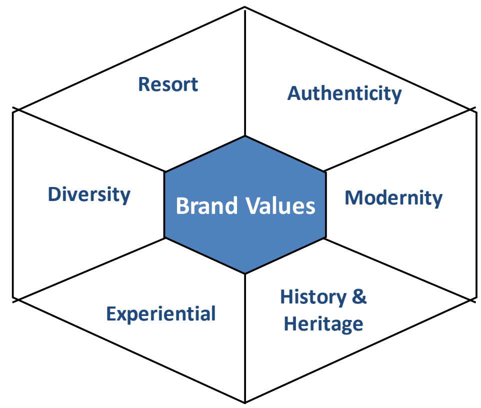
Question 2 – Lisbon´s Segmentation and Targeting



Lisbon – A Dream Destination? 4

Question 3 – Unique Value Proposition and Brand Positioning

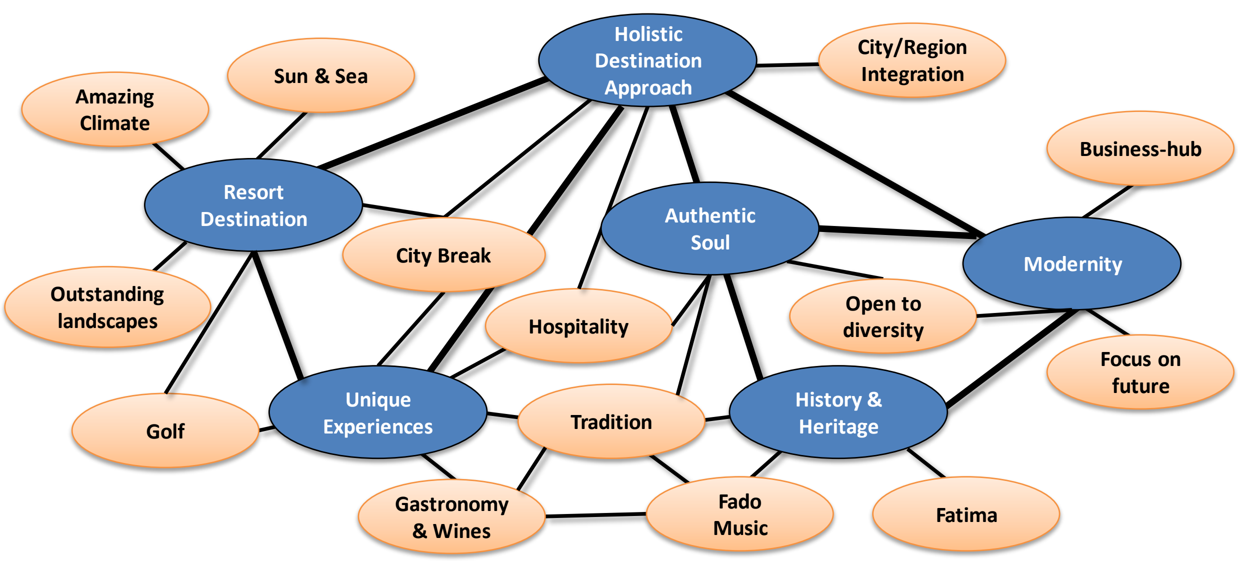
"Lisbon is a **beautiful reunion** of an **authentic and modern soul** sustained under the **seven hills of history** and providing **unique experiences** to **whomever** desires to visit this **resort destination**"



Unique Lisbon

Lisbon – A Dream Destination? 5

Question 3 – Unique Value Proposition and Brand Positioning
Mutually Reinforcing Brand Values

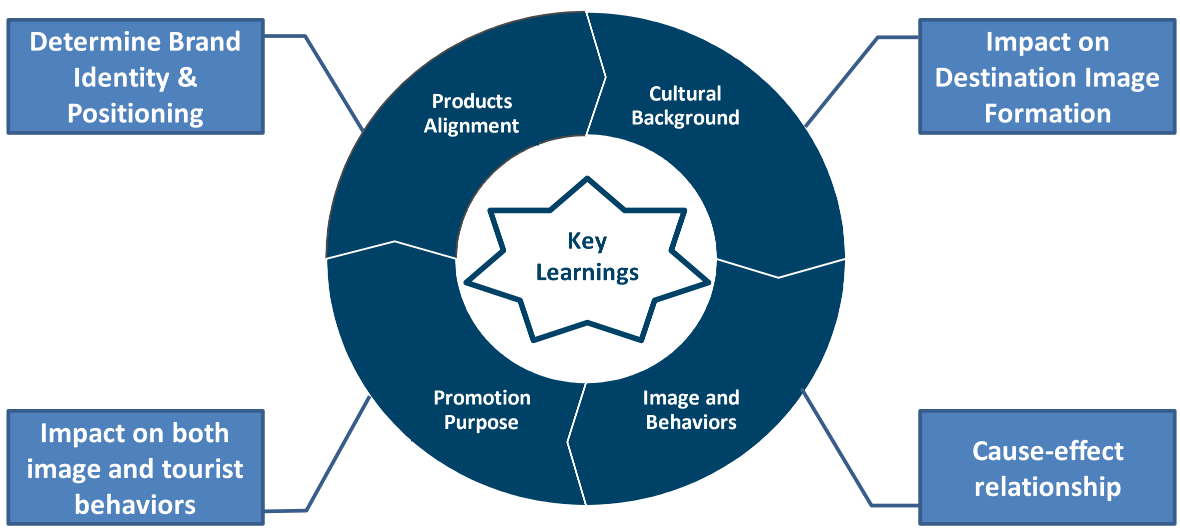


Lisbon – A Dream Destination? 6

Question 4 – Foreign tourist behaviors, perceived image and destination promotion regarding Lisbon´s key tourism products

	Tourist Behaviors	Perceived Image	Destination Promotion
 *City Break*	Most representative motive to visit Lisbon (led by Spanish tourists)	Linked to good climate country, sun & sea	Emphasizes Western/North European countries in detriment of Spain and Brazil
 *Heritage History*	Drive visits to city and foremost region for Cultural Touring	Western European associate Lisbon with culture/history	Directed to most representative markets for Touring (France & Spain)
 *Business MICE center*	Main choice factor for American tourists	Lack of MICE centres perceived despite good experience of Lisbon congress participants	2nd priority after city breaks, promotion expected increase
 *Unique Experiences*	High participation in distinctive activities (golf, gastronomy & wine routes)	Image linked to reputation of backpacking and golf	Towards Western Europe and Scandinavia, especially concerning golf

Question 4 – Key Learnings



Question 5 – Lisbon´s Vision, Mission and Strategic Objectives

1 Vision

Lisbon envisions being one of the top 5 European destinations

2 Mission

Lisbon has a two-fold mission:

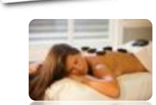
- To sustain its dominant position within the national tourism context
- To play a key role on the international tourism competitiveness of Portugal

3 Strategic Objectives

Brand Image	• Intensify awareness in the international panorama • Promote unique experiences • Increase satisfaction levels of tourists
Lisbon for All	• Diversify tourist base of both city and region • Reduce the seasonality impact • Improve the accessibilities and infrastructures
Volume/ Value	• Expand number of visitors from traditional and emerging markets • Extend average number of overnight stays and daily expenditure of both foreign and national tourists

Question 6 – Proposed Key Marketing and Strategic Actions to boost Lisbon´s Tourism

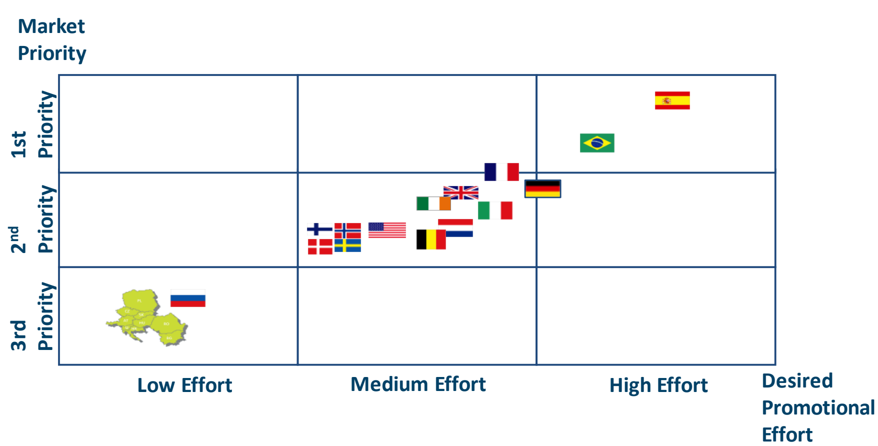
Objective	Marketing and Strategic Actions
Promote Lisbon´s Brand Image	• Form government -private entities´ partnerships promoting cohesion among destination stakeholders • Generate customer loyalty strategies: electronic and social networking platforms, partner with airline companies, hotel booking websites, tour operators and press media
Innovate in tourism products	• Promote Nautic and Maritime adventures • Create “Monuments & Museums” card • Make “Lisbon´s Traditional Experiences Event” • Create “Spa Route” through partnership among Lisbon´s top 5 spa´s



Question 6 – Proposed Key Marketing and Strategic Actions to boost Lisbon´s Tourism

Objective	Marketing and Strategic Actions
Attack rising/potential target markets	• Increase offer of meetings and events (e.g. IBS conference "I believe in Lisbon") • Build a theme park to create family entertainment experiences • Promote senior tourism programs, involving sea, sun, cultural touring experiences and promoting the health tourism segment • Emphasize communication of Lisbon´s top hostels through outdoors/lampoles
Foment sustainable development	• Planned infrastructural improvements (Lisbon-Madrid TGV, new cruise terminal of Stª Apolónia) • Creation of a low cost airport terminal • Upgrade national railways to boost Portuguese visits to Lisbon • Renew rural/urban areas of region and city of Lisbon

Question 7 – Strategic Markets Analysis



Key Conclusions

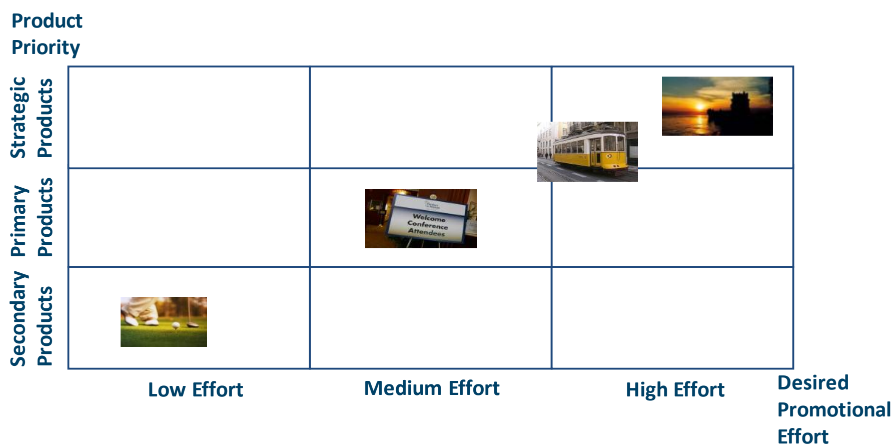
Spain is the most representative and Brazil the most promising due to economic boom/cultural link

City breaks should be emphasized to France, Italy and UK that value good weather, sun & sea

Cultural products directed to Western and North European countries while MICE focused in USA

Brand building development foundations on Russia and Eastern Europe

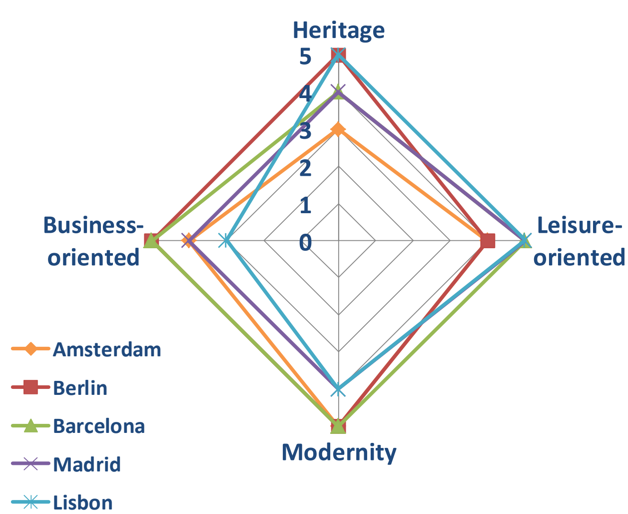
Question 7 – Strategic Products Analysis oriented to Spanish tourists



Key Conclusions

- City breaks are the most valuable product due to geographical proximity that favours short breaks
- Special incentive to Touring, due to cultural and language closeness
- Medium-level orientation to MICE due to other markets prioritization and competition of Spanish cities
- Spain is not a priority market for golf promotion

Question 8 – Lisbon´s Positioning Map



Key Conclusions

1. Lisbon´s competitiveness based on heritage and leisure
2. Berlin and Barcelona are the most competitive destinations in modernity and business-orientation
3. Amsterdam focus on innovation while Madrid emphasizes leisure
4. Lisbon should seek to improve its contemporary/business positioning

2.9. Management Lessons

Tourism is a rapidly evolving market with prospected growth, patent competitiveness and somehow a segment that shapes the overall image of world´s economy. The antique polarization of tourism around the European continent is subject to be altered, due to recent and future expected growth of emerging markets, such as Asia and Latin America.

This competitive world is also felt from a destination marketing perspective, as destinations compete for the overall best image in the mind of tourists, being able to drive their behaviors.

If at a first glance the intangibility feature of a destination may negatively impact in the application potential of business concepts within a destination context, this Lisbon case shows that a place can be branded and provide a rational and foremost emotional link between the prospects and the values advocated in the positioning of the destination.

Therefore, destination marketing involves the well-known parameters of a usual marketing strategy such as segmentation, target and positioning and a set of tactical actions involving the promotion of several tourism products at a certain price, being available in different places.

Lisbon is an example of a destination holistic approach, stimulating an all-round attitude surrounding its brand values and strategy. Hence, the success of a destination depends on the interdependence of several stakeholders, such as the country, cities or regional tourism associations, the travel and hotel industries, the media that help to promote the destination or the tourists that effectively visited or desire to visit a destination.

This case reflects also the crescent importance of an experiential-based approach, in which the word "experience" is critical for a perception and image creation about a destination. The destination marketing organizations (DMO´s) should then strengthen on the promotion of unique experiences in order to demonstrate their differentiation capabilities that can be based upon several values such as natural beauties (landscapes, beach, sea, sun), cultural and heritage backgrounds (particular music styles, gastronomy, enology, monuments and museums) or modernity and avant-gardism (such as business innovation centers and stylish architectural marks). This last referred feature is also translated on the strategic need to innovate and target new markets with new products/tourism attractions.

This is also the case for Lisbon, whose destination marketers should take into consideration the sources of opportunity opened by different segments able to show their needs regarding existing products or enforcing the destination to improve by discovering potential for other products aiming at matching those needs.

Lisbon´s case study presents a unique approach to a singular topic, capable to influence on several business and society spheres. Tourism and particularly destination marketing gives a new meaning to globalization and international competitiveness of cities/countries being able to generate a social, human and economic development. In fact, the art of travelling, receiving tourists and living unforgettable experiences can be inspiring for all of us.

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