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SEGMENTATION, POSITIONING AND BRANDING OF THE TOURIST PRODUCT OF OHRID

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Abstract: On today's more and more demanding tourist market, it is of great importance for all involved parties to acknowledge the fact that consumers are more informed than ever before and that they approach the market on a different level. Having this in mind, it is needed to state that the segmentation, the positioning and the branding are one of the key ingredients in this process. Because of this fact, the paper deals with what segmentation is and how it can help these involved parties in one major tourist city in the Republic of Macedonia to better understand these processes and to implement them onto the market itself. This paper helps with the input of knowing better the different approaches on the side of the segmentation, the main specifics of the positioning and gives hints regarding the branding of Ohrid as a tourist destination.

Keywords: tourism, segmentation, positioning, branding, Ohrid.

SEGMENTATION

Market segmentation can be defined as the process through which people (both tourism providers and consumers) with similar needs, wants and characteristics are grouped together so that a tourism business/organization can use greater precision in serving and communicating with these groups (marketing) (Pike, 2004). There are associated benefits of segmentation (e.g. identifying partnerships to promote networking and guiding research and development) but the bottom line is that it enables better marketing decisions, and promotes more viable operations. In more general terms, segmentation comes down to ties that connect two or more individuals (or businesses) together; it could be their age, their love of certain music, the magazines they read, or what their son or daughter is doing in school. The possibilities are endless.

In terms of its current market segmentation, from the previous research that was conducted, Ohrid has made a mistake of attempting to be all things to all people. It is difficult, and risky, to develop marketing strategies for the mass market. Strategies designed for the "average" customer often results in unappealing products, prices, and promotional messages. For example, it would be difficult to develop a campground that would be equally attractive to recreational vehicle campers and backpackers or promote a property to serve both snowmobilers and nature oriented cross country skiers.

The major markets segments for Ohrid should include free independent travelers, outdoor adventurers, and cultural/heritage enthusiasts. As with most tourism regions, the market and regional markets make up the large majority of visitors.

After several years of modest increases in visitors during the early 2000s, Ohrid has seen strong attendance increases since 2004.

Recognition and awareness of Ohrid itself is very low, even amongst key travel markets. Many regional visitors come to the area for its outdoor adventure experiences, but most long-haul and international visitors are in transit to other destinations, including many Europeans on the Greek coast. The number of destination-oriented tourism visitors is low but the potential for this market is excellent and growing.

National and international tourism trends show that visitor markets and the industry continue to change. Visitor motives for travel are becoming more attraction-oriented and fundamentally different from the socially-oriented free independent traveler of the past. Most visitors are also seeking more convenience, more learning and educational experiences and outdoor recreation activities where the experience is a safe one (i.e. soft adventurers).

Marketing is strongly based on market segmentation and target marketing. According to Kotler (2008), market segmentation is the process of:

- (1) taking existing and/or potential customers/visitors (market) and categorizing them into groups with similar preferences referred to as "market segments;"
- (2) selecting the most promising segments as "target markets;" and
- (3) designing "marketing mixes," or strategies (combination of the 4 Ps), which satisfy the special needs, desires and behavior of the target markets.

APPROACHING SEGMENTATION

There is no unique or best way to segment markets, but ways in which customers can be grouped are:

- (1) location of residence---instate, out-of-state, local;
- (2) demographics---age, income, family status, education;
- (3) equipment ownership/use---RV's, sailboats, canoes, tents, snowmobiles;
- (4) important product attributes---price, quality, quantity; and
- (5) lifestyle attributes---activities, interests, opinions.

To be useful, the segment identification process should result in segments that suggest marketing efforts that will be effective in attracting them and at least one segment large enough to justify specialized marketing efforts.

Market segmentation can be approached from two broad directions: supply side (e.g. grouping similar products together) or the demand side (e.g. demographics and behavioral patterns of tourists). The objective is consistent: trying to reach out to potential customers in a more cost effective manner. The levels of segmentation can be broad (e.g. businesses offering an 'outdoor' experience) or narrow (e.g. a segment of the population in a set geographical boundary, who have a certain medical condition, with children, in a particular income bracket).

The approach to segmentation is important however. There is a debate about 'Product Push' versus 'Market Pull'. The former is designing a product and packaging it and hoping that there is a market for it, while the latter attempts to find a niche market, identifying the needs and wants of individuals within that market, and designing a product to meet those needs. Generally it is more effective to undertake the market pull approach, but at the same time it is important to understand the strengths of a region's product. This is especially important when it comes to developing partnerships and products that fit with local community and cultural values. A mixed approach - market pull and 'manipulated or value-added' product push - is likely to be valuable when developing new product lines.

Characteristics that are commonly used to divide markets into segments include:

Supply Side	Demand Side
Product related	Demographic and Socio-economic Geographic
	Behavioral and Psychographic
Channels of distribution	Purpose of Trip

Geographic

The following comments focus on the three main bases for market segmentation: product related, demographic and behavioral.

Generally the more defined a market segment, the easier it is to reach out to individuals. Whichever approach is used, the segments (or niche markets) should be at least one of two things - Focused or Targetable - preferably both.

Focused: the stronger the ties that link people together the better; not just age and income but expectations, passions, habits, affiliations etc. The niche market does not have to be small to be focused, but usually the larger the market the weaker the ties.

Targetable: The easier it is to reach people in a niche market, the better. It is better if they are all receiving the same newsletter or visit the same location on a regular basis.

An example of a focused market is students. This niche is also targetable because it has its own specific newsletters, associations and conferences.

An example of a niche market that is not particularly focused but is targetable is the 'family people' segment. It is not focused as the only connection is the name; individuals are likely to have disparate interests and passions. With today's technology, however, it is a targetable audience.

PRODUCT RELATED SEGMENTATION

Without listing all the subgroups, typical product-related segmentation may be along the lines of the following:

Accommodations (from camp grounds to high end wilderness lodges)

Adventure Operators/Organizers (from family adventures and motorcycle tours to hunting and bird-watching)

Attractions (from museums and theme parks to sports clubs and festivals)

Transportation and Services (from train and van tours to restaurants and gas stations)

Another product-related segmentation strategy is based on seasons, for example grouping winter or summer activities. For those with an outdoor theme the product segmentation is often similar to the above, or even broader. One promotes the four choices of:

- Land Travel
- Water
- Winter

- Mixed Activities

DEMAND-BASED SEGMENTATION

Demographics - Understanding demographics is imperative to product development and segmentation, especially with regard to understanding trends in the market place. Demography (the study of age, sex, education, family status, life cycle etc.) is an excellent tool for product developers and marketers. The subject therefore plays a key-role in decision-making regarding demand for tourism products.

Age in particular is an important example. According to Welch & S. Calver, generally, the baby-boom generation (born between 1947 and 1966) is of prime importance due to its size and characteristics. It is well educated with above average income. Here it should be pointed out that this is not the case in Ohrid and Macedonia because of the income that this generation receives. The front end is also approaching (within 10 years) retirement age and will therefore have the money and the time to travel. The 'echo' generation (children of the boomers) are also creating peak demands on certain products and services. Born between 1980 and 1995, the front end is into their twenties and taking part in independent, adventure travel. They are also much more technologically advanced and have been brought up in a generation with strong concerns for the environment. Other sub sectors and age cohorts also need to be understood to more effectively communicate with them.

BEHAVIORAL SEGMENTATION

People's 'activities, interests and opinions (AIO's) also play a key role in decision- making and travel habits. These behavioral characteristics (also known as psychographics), when used in conjunction with demographics, provide a much stronger marketing tool for tourism businesses and planners. By understanding people's AIO's and their subsequent motivations, certain sub-groups can be targeted more effectively, as well as reflected in new product lines.

POSITIONING APPROACHES

This is the final step in the positioning process, and there are several different approaches to positioning any tourism destination (Aaker and Shamsby, 1982). 'While psychological positioning creates an image, this positioning approach completes the picture, using visual and words, to reinforce what the destination does best and what benefits are offered. Tourism marketers may decide to select the most appropriate of the following approaches, depending on the information gathered during market and psychological positioning.

According to (DiMingo, 1988), the following types of positioning can be identified:

Positioning by attribute, feature, or customer benefit. For this strategy, emphasis is placed on the benefits of the particular features or attributes of the destination. For example, Thailand promotes the friendliness of its people with the statement "The world meets in the land of smiles."

Positioning by Price Value. Some tourism destinations are not usually positioned on the basis of price because lower prices may be perceived as connoting lower quality. However, value offered to visitors can be effectively utilized as exemplified by Malaysia which claims "Malaysia gives more natural value." With this positioning statement Malaysia is appealing not only to the sense of value (more for the money) but also to its natural attractions.

Positioning with respect to use or application. Here a destination is positioned based on the reasons for visiting it. Bermuda positions itself to the American meetings market with "Sometimes you have to leave the country to get any work done" which promises productive meetings in a relaxed environment. Cancun, Mexico is positioned as "The meeting place for sun worshipers."

Positioning according to the users or class of users. In this case, positioning features the people who should visit Ohrid. Hong Kong appeals to the incentive travel market with the statement "When they've reached the top, send them to the peak," referring to Victoria Peak, a major tourist site in Hong Kong: Fisher Island, a luxury residential development in Florida, positions itself as the place "where people who run things can stop running."

Positioning with respect to a product class. This technique is often used to associate a destination with experiences that are extraordinary and/or unique. For example, the Principality of Monaco is positioned as "The fairy tale that does not end at midnight," or holding a convention in Thailand is "Smooth as silk where the sky's the limit, or "If you're looking for an ideal meeting place, here's one that's close to heaven" for Israel.

Positioning vis-a-vis the competition. This approach is used when it is necessary to meet the competition head-on; to bring out differences between destinations. This approach is not used frequently in tourism destination marketing since it may involve negative statements about another country or region. However, it is regularly employed in product and services marketing. For example, Visa credit cards compete with American Express by showing examples of places from around the world that do not accept American Express and only Visa cards are accepted. Ritz-Carlton Hotels is a little more subtle when they say, 'After a day of competition, you deserve a hotel that has none.'

Any of these approaches could be used to position Ohrid in the minds of foreign visitors. For example, since foreign visitors want to go where other tourists have already been, positioning according to users or a class of users may be appropriate. By developing a creative campaign, an operator can market the fact that many foreign visitors have been to the Ohrid Lake, and were impressed by its awe-inspiring presence. This may include testimonials from previous visitors or tour operators who can make a direct appeal to the target market. However, since the feeling of awe is an intangible construct, positioning statements must show a tangible example to illustrate this feeling.

Positioning is the ultimate weapon in niche marketing. Stripped of all its trappings, positioning analysis answers the following questions:

What position does a destination own now? (In the mind of the target market.)

What position does the destination want to own? (Look for positions or holes in the marketplace.)

Who must the destination outposition? (Manipulate what's already in the mind.)

How can it be done? (Select the best approach that will work for the target market.)

Positioning is a valuable weapon for tourism marketers. To position successfully requires recognizing the marketplace, the competition, and tourists' perceptions. Positioning analysis on a target market basis provides the tools to identify opportunities for creating the desired image that differentiates a destination from its competitors and for serving the target market better than anyone else.

PRODUCT POLICY AND BRANDING

According to Tribe (2005), the principal products that tourism provides are recreational experiences and hospitality. The factors that create a quality recreational experience often differ among people. A quality experience for one skier might include an un-crowded, steep slope. To another it might be a good restaurant and a chance to socialize. Decisions on what facilities, programs and services to provide should be based on the needs and desires of the target market(s). They should not be based on the preferences of the stakeholders or necessarily on what the competition is providing.

Recognize that a recreational/tourism experience includes five elements: trip planning and anticipation; travel to the site/area; the experience at the site; travel back home; and recollection. Businesses should look for ways to enhance the quality of the overall experience during all phases of the trip. This could be accomplished by providing trip planning packages which include maps, attractions en route and on site, and information regarding lodging, food and quality souvenirs and mementos.

Ohrid should also view its service/product in generic terms. Thinking of products/services in this manner helps focus more attention on the experiences desired by customers and also the facilities, programs and services that will produce those experiences. For example, campgrounds are the business of providing recreational "lodging" not just campsites to park an RV or set up a tent. Marinas should provide recreational "boating" experiences, not just slippage.

PRODUCT DEVELOPMENT

Ohrid has traditionally been regarded and developed as a beach and cultural heritage destination. While these are likely to remain its core tourism products for the immediate future, Ohrid can also offer a wide range of other tourism products, (such as mountaineering, rock climbing, diving, etc.), while the richness and variety of its cultural heritage adds a further dimension to its competitive edge. There are opportunities too for the further development and promotion of local handicrafts such as wood carving, painting and drawing on parchment papyrus which can help to spread tourism benefits more widely into the local community. Similarly, a range of eco-tourism and community-based projects can form part of a diversified and enhanced tourism product, including home stays, visits to rural villages, cultural heritage research projects, etc.

Potential also exists for spreading tourism to new areas away from the most-visited and at times crowded destinations to include, for example, village Velestovo, Skrebatno with good and preserved nature, all apart from the centre which could be well-positioned to attract business for meetings, conferences, exhibitions and incentive travel from domestic, regional and other major source markets (Marinoski, 2001).

On the shore of the lake, policy should be directed towards achieving a better balance between the supply of and demand for tourist accommodation in order to halt and eventually reverse the downward spiraling of revenue, occupancy and service standards. Efforts shall focus on reversing Ohrid's image of 'mass' tourism and poor quality accommodation, improving operational quality and increasing numbers to this core product segment. Repositioning Ohrid's image as a cultural and beach destination (also offering adventure, activity and eco-tourism opportunities) shall help revitalize coastal tourism, leading to a gradual shift from high volume: low value tourism to higher-value premier tourism. However, it is recognized that volume is still needed in order to fill beds and to provide employment.

In addition, free and fair but regulated access for local service providers will be provided to improve the diversity, quality and pricing of products locally available to the tourist.

A gradual change from being unknown to distinctive tourism destination, especially by the lake and cultural heritage must be done, by increasing demand through marketing recovery plans; assessment of hotel properties to see which would benefit from refurbishment; facilitating the provision of soft loans for refurbishment to three-star standard or higher; and introducing a moratorium on new development unless high standard and conformity with planning policy are assured. In the short and medium term, as Ohrid starts re-building its capacity to deliver high quality and more diversified tourism products, it shall continue to rely on a blend of high and low-volume markets. Once demand has recovered sufficiently, and facilities and services have been improved, prices can gradually be raised to a level sufficient to attract a higher value tourist clientele.

Quality of products should be emphasized at every stage of product development and the related services.

A clear identification of product opportunities and market requirements highlight strength and weaknesses, enable appropriate market positioning and product development strategies and therefore maximize resource allocation. It also focuses spatial planning and identification of investment opportunities (Tribe, 2005).

The key product opportunities for Ohrid are: Sun and lake; diving; eco-tourism; adventure; culture and entertainment. These products are based upon three broad themes:

Water-based tourism experiences;

Nature based tourism experiences; and

People and urban environment based experiences.

These themes will also provide the platform for product development and tourism marketing (Tribe, 2005).

In order to compete internationally Ohrid must upgrade its current provision of products and services and aim new product development at international standards.

It should be taken into consideration areas for tourism development targeted at a broad range of international, regional and domestic markets, and allocate resources accordingly.

The following should be realized:

- Support for repackaging and quality improvement of existing poorly planned facilities including the upgrading and refurbishing of coastal resorts' accommodation and other products;
- Support for eco-tourism as a development priority, including promotion of the eco-tourism as a products; and
- Support for the improvement of design, marketing and packaging skills of craft producers; co-operatives product development.

BRANDING

During the past years, people were not aware that Ohrid has the potential and resources to become brand recognizable in the region, in Europe and even worldwide. Because of that, so little was done in order to create and increase the awareness amongst people about the Ohrid brand. Its cultural, natural heritage, unspoiled nature and certainly the Ohrid Lake are more than enough to create an image and brand that would be highly recognizable. Maybe, that's because the term 'brand' is often misunderstood. The term 'destination brand' is used to refer to a destination's competitive identity. It is what makes a destination distinctive and memorable. It differentiates the destination from all others. It is the foundation of the destination's international competitiveness. This is one postulate that Ohrid must refer to and use it on the national and international market as well. It is so because the destination brand represents the core essence and enduring characteristics of a destination. A destination can change its moods and the way in which it presents itself to different market segments. But its core brand characteristics, like someone's personality, are essentially always the same. Ohrid Lake, the cultural heritage and the untouched nature are the DNA that defines Ohrid as a destination. It should run through every act of marketing communication and behavior by the Government and the destination's stakeholders. Also, the above said as a representative of the destination brand represents a dynamic interaction between the destination's core assets and the way in which potential visitors perceive them. It really only exists in the eyes of others. It is the sum of their perceptions, feelings and attitudes towards the destination, based on the way in which they have experienced Ohrid or on how it has presented itself to them.

A destination brand generally cannot be manufactured like a consumer product brand. It inherits its core assets: its landscape, people, culture and history. It exists in the way in which these assets are perceived by potential visitors and the emotional value they attach to experiencing them (Ryan, 2002).

OHRID BRAND DEVELOPMENT PROCESS

What needs to be done is to follow the brand development process in order to improve the image that Ohrid has and by that create a brand for Ohrid as a destination. It can be said that branding is for everyone. It is not the preserve of high-spending destinations. All destinations can, and should, develop a brand, regardless of the size of their marketing budgets. Destination brand values should run through all marketing communications, whether simple website pages, public relations messages or expensive TV advertising. Ohrid should focus on its core market segments when developing a brand. Their perception will define the brand's core characteristics. It is therefore essential to understand how they perceive Ohrid through targeted consumer research. Qualitative

research is the most effective way to identify consumer perceptions of the destination. People's psychological needs and travel motivation must be explored in sufficient depth to reveal their true motivation for travel, identify the experiences they are seeking, and to understand what kind of destination would satisfy them. This requires much deeper psychological investigation than merely establishing visitors' 'likes' and 'dislikes'. Also, stakeholders (e.g. political, commercial, travel businesses and residents) should be involved from the outset in developing the brand. This is the best way to obtain their buy-in to the concept, as well as secure their active participation as advocates of the brand in how they talk about the destination and how they behave towards visitors. This can also reinforce national/civic pride amongst residents. A fine balance is required to enable the creative flexibility necessary to appeal to different market segments while still maintaining a coherent destination brand that is universally recognizable.

Today, every city that has intention to become well known brand must compete with every other for its share of the world's commercial, political, social and cultural transactions in what is virtually a single market. As in any busy marketplace, brand image becomes critical: almost nobody has the time, the patience or the expertise to understand the real differences between the offerings of one destination and another, and so people fall back on their fundamental beliefs and prejudices about those destinations to help them make their decisions. Just as in the commercial marketplace that 'brand image' provides a short cut to an informed buying decision (Ryan, 2002).

Destinations with a reputation for being poor, uncultured, backward, dangerous or corrupt will find that everything they or their citizens try to achieve outside their own neighborhood is harder (among which Ohrid is seen at the moment), while destinations that are lucky or virtuous enough to have acquired a positive reputation find everything easier. Their brand goes before them like a calling card that opens doors, creates trust and respect, and raises the expectation of quality, competence and integrity. In this way, the reputation of a destination has a direct and measurable impact on just about every aspect of its engagement with other destinations, and plays a critical role in its economic, social, political and cultural progress.

For the travel and tourism industry, destination image is fundamentally important. The tourist stakeholders need to 'sell the destination' i.e. Ohrid to a vast international audience of ordinary consumers as well as a highly informed professional cadre of tour operators and other influencers, and the background reputation of the destination ultimately determines whether that 'selling' process is easy or difficult, expensive or cheap, simple or complex – and whether it gets gradually easier and more efficient over time, or whether it remains forever a struggle. A destination's reputation determines whether its messages are welcomed, and whether they are believed.

This is the reason why the concept of destination branding has become so important. The idea of 'brand equity' sums up the idea that if a place, product or service acquires a positive, powerful and solid reputation, this becomes an asset of enormous value – probably more valuable, in fact, than all its tangible assets, because it represents the ability of the place or organization to continue to trade at a healthy margin for as long as its brand image stays intact. Brand equity also represents the 'permission' given by a loyal consumer base for the destination to continue producing and developing its product range, innovating, communicating and selling to them (Ryan, 2002).

Put simply, a destination with a powerful and positive image needs to do less work and spend less money on promoting itself to the marketplace, because the marketplace already believes what it is telling them. It merely has to help buyers find and purchase the product. This is the target for Ohrid in the distant future.

But destinations with powerful brands have a different task, one that destinations with weak brands do not have. Just like any respected corporation, a highly regarded place has a big responsibility to ensure that the reality always lives up to its reputation. Indeed, in order to protect itself against competitors, such a place must exceed expectations through constant innovation. This task can of course be just as costly and just as challenging as building a reputation in the first place, but having a good reputation means already created positive mental image and trust in the perception of current and potential customers.

CONCLUSION

The implementation of the goals and measures contained in this dissertation marks the beginning of a new phase in the repositioning of tourism and changing the way it is perceived in Ohrid and Macedonia as well: from a seasonal activity which takes place in a few summer months, to an "industry" which denotes a significant part of life and work of the populace of the Republic of Macedonia, and which significantly contributes to the economic growth of the Republic of Macedonia and prosperity of its citizens.

Tourism marketing represents the systematic, coherent and consistent effort of DMOs to develop, formulate, and implement their strategies in order to achieve their main goal: making the tourism product a successful experience for their visitors. In a strategic approach, tourism marketing has taken on new dimensions, which increasingly reflect the perspective of visitors and those hosting them. There are several important benefits to undertaking a strategic approach to marketing. These advantages include: establishing the overall objectives and

strategies, providing a rational basis for decision-making on marketing and laying the foundation for effective implementation of the marketing plan. However managers must be aware of the planning model's pitfalls and limitations. The strategic approach to marketing at destination level is now widely adopted as a principle, although implementation of the action plans is still weak in some instances. It can be suggested that DMOs need to get away from promoting the destination to a mass market, and instead engage the visitor to ensure they effectively promote and provide the experience they want. This will require a major change in the role, structure and skills of DMOs. It is worth stressing that the marketing strategy and promotion program of a destination should be comprehensive, particularly reflecting the close relationship that must be maintained between development and marketing. The marketing strategy for both international and domestic tourism must be derived directly from the development strategy and the need to project a focused and positive image. A key principle applied in formulating the marketing strategy is the maintenance of a close relationship to the development strategy, which emphasizes product improvements and diversification. Therefore, marketing and product development go hand-in hand, and must be carefully coordinated to achieve successful tourism development. Additionally, demonstration or pilot projects can be an excellent means of showing how new forms of tourism (e.g. religious tourism, alternative and activity holidays) and development approaches can work. Bearing in mind that strategic marketing is not a panacea or a prescription for success, the following recommendations could be put forward to DMOs in order to effectively formulate and implement strategic marketing: (i) Marketing strategy is based on a careful analysis and assessment of the marketplace and depends on the use of appropriate marketing information.

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