U.S. International Pleasure Travelers' Images of Four Mediterranean Destinations: A Comparison of Visitors and Nonvisitors

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This study compares U.S. international pleasure travelers' images of four Mediterranean destinations—Turkey, Egypt, Greece, and Italy—for both visitors and nonvisitors. The image construct was conceptualized as having three components: cognitive, affective, and overall image. MANOVA analysis indicated that significant differences exist in all image components between the four destination countries. The findings revealed strengths and weaknesses of the four competing destinations and implications for positioning in the U.S. international pleasure market as well as product development and promotion strategy for the destinations.

U.S. international pleasure travelers constitute a lucrative and substantial segment for international tourist destinations. In 1995, 576 million people visited international tourism destinations and generated $373 billion international tourist receipts. With almost 55 million international visitors, U.S. travelers constituted almost 10% of the international travel market (Travel Industry Association of America 1996). Travel to Europe from the United States alone rose by 40% from 6.2 million to 8.5 million between 1991 and 1996. Like many other international destinations, Mediterranean destinations are competing to capture a larger market share of U.S. international pleasure travelers. For example, in 1997, Turkey attracted 406,000 U.S. travelers, a 11.5% increase over 1996, while Italy attracted 1.4 million U.S. travelers, a 1.2% increase over 1996. In 1996, Egypt received 174,000 U.S. travelers, a 13% jump over 1995, and Greece attracted almost 300,000 in 1997, a 14.1% increase from 1996 (World Tourism Organization 1998).

BACKGROUND

Research in the past two decades in travel and tourism has demonstrated that destination image is a valuable concept in investigating the destination selection process and has contributed to our understanding of tourist behavior. The image concept has been of great interest not only to researchers and academicians but also to industry practitioners and destination marketers. This increased interest can be attributed to increasing international tourism coupled with intense competition among tourist destinations. Developing a competitive position among tourism destinations is usually accomplished by creating and transmitting a favorable image to potential tourists in target markets (Goodall 1990; Gartner 1993). At the local and international levels, tourism destinations often compete on nothing more than the images held in the minds of potential travelers. Therefore, marketers of tourist destinations spend a great amount of money, time, and effort to create a favorable image to help entice prospective travelers to visit their destinations.

In the presence of a fierce competitive environment, destination marketers should have a sound understanding of travelers' images of their own destinations as well as an understanding of the image travelers hold of competing destinations (Calantone et al. 1989; Javalgi, Thomas, and Rao 1992; Ahmed 1991). To develop a positioning strategy, destination marketers should know the perceived strengths and weaknesses of their own and competing tourist areas. Potential travelers' images of the destination relative to its competitors provide useful insights into development of a positioning strategy. This information also enables the destination to see if perceptions (demand side) are compatible with the destination's resources and market offerings (supply side). If any discrepancy exists, destination marketers and planners should either alter image perceptions and positioning or improve and develop tourism products and services, or both (Calantone et al. 1989; Ahmed 1991).

STUDY PURPOSE

The main purpose of the study reported here was to compare U.S. international pleasure travelers' current images of four Mediterranean destinations: Turkey, Egypt, Greece, and Italy. This study hypothesizes that destinations will differ on

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perceptual/cognitive, affective, and overall image within visitors' and nonvisitors' segments. A literature review of destination image and positioning studies revealed two key issues that should be taken into consideration from practical, conceptual, and methodological standpoints: familiarity (previous visitation) with destination and conceptualization and measurement of image. First, both visitors (actual) and nonvisitors (potential) to destinations should be taken into consideration or at least previous experience with a destination should be controlled. Most scholars failed to control or include this variable in destination positioning studies. Second, a disaggregated approach focusing on components of image as well as overall image (global impression) should be used to better understand relative images and strengths and weaknesses of tourist destinations. With these points in mind, by disaggregating image into its perceptual/cognitive, affective, and overall image components, this study (1) investigates U.S. international pleasure travelers' current images of Turkey, Egypt, Greece, and Italy for those who visited (visitors) and those who did not (nonvisitors); (2) identifies the destinations' strengths and weaknesses in both visitors' and nonvisitors' segments of travelers; and (3) provides an example of how other destinations might assess their own competitive image.

RELATED RESEARCH

Destination Image and Positioning

Positioning is the process of establishing a distinctive place for a destination in the minds of the travelers in the targeted markets (Crompton, Fakeye, and Lue 1992; Kotler, Haider, and Rein 1993; Echtner and Ritchie 1993). Relative images of tourist destinations can be determined by comparisons across several competing destinations. This process will result in identifying destinations' strengths and weaknesses, competitive advantages, and distinctive competencies for each destination relative to other potential sites. The development of a positioning strategy includes (1) identifying a target market segment's images of a destination, (2) comparing these images with those of competitors, and (3) selecting destination attributes that meet the needs and wants of travelers and differentiate a destination from its competitors (Aaker and Shansby 1982; Javalgi, Thomas, and Rao 1992; Crompton, Fakeye, and Lue 1992; Ahmed 1991). If a destination is not differentiated from similar destinations, then the likelihood of being considered and chosen in the travel decision process is reduced (Mayo and Jarvis 1981).

One particular interest of destination image studies has been to identify image strengths and weaknesses of tourism destinations relative to other destinations based on perceived destination attributes and/or the perceived similarities between destinations with no reference to particular destination attributes (Mayo 1973; Anderssen and Colberg 1973; Goodrich 1978; Haahti 1986; Fenton and Pearce 1988; Gartner 1989; Crompton, Fakeye, and Lue 1992; Baloglu and Brinberg 1997).

Mayo (1973) demonstrated that the perceptions of eight regions in the United States varied along three dimensions: scenery, pleasant climate, and lack of congestion. Similarly, Anderssen and Colberg (1973) explored the perceptions toward nine Mediterranean destinations and found that

perceptions of destinations vary across eight image attributes. Goodrich (1978) measured travelers' perceptions and similarity judgments of nine tourist-attracting regions in and outside the United States. Two dimensions of similarity judgments of the regions were found: "entertainment" and "culture/life style."

Crompton, Fakeye, and Lue (1992) applied Woodside's (1982) conceptual approach to positioning, which suggested that effective positioning can be accomplished by matching benefits provided by a destination with benefits sought by a target market. The authors compared the Rio Grande Valley's image with Hawaii, Arizona, Florida, and California based on push and pull benefits sought by travelers. Although the authors have taken travelers' level of familiarity into consideration and compared first-time and repeat visitors on the pull and push benefit groupings, they only analyzed the differences between two subsamples (first-time and repeat) rather than relative positions of destinations within each subsample.

Haahti (1986) proposed a cognitive structure model of positioning and examined the perceptions of 12 European summer holiday destinations relative to each other to determine the relative position of Finland. The study identified two underlying perceptual dimensions: "ease and economy" and "different experience." The major finding of the study was that the perceptions of countries differed along these dimensions and 10 destination attributes used to evaluate them. However, Haahti's study was limited to the perceptual/cognitive component of image and travelers' familiarity with destinations was not controlled. Baloglu and Brinberg (1997), on the other hand, focused solely on the affective images of 11 Mediterranean destinations by using Russel and his colleagues' circumplex model of affect (Russel 1980; Russel and Pratt 1980; Russel, Ward, and Pratt 1981; Russel and Snodgrass 1987). Results indicated that Russel and his colleagues' proposed affective space can be used by tourist destinations as a positioning tool, as the affective images of tourism destination countries varied across both positive (arousing, exciting, pleasant, and relaxing) and negative dimensions (sleepy, gloomy, unpleasant, and distressing). However, it should be noted that the study did not take previous visitations into consideration.

Calantone et al. (1989) examined the images of eight Pacific Rim countries. Their analysis involved multiple origins, multiple destinations, and multiple attributes. The results indicated that tourist perceptions of a destination vary across image attributes as well as with vacationers' country of origin. The study focused on only those who actually visited the destinations selected. Gartner (1989) investigated U.S. residents' images of Montana, Wyoming, Colorado, and Utah to determine the underlying attributes of how those states are differentiated. The results showed that the states have varying image strengths and weaknesses based on selected destination attributes. The author cautioned that a major weakness of the study was its inability to control respondents' familiarity (previous visitation) with the four states. Similarly, Javalgi, Thomas, and Rao (1992) studied U.S. pleasure travelers' perceptions for Central Europe, Southern Europe, Scandinavia, and the British Isles and found that four regions were differentiated on perceptual attributes. Perceptual differences were also found to vary with trip type, namely, touring and outdoor trips. However, their study had several weaknesses. First, regions instead of

specific European destinations were used. Second, it was not clear that the authors controlled travelers' familiarity (previous visitation) with the regions included in the study.

Importance of Previous Visitation on Destination Image

It should be noted that most image and positioning studies discussed above failed to control travelers' familiarity with the destinations selected. Previous visitation or direct experience with a destination is likely to modify the image of the destination. Numerous studies have investigated image modifications due to actual destination experience (overt-behavior). Some of these studies used a longitudinal approach by which the modifications between travelers' pretrip and posttrip destination images were compared (Pearce 1982; Phelps 1986; Dann 1994). Other studies examined the image differences between travelers who visited the destination (visitors) and those who did not (nonvisitors) (Fridgen 1987; Chon 1990; Ahmed 1991; Fakeye and Crompton 1991; Hu and Ritchie 1993; Milman and Pizam 1995). These studies generally found that travelers' images were modified after visiting a particular destination and substantial differences existed between visitors and nonvisitors with regard to a particular tourist destination. Destination marketers should distinguish between visitors and nonvisitors when developing image or positioning strategies for their destinations in a specific market because the two groups may require different positioning and communication strategies. As Ahmed (1991) pointed out, a destination image as perceived by its actual and potential visitors plays an important role in determining its competitiveness as a tourist destination.

Components of Image

Scholars in several disciplines and fields now agree that the image construct has two main components: cognitive and affective evaluations (Dobni and Zinkhan 1990). Perceptual or cognitive evaluation refers to beliefs and knowledge about an object (evaluation of attributes of the object), whereas affective evaluation refers to feelings about the object (Burgess 1978; Holbrook 1981; Ward and Russel 1981; Zimmer and Golden 1988; Walmsley and Jenkins 1993; Gartner 1993; Baloglu and Brinberg 1997).

Research in environmental psychology has also determined that environments and places have perceptual/cognitive and affective images (Lynch 1960; Burgess 1978; Russel and Pratt 1980; Russel, Ward, and Pratt 1981; Hanyu 1993). Knowledge about the place's objective attributes is represented by the perceptual/cognitive component, whereas the affective component is knowledge about its affective quality (Genereux, Ward, and Russel 1983). Places also have an overall (global) image. This global image is usually formed as a result of both perceptual/cognitive and affective evaluations of the place (Mazursky and Jacoby 1986; Stern and Krakover 1993). Gartner (1986) indicated that people's perceptions of various attributes within a destination will interact to form a composite or overall image. Ahmed (1991) pointed out that evaluations of overall image and its components would be different and therefore, both should be measured to develop a more effective positioning strategy.

METHOD

Sample

The target population for this study consisted of adults (18 years of age or older) who had expressed an interest in taking a vacation in a foreign country. The sample population was chosen from a list of people provided by the Turkish National Tourism Office (NTO), who requested information about Turkey. The list consisted of 4,600 adult U.S. citizens who had not been to Turkey when they requested information. A self-administered questionnaire was mailed to a random sample of 1,530 individuals from that list in the summer of 1996. As an incentive for participating in the study, respondents were informed that they would be eligible to win several prizes. A few tour operators in the United States agreed to provide free package tours to Turkey and an airline company agreed to give a free round-trip ticket to be used for Turkey. A total of 448 questionnaires (a response rate of 29.6%) were coded for data analysis. Data were collected for four Mediterranean tourism destination countries: Turkey, Egypt, Greece, and Italy. These destinations were selected because all four destinations are recognized as major and competing tourist destinations and they are of interest to the researchers.

To guard against nonresponse bias, a random sample of 100 individuals who did not respond to the survey was telephoned, 39 of which agreed to participate. Data were collected on demographics, previous experience with selected countries, and selected image items. No significant differences were found between respondents and nonrespondents.

Measurement

Fourteen perceptual/cognitive items were selected on the basis of a review of previous literature regarding destination image. The contents of the four destinations' guidebooks and brochures were also examined and selected attributes were found reflecting the tourism offerings of those destinations. Respondents were asked to rate each country as a summer vacation destination on each of 14 attributes on a 5-point scale ranging from 1 (*offers very little*) to 5 (*offers very much*). Affective evaluations of destinations were measured on a 7-point scale using affective image scales developed by Russel and his colleagues (Russel 1980; Russel and Pratt 1980; Russel, Ward, and Pratt 1981; Russel and Snodgrass 1987). The scale includes four bipolar scales: Arousing-Sleepy, Pleasant-Unpleasant, Exciting-Gloomy, and Relaxing-Distressing. An overall image measurement scale was adapted from Stern and Krakover (1993). Respondents were asked to rate their overall image of each country as a summer vacation destination on a 7-point scale ranging from 1 (*very negative*) to 7 (*very positive*).

Data Analysis

MANOVA was used to assess image differences between destinations. MANOVA is more appropriate than univariate ANOVA to assess overall differences between groups (tourist destinations) when there are multiple dependent variables (image attributes) and when multicollinearity exists between the dependent variables (Hair et al. 1992; Bray and Maxwell

TABLE 1
DEMOGRAPHIC PROFILE OF RESPONDENTS (*N* = 448)

	Number	%
Age		
18-34 years	45	10.3
35-49 years	89	20.3
50-64 years	152	34.6
65 years or older	153	34.8
Total	439	100.0
Gender		
Male	212	47.6
Female	233	52.4
Total	445	100.0
Marital status		
Single	86	19.4
Married	265	60.0
Divorced/widowed/separated	91	20.6
Total	442	100.0
Education		
Grade school	2	0.5
High school	25	5.7
College	196	44.4
Graduate school	218	49.4
Total	441	100.0
Income		
Less than $25,000	26	8.2
$25,000-$34,999	39	10.4
$35,000-$49,999	43	13.3
$50,000-$74,999	83	24.0
$75,000-$99,999	58	15.4
$100,000 or more	106	28.7
Total	355	100.0

1985). Univariate significances were examined to see which image items were significantly different across tourist destinations. Finally, post hoc contrasts were examined to determine which destinations are differentiated on each image attribute. The Scheffé test is preferred because it is a conservative post hoc procedure (Hair et al. 1992). Before conducting the analysis, the distributions of the dependent variables were analyzed to check the homogeneity of variance and normality assumptions of MANOVA. No significant violation of assumptions was found.

ANALYSIS AND RESULTS

Demographic Profile of Respondents

The demographic profile of the respondents is presented in Table 1. The profile is presented in an aggregated nature rather than separating visitors' and nonvisitors' segments because no significant differences were found between their demographic profiles. The majority of the respondents were within older age brackets, were highly educated, and had relatively high incomes. Gender of the respondents was almost evenly distributed with 47.6% male and 52.4% female. Most of the respondents were married (60.0%). The demographic profile of respondents in this study was found to be consistent with the profile of U.S. pleasure travelers in Javalgi, Thomas, and Rao's (1992) study.

TABLE 2
VISITORS AND NONVISITORS OF FOUR MEDITERRANEAN DESTINATIONS

	Visited	
Destination	Yes	No
Turkey	231	138
	(62.6%)	(37.4%)
Egypt	86	321
	(21.1%)	(78.9%)
Greece	183	160
	(53.4%)	(46.6%)
Italy	120	97
	(55.3%)	(44.7%)

Note: Travelers who visited a destination more than once were excluded from the visitors' group. So the "Yes" column represents onetime visitors only.

Previous Experience

Table 2 shows the breakdown of visitors and nonvisitors to four destinations. Because multiple visits to a destination may affect the evaluations of it, the respondents who visited a destination more than once were excluded from the visitors' group.

Image Differences

Since MANOVA is useful when dependent variables are correlated, the appropriateness of the multivariate technique was tested by Bartlett's test of sphericity for both visitors and nonvisitors. Bartlett's test (3264.37 with 171 *df*, $p < .0001$ for visitors and 4,564.97 with 171 *df*, $p < .0001$ for nonvisitors) revealed that dependent variables were correlated and therefore, MANOVA was employed to analyze the data. It is often suggested that multiple multivariate significance tests used with MANOVA should be examined (Bray and Maxwell 1985). The overall MANOVA tests of Pillais, Hotelling's T^2, and Wilks's lambda (57 *df*, $p < .0001$) all were significant for both visitors' and nonvisitors' segments, indicating that the four Mediterranean destinations are differentiated based on their images.

Once an overall significant difference was found between destinations, one-way ANOVAs (univariate significance) results were examined to see which image items differentiated the destinations. Also, a post hoc Scheffé procedure at an alpha level of .05 was employed to see which destinations were significantly different on each image item. The same procedures were followed for visitors' and nonvisitors' segments of respondents. The results of one-way ANOVAs and post hoc comparisons of the destinations' average scores on each attribute are summarized in Table 3 for visitors and Table 4 for nonvisitors.

IMAGE DIFFERENCES WITHIN THE VISITORS' SEGMENT

Perceptual/Cognitive Variables

Significant differences at the .0001 level were found between the four destinations on 11 of the 14 perceptual/

TABLE 3

IMAGE DIFFERENCES BETWEEN FOUR MEDITERRANEAN DESTINATIONS (VISITORS)

	Destinations				
Attribute	Turkey ($n = 231$)	Egypt ($n = 86$)	Greece ($n = 183$)	Italy ($n = 120$)	Univariate Significance
Perceptual/cognitive*					
Good value for money	4.59[a]	3.94[b]	3.79[b]	3.34[c]	.00
Beautiful scenery/natural attractions	4.66[a]	4.10[b]	4.46[c]	4.54[a,c]	.00
Good climate	4.06[a]	3.11[b]	3.93[a]	4.11[a]	.00
Interesting cultural attractions	4.73	4.68	4.67	4.77	.26
Suitable accommodations	4.17	3.91	4.08	4.17	.08
Appealing local food (cuisine)	4.09[a]	3.41[b]	4.00[a]	4.45[c]	.00
Great beaches/water sports	3.57[a]	2.38[b]	3.87[c]	3.41[d]	.00
Quality of infrastructure	3.19[a]	2.67[b]	3.33[a]	3.58[c]	.00
Personal safety	3.74[a]	2.61[b]	3.87[a]	3.65[a]	.00
Interesting historical attractions	4.90	4.79	4.78	4.83	.07
Unpolluted/unspoiled environment	3.62[a]	2.74[b]	3.36[c]	3.24[c]	.00
Good nightlife and entertainment	3.31[a]	2.87[b]	3.51[c]	3.73[c]	.00
Standard hygiene and cleanliness	3.26[a]	2.45[b]	3.46[c]	3.61[c]	.00
Interesting and friendly people	4.42[a]	3.60[b]	3.99[c]	4.05[c]	.00
Affective**					
Unpleasant-pleasant	5.86[a]	4.26[b]	5.46[c]	5.92[a]	.00
Sleepy-arousing	5.82[a]	5.15[b]	5.64[a]	5.89[a]	.00
Distressing-relaxing	5.28[a]	4.01[b]	5.39[a]	5.40[a]	.00
Gloomy-exciting	6.14[a]	5.61[b]	5.87[b]	6.21[a]	.00
Overall impression***					
Overall image	5.85[a]	4.13[b]	5.47[c]	5.88[a]	.00

Note: Means with a different superscripted letter (a, b, c, d) are significantly different at the .0001 level.
* 1 = *offers very little*, 5 = *offers very much*. ** 7-point bipolar scale, where positive poles were assigned to the higher values.
*** 1 = *very negative*, 7 = *very positive*.

TABLE 4

IMAGE DIFFERENCES BETWEEN FOUR MEDITERRANEAN DESTINATIONS (NONVISITORS)

	Destinations				
Attribute	Turkey ($n = 138$)	Egypt ($n = 321$)	Greece ($n = 160$)	Italy ($n = 97$)	Univariate Significance
Perceptual/cognitive*					
Good value for money	4.42[a]	3.74[b]	3.76[b]	3.10[c]	.00
Beautiful scenery/natural attractions	4.64[a]	4.00[b]	4.60[a]	4.44[a]	.00
Good climate	3.95[a]	3.20[b]	4.00[a]	3.94[a]	.00
Interesting cultural attractions	4.74	4.58	4.74	4.63	.07
Suitable accommodations	3.80[a]	3.39[b]	3.95[a]	4.22[c]	.00
Appealing local food (cuisine)	4.09[a]	3.26[b]	4.10[a]	4.55[c]	.00
Great beaches/water sports	3.79[a]	2.54[b]	4.06[c]	3.36[d]	.00
Quality of infrastructure	3.05[a]	2.57[b]	3.38[c]	3.36[c]	.00
Personal safety	3.46[a]	2.34[b]	3.70[a]	3.59[a]	.00
Interesting historical attractions	4.73	4.76	4.83	4.80	.43
Unpolluted/unspoiled environment	3.66[a]	2.94[b]	3.44[a]	3.06[b]	.00
Good nightlife and entertainment	3.32[a]	2.76[b]	3.61[c]	3.77[c]	.00
Standard hygiene and cleanliness	3.06[a]	2.44[b]	3.27[a,c]	3.42[c]	.00
Interesting and friendly people	4.10[a]	3.40[b]	3.97[a]	3.98[a]	.00
Affective**					
Unpleasant-pleasant	5.64[a]	4.43[b]	5.76[a]	5.76[a]	.00
Sleepy-arousing	5.70[a]	5.05[b]	5.57[a]	5.91[a]	.00
Distressing-relaxing	5.15[a]	4.07[b]	5.52[a]	5.43[a]	.00
Gloomy-exciting	5.77[a]	5.16[b]	5.85[a]	6.02[a]	.00
Overall impression***					
Overall image	5.65[a]	4.30[b]	5.67[a]	5.50[a]	.00

Note: Means with a different superscripted letter (a, b, c, d) are significantly different at the .0001 level.
* 1 = *offers very little*, 5 = *offers very much*. ** 7-point bipolar scale, where positive poles were assigned to the higher values.
*** 1 = *very negative*, 7 = *very positive*.

cognitive items as perceived by the visitors' segment (Table 3). Only cultural attractions, suitable accommodations, and interesting historical attractions were viewed as being the same. Egypt was rated significantly lower than the other three countries on every item, except value for the money, where it was rated similar to Greece. This shows that Egypt was seen as less attractive by visitors than the three competing destinations, which should give the tourist industry in the country a great deal of concern.

The other three countries each had its strengths. For example, Turkey was seen as a good value for the money with interesting and friendly people and an unpolluted/unspoiled environment. Greece was rated most highly on its great beaches/water sports, while Italy was rated significantly higher on its appealing local cuisine and quality of infrastructure. How these impressions differed from nonvisitors and the implications of this for marketing strategy will be discussed later.

Affective Variables

Visitors rated Italy, Greece, and Turkey as more positive than Egypt on all of the affective variables. In addition, both Italy and Turkey were seen as more pleasant and exciting than Greece.

Overall Impression of Image

Turkey and Italy were also rated similarly and higher than Greece and Egypt on overall impression. Again, Egypt was rated lowest.

IMAGE DIFFERENCES WITHIN THE NONVISITORS' SEGMENT

Perceptual/Cognitive Variables

Significant differences were found between the four destinations on 12 of the 14 perceptual/cognitive items at the .0001 level. It is important to note that perceptions of nonvisitors differed from those of visitors on several variables, suggesting that nonvisitors may have inaccurate images of how countries are similar and what they have to offer.

Only interesting cultural attractions and interesting historical attractions showed no differences across all four destinations (Table 4). Nonvisitors viewed Italy, Turkey, and Greece similarly on four attributes: beautiful scenery and natural attractions, good climate, personal safety, and interesting and friendly people, and all three of the destinations were viewed more positively than Egypt on these attributes.

As with the visitors' segment, each destination except Egypt received the highest rating on at least one attribute, although for the nonvisitors the difference was not always statistically significant between all of the destinations. For example, Turkey stood out as being a good value and having an unpolluted and unspoiled environment, while Italy was rated highest on having suitable accommodations, appealing cuisine, good nightlife and entertainment, and was seen as having higher standards of hygiene and cleanliness. Greece stood out as having great beaches/water sports and a high-quality infrastructure.

Affective Variables and Overall Impression of Image

Although affective measures and the overall image dimension were statistically significant, comparison of their average scores revealed that there were no significant differences between Turkey, Italy, and Greece. The significant difference came from the difference between Egypt and the other countries. Turkey, Italy, and Greece were perceived significantly more positively than Egypt on all four affective image items as well as overall image.

DISCUSSION

Strengths and Weaknesses of the Destinations

Crompton, Fakeye, and Lue (1992) pointed out that travelers are more likely to select competitive destinations based on their perceived differences, and destination attributes receiving the highest perception ratings are not necessarily those that differentiate competitive destinations from each other. This study seems to support their statement. For example, the perceived ability of all four destinations to offer cultural and historical attractions was higher than all other perceptual/cognitive items. However, in the visitors' and nonvisitors' segments of respondents, all four destinations were perceived similarly on these two items. In other words, cultural and historical attractions do not serve as differentiating factors between the destinations. This finding has important practical implications. In the U.S. market, positioning efforts of the destinations included in this study usually focus on history and culture. The findings indicate that attempts to position and differentiate those destinations in the U.S. market based on history and culture, attributes which are equally strong for all four countries, may be difficult unless differences in history and culture are communicated effectively to potential travelers. It should be noted that the primary attributes that are used by consumers to make travel decisions still need to be communicated due to their importance. In addition, however, positioning efforts should also take advantage of secondary images and emphasize a destination's strengths relative to its competition to set itself apart.

In both the visitors' and nonvisitors' segments of respondents, Egypt was perceived less positively than Turkey, Italy, and Greece on most of the significant image items. One possible reason for this would be that recent terrorist attacks have tarnished the image of Egypt in the U.S. market. Therefore, for practical reasons, Egypt was excluded from the following discussion, which focuses on the strengths and weaknesses of Turkey, Italy, and Greece.

The main distinguishing attributes between all three destinations were found to be mostly perceptual/cognitive attributes such as value for money, accommodations, local food (cuisine), beaches and water sports, quality of infrastructure, environment, nightlife and entertainment, and hygiene and cleanliness. Affective items were found to distinguish destinations in the visitors' segment. A comparison of each destination pair is summarized in Table 5. Turkey was perceived superior to Greece and Italy as a good value for the money in both visitors' and nonvisitors' segments of respondents and superior to Greece and Italy on unpolluted

TABLE 5
STRENGTHS AND WEAKNESSES OF DESTINATION PAIRS

Turkey versus Italy
  Visitors

Turkey's strengths	*Italy's strengths*
Good value for money	Appealing local food (cuisine)
Great beaches/water sports	Quality of infrastructure
Unpolluted/unspoiled environment	Good nightlife and entertainment
Interesting historical attractions	Standard hygiene and cleanliness
Interesting and friendly people	

  Nonvisitors

Good value for money	Suitable accommodations
Great beaches/water sports	Appealing local food (cuisine)
Unpolluted/unspoiled environment	Quality of infrastructure
	Good nightlife and entertainment
	Standard hygiene and cleanliness

Turkey versus Greece
  Visitors

Turkey's strengths	*Greece's strengths*
Good value for money	Great beaches/water sports
Beautiful scenery/natural attractions	Good nightlife and entertainment
Unpolluted/unspoiled environment	Standard hygiene and cleanliness
Interesting and friendly people	
Pleasant	
Exciting	
Overall image	

  Nonvisitors

Good value for money	Great beaches/water sports
	Good nightlife and entertainment
	Standard hygiene and cleanliness

Greece versus Italy
  Visitors

Greece's strengths	*Italy's strengths*
Good value for money	Appealing local food (cuisine)
Great beaches/water sports	Quality of infrastructure
	Pleasant
	Overall image

  Nonvisitors

Good value for money	Suitable accommodations
Great beaches/water sports	Appealing local food (cuisine)
Unpolluted/unspoiled environment	

and unspoiled environment in the visitors' segment. Thus, it was evident that value and environment could serve as a unique positioning theme for Turkey in the U.S. market. On the other hand, Turkey was perceived as inferior to both Greece and Italy on good nightlife and entertainment in both visitors' and nonvisitors' segments and inferior to both Greece and Italy on standard hygiene and cleanliness in the visitors' segment, and on quality of infrastructure in the nonvisitors' segment.

Greece, in both visitors' and nonvisitors' segments of respondents, was perceived as superior to Turkey and Italy in terms of offering great beaches and water sports. This attribute could be a unique selling proposition for Greece in the U.S. market. Greece was perceived inferior to Turkey and Italy as a pleasant and exciting destination and had an inferior overall image in the visitors' group. Italy, in the visitors' and nonvisitors' segments of respondents, was perceived as superior to Turkey and Greece in terms of offering appealing local food (cuisine) and superior to Turkey and Greece in terms of offering suitable accommodations in the nonvisitors' segment and quality of infrastructure in the visitors' segment. Interestingly, no significant difference was found

on suitable accommodations in the visitors' segment. For Italy, comfort of travel experience represents a unique positioning theme in the U.S. market. On the other hand, Italy was perceived as inferior to Turkey and Greece in terms of providing an unpolluted and unspoiled environment.

Some differences were also detected between Turkey and Greece only in the visitors' segment of respondents. Turkey was perceived as superior to Greece in terms of providing beautiful scenery and natural attractions as well as overall image.

There were also some similarities in perceptions for specific pairs of countries. For nonvisitors, the perception of Turkey was similar to Greece in terms of offering suitable accommodations, appealing local food (cuisine), and unpolluted and unspoiled environment. For visitors, the perception of Turkey was as good as Greece in terms of offering appealing local food and quality of infrastructure. In the visitors' segment, Greece was perceived as good as Italy on unpolluted and unspoiled environment, good nightlife and entertainment, and standard hygiene and cleanliness. In the nonvisitors' segment, Greece and Italy were perceived similarly on good nightlife and entertainment and quality of infrastructure.

Strategies for Attracting Nonvisitors versus Visitors

It is not surprising that there were differences between visitors' and nonvisitors' perceptions of the countries in the study. Nonvisitors must form their perceptions on the basis of secondary information such as brochures, movies, word of mouth, and other media, while visitors can incorporate direct impressions gathered during time spent at the tourist destination.

Destinations willing to expand their market base will obviously have to tap into people who have never visited before. Therefore, it is important to know the perceptions of nonvisitors so that misconceptions can be corrected and perceived unique selling features can be exploited. Although most of the perceptual/cognitive variables were similar between visitors and nonvisitors, a couple of items were perceived differently. For example, as noted earlier, there were no significant differences between the countries in terms of suitable accommodations as perceived by visitors, but nonvisitors found differences between three of the four countries. Italy, which was rated highest for accommodations, could reinforce this perception in promotion aimed at nonvisitors, while Greece and Turkey need to improve their perception on this item.

On the affective dimensions and on overall image nonvisitors perceived Turkey, Italy, and Greece as being the same. Visitors, however, saw Greece as being significantly different (less pleasant and less exciting) than Turkey and Italy and had a poorer overall image. Especially considering no perceptual differences between the three countries were found among nonvisitors, Greece should study why the perceptual differences occur in visitors and seek to correct the impression through communication and product/service development efforts aimed specifically at visitors.

CONCLUSION AND IMPLICATIONS

A major purpose of destination marketers is to build a positive image of their destinations as well as differentiate themselves from competitors. This study provides insights regarding image strengths and weaknesses of Turkey, Egypt, Greece, and Italy in the minds of U.S. international pleasure travelers. These insights are illustrated from actual and potential travelers' perspectives. The findings can help the Mediterranean destinations investigated to assess their current images and positions relative to competitors in the U.S. market. This information, in turn, will help them compare their current position and desired position versus competitors. The destinations can also compare the image and position they currently attempt to project (supply side) with images actually held by U.S. travelers (demand side of image). This comparison should enable destinations to see the differences between their projected images and received images by U.S. pleasure travelers, which would help them plan their communication strategies.

Some limitations of the study are worthwhile mentioning here. The sample population of this study consisted of potential travelers who have requested information about Turkey. Therefore, the results for the nonvisitors' segment should be interpreted with some caution. Also, the incentives provided for sample members were related to Turkey only, which might have created a favorable response bias for Turkey. Although the cover letter clearly encouraged respondents to give their true and honest answers, this limitation should be kept in mind.

The analysis of the brochures and promotional material of destinations included in this research indicated that the countries studied position themselves as having rich historical, cultural, and natural attractions. The findings of the current study revealed that destinations can focus on and differentiate themselves on attributes other than history and culture in the U.S. market.

Positioning strategies for Turkey, Italy, Greece, and Egypt can be suggested as follows: Turkey could effectively be differentiated from the other three destinations by positioning herself as providing a good value and an unpolluted/unspoiled destination along with emphasizing similarities with her competitors. Italy can position as providing great food and comfortable accommodations, while Greece can position as an "active" vacation destination as well as emphasize the important similarities with competitors. Egypt, on the other hand, may find it useful to attack her competitors by offering price discounts and to try to position as a "good value" destination.

The strengths and weaknesses identified in this study provide guidelines for marketers of destinations for marketing and communications strategies. Destinations can examine their evaluations in both nonvisitors' and visitors' market segments to further differentiate their positioning and promotional strategies for the segments. They can also examine more "realistic" images of visitors to determine how they can improve their destination products and services. The findings can also help tour operators and travel agents that have business with these destinations in developing communication strategies for their clients.

From a theoretical standpoint, the study confirms that visitation may alter image and suggests that actual experience may alter not only image but also the positioning of destinations based on perceptual/cognitive variables, affective variables, and overall attractiveness. While perceptual/cognitive items were the most differentiating elements in the visitors' and nonvisitors' segments, affective items were distinguishing factors in the visitors' segment. Also, this study found that there might be variations between perceptual/cognitive, affective, and overall image components. Therefore, before tourist destinations decide among alternative positioning strategies, that is, features, benefits, vis-à-vis competitor(s), they should know their relative position in each image component.

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