

Destination Rebranding – The Islands of Tahiti, a case study.

Bachelor Thesis for Obtaining the Degree

Bachelor of Business Administration in

Tourism and Hospitality Management

Submitted to Lidija Lalicic, MSc.

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Vienna, 02 June 2015



THE ISLANDS of
TAHITI

SOCIETY ISLANDS | TUAMOTU ISLANDS | GAMBIER ISLANDS | MARQUESAS ISLANDS | AUSTRAL ISLANDS



Affidavit

I hereby affirm that this Bachelor's Thesis represents my own written work and that I have used no sources and aids other than those indicated. All passages quoted from publications or paraphrased from these sources are properly cited and attributed.

The thesis was not submitted in the same or in a substantially similar version, not even partially, to another examination board and was not published elsewhere.

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Abstract

Destination rebranding is highly complex and is often not undertaken, as it is received as a very radical process. Nevertheless, some destinations decide to take rebranding as an opportunity to reposition themselves on the market and to gain competitive advantage. In 2014, Tahiti Tourisme decided that they are in the need for a complete new brand identity as they were facing decreasing visitor numbers, struggled with an incorrect destination image and were targeting the wrong customer segment. The main aim of this paper is to analyse the reasons for the rebranding, as well as the impacts this process had on the destination. Moreover, this paper studies the various rebranding steps through which French Polynesia was able to create a new global visual and verbal brand identity that highlights its unique assets and differentiates the destination from its competitors. Based on a case study research approach that is supported by SWOT analyses, before and after the rebranding, and interviews conducted with two Tahiti Tourisme representations in Germany and the United Kingdom, this thesis identified that the rebranding process was necessary not only to stay competitive on the market, but also to attract a new type of customer, the 'discerning explorer'.

Acknowledgements

First and foremost, I would like to thank my family not only for giving me the possibility to study at MODUL University, but also for their continuous support during my whole life and my years of study, and especially during the time of preparation of this thesis.

Special thanks go to Professor Lidija Lalicic for her positive and motivating guidance, as well as for stimulating intellectual discussions which lead to a successful completion of this thesis. Many thanks also go to the teaching staff of MODUL University as they constantly encouraged me to grow both academically and individually.

Further, I would like to thank all interviewees for their participation, their time and their willingness to share their professional experiences. Without their respective inputs this research would not have been possible in such a way.

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1. Introduction

1.1. Introduction and Background

Tourism is one of the strongest developing industries nowadays and the choice of holiday destinations is steadily increasing. In addition, not only tourist destinations are constantly changing, but also tourists get more experienced and sophisticated, and are focusing more on the emotional appeal and the social status of destinations (Morgan, Pritchard & Pride 2004).

Though the concept of branding has been extensively applied to products, destination branding is a recent phenomenon, which started to become of high interest during the last years (Blain, Levy & Ritchie 2005). As destinations are very multidimensional, they have to develop strong brands to be able to compete and to differentiate themselves on the market (Pike 2005). Nevertheless, what the destination aims for, destination identity, and what the costumer perceives, destination image, can but must not always be the same. Therefore it is especially important to build and to represent solid brand identities, which allow destinations to be visible and competitive on the market (Buncle 2009).

1.2. Problem Definition

Sometimes destinations are not satisfied with their appearance on the market or with the costumers' perceived image. There are several ways of improving this situation, and one of the most complex ones is undertaking a rebranding.

French Polynesia is often perceived as a destination with a perfect postcard image, showing sandy beaches, blue skies and palm trees. Nevertheless, Tahiti and her islands are much more than just paradise islands. As GIE Tahiti Tourisme, which is the destination marketing organization of Tahiti, were no longer satisfied with the overall brand image, they decided to undertake a global rebranding in 2014 to create a consistent and powerful brand and trademark of the destination (WeberBenAmmar PR, 2014). According to an official press statement by FutureBrand in June 2014, Anne-Sophie Lesur, Chief Executive Officer of Tahiti Tourisme Board, said "The core elements of the new brand approach, plus the visual elements which will help us express our passion for French Polynesia, give us a platform to build a consistent story across all markets, informing and inspiring our target consumer and key audiences and partners alike. It marks a moment in time, in our story, where we look confidently towards the future and plan for it together with local industry, partners and government."

1.3. Research Gap

Tahiti recently performed a global rebranding in 2014. During an internship at the German representation of Tahiti Tourisme, the author had the chance to work with experts on the rebranding process of Tahiti and realized the lack of information on destination rebranding. Though destination branding is heavily discussed in literature, the concept of destination rebranding or refreshment is often only analysed in combination with case studies. The author decided to introduce the Islands of Tahiti as the optimal case study as no research has been conducted upon this field of research yet.

1.4. Research Question and Study Approach

The aim of this paper is to analyse the rebranding of Tahiti and to answer the main research question: *What does rebranding mean for Tahiti?*

Furthermore, the focus of the thesis lies on answering the following sub-questions:

- *What exactly is destination branding and which role does it play for destinations?*
- *Which factors are influencing the rebranding of a destination?*
- *Which opportunities or challenges may be faced during the rebranding process?*

Little to none research has been done on this event yet, which strengthened the intention to analyse this topic. To gain information, the author decided to focus on two of the main qualitative research methods applied in literature: a case study approach and use of structured interviews. The case study research is partially based on document analysis. To analyse the case in full detail, two SWOT analyses of Tahiti will be conducted. The first one focuses on the strengths and weaknesses of Tahiti before the rebranding was undertaken. This shall contribute to the reasons why the rebranding was necessary. The second SWOT analysis shall highlight the changes that emerged after the process. Following this, structured interviews with experts working at two Tahiti Tourisme representations in Germany and the United Kingdom will be performed.

1.5. Aim of the Study

This paper tries to support the argument by Vogt and Kaplanidou (2010) that destination branding is far more than only a slogan, a logo or a marketing campaign. This study shall disclose the main marketing strategies used during the rebranding process, as well as it shall identify the main drivers of the rebranding, the new visual appearance and the problems or opportunities faced. Generally speaking, this paper shall contribute to the existing knowledge about destination (re-) branding, emphasize both the positive and negative effects and highlight the brand transformation of Tahiti.

2. Literature Review

2.1. Destination Branding

Tourism can be seen as a unique industry, as destinations are far more multidimensional than other products or services (Pike 2008). Therefore it is important to create a strong brand to differentiate from competitors and to reflect a destination's valuable identity (Vogt & Kaplanidou 2010). But what is considered a brand and what is not? The next section of the thesis will explain this in more detail.

2.1.1. What is a Destination Brand?

Buncle (2009, p.6) states that a brand is a "competitive identity, [which] makes a product or destination distinctive and differentiates it from all the others". Therefore, identification and differentiation are the two main functions of a destination brand (Qu, Kim & Im 2010). It comprises a product or destination's core (inherited) characteristics, such as landscapes, culture, languages and history, and its manufactured assets, e.g. Disneyland, and has a legal status. In other words, a destination brand reflects the 'DNA' of a destination, as well as it identifies the interaction between the core elements of the destination and the perception of customers and visitors (Buncle 2009). It is also important that the brand is believable and reflects the features of a destination even if they may not be widely known (Vogt & Kaplanidou 2010).

On the other hand, a destination brand cannot be created and introduced in the same way as a product brand, as it is composed of for example people, culture and landscapes (Buncle 2009). Moreover, a brand is not only the visual or verbal elements, such as a name, logo or slogan (Vogt & Kaplanidou 2010). The destination brand shall be embedded consistently in all the visual elements used throughout marketing communication, but they are not the brand (Buncle 2009). It is a combination of visual and verbal elements, and the customer perception surrounding it, which makes a brand truly unique (Pike 2008). Furthermore, a destination brand can be a very attractive and helpful marketing tool for Destination Marketing Organizations (hereafter referred to as DMOs) to manage all stakeholders under one common theme, as they are constantly forced to target a wide range of geographic markets and customer segments. DMOs therefore have to strive for a stable brand consistency throughout their stakeholders to gain control over the so-called brand promise, i.e. what the customer expects and receives (Pike 2008). The overall aim of DMOs should be “to increase familiarity with the brand through repeated exposure and strong associations with the product category” (Keller 2003, cited in Pike 2008, p.181).

After clarifying what a destination brand is, there follows the question of why branding a destination? Why should potential customers visit country A, rather than country B or C? What are the main differences between destinations, and how can they be emphasized? Even though the principle of branding is nothing new in the world of consumer products, destination and place brand strategies have first been applied in the 1990s. Australia, Spain and Hong Kong have been the first countries and cities that approached destination branding on a national level, shortly followed by major cities such as Las Vegas and Pittsburgh (Baker 2012). In addition, there is little and only limited knowledge about destination branding, though it gained extensive academic interest (Saraniemi 2010).

Nowadays people’s expectations about vacation destinations become more and more sophisticated. Selecting a destination that is suitable for compacted vacation time, income, social value, and that also satisfies all emotional needs and wishes, is a difficult undertaking (Morgan & Pritchard 2004; Pike 2005). Morgan and Pritchard (2004, p.61) indicate that “the battle for consumers in tomorrow’s destination marketplace will be fought not over price but over hearts and minds, and this is how places have moved into territories previously reserved for consumer brands”.

According to Morgan and Pritchard (2004), branding might be the most powerful weapon to satisfy increasingly sophisticated customers, as well as the development of a strong

brand identity is crucial to survive on a globally competitive market. The process of branding can be seen as the generation of a unique set of associations with the destination in the customer's minds (Kavaratzis & Ashworth 2005, cited in Ashworth & Kavaratzis 2010, p.4). Morgan, Pritchard and Pride (2004, p.5) highlight that "although this 'total' branding task is by no means easy, the rewards are enormous". How destinations and their inhabitants, culture, landscapes, etc. are presented in the tourist images, is another key success to destination branding (Chellan, Mtshali & Khan 2013). If customers perceive a brand as strong and valuable, they will spread positive word-of-mouth, write good reviews and (in the best case) become loyal to the destination.

Besides the positive effects of branding, there still is some scepticism around the topic. As an example, Buncle (2009, p.10) states that the concept of branding a destination still is perceived inappropriate by many people, as destinations which hold historical landscapes and strong cultural heritage are not identified as something to be manufactured or marketed. But competition drives tourism destinations to highlight their natural and cultural benefits to be able to compete on the market.

However, after the principle of '*branding*' has been understood by destination brand managers, the negative associations can be eliminated. Destination branding "is not about disingenuously manipulating people's perceptions or the destination pretending to be something it is not" (Buncle 2009, p.11). For reasons of differentiation, destinations have to highlight their unique assets and point out why they are worth visiting (Buncle 2009). The creation of a clear image in the customer's mind is, again, crucial to the destinations' ultimate success (Morgan & Pritchard 2004).

Though customer's perception is the deciding factor for destination success, tourism destination branding is also closely linked to stakeholder management (Buncle 2009). As Jesca, Kumbirai and Brighton (2014, p.34) state "everyone who comes in contact with the visitors is part of the strategy to make the brand promise a reality hence there is need to involve each and every stakeholder". Creating a common vision of the destination is one of the main aims of destination branding, for which reason a strong network of stakeholders is required. Freeman (1984, cited in Jesca, Kumbirai & Brighton 2014, p.33) defines a stakeholder as a group or an individual that has an interest, someone who affects or can be influenced by the organization's goals. Though the impact of stakeholders on destination branding is under theorized in research, it has to be pointed out that organizations working with branding are working in a very complex surrounding. It has to be highlighted that

destination branding requires successful stakeholder management. A lack of partnerships between stakeholders can result in misleading and ineffective brand strategies, low attention to visual elements of the brand, such as logos, or even refusal of implementation of branding components or policies (Jesca, Kumbirai & Brighton 2014).

Pike (2005) gives six reasons why destination branding, and brand positioning in particular, by DMOs is a complicated undertaking:

- As discussed before, destinations are far more complex and multidimensional than products or services.
- DMOs have to target a geographically extensive market and a wide range of segments, trying to raise interest for existing and inelastic products, i.e. destinations.
- DMOs are reliant on government funding.
- “DMOs lack any direct control over the actual delivery of the brand promise by the local tourism community” (Pike 2005, p.3).
- DMOs cannot access previous tourists’ contact details to keep contact and to stimulate them to return, and thus achieve brand loyalty.
- Finally, the assumedly biggest problem DMOs face is funding. Successful brand campaigns do not necessarily lead to higher revenue, which forces DMOs to constantly seeking for funding sources, both private and public.

To sum up, the complexity of satisfying the target audiences and stakeholders through brand positioning, and additionally differentiating the destination from its global competitors, must not be underestimated (Pike 2005).

2.1.2. Components of Destination Branding

According to Vogt and Kaplanidou (2010), destination branding comprises many components, for example brand positioning, identity, image, equity and loyalty, which form the brand concept. Destination branding is mainly explained by the concepts of destination image and identity, thus the following sections will explain these two concepts in more detail. Being heavily discussed in literature, there still exists the confusion between these terms and hence discrepancies between these concepts can create challenges for DMOs. In short, *‘brand identity’* is what the destination marketers and stakeholders (the sender)

create and what they want the brand to “be”, whereas the ‘*brand image*’ is what the customer (the receiver) perceives of the brand and the destination (Qu, Kim & Im 2011).

2.1.3. Band Identity vs. Brand Image

Morgan and Pritchard (2004, p.65) state that “destination branding can help to bridge any gaps between a destination’s strengths and potential visitors’ perceptions”. Therefore destinations have to create a vision and a mission, which they want to communicate, as well as they have to develop strong values and components, and unique features of the brand which will support the message and initial idea (Vogt & Kaplanidou 2010).

The concept of ‘*brand identity*’ defines this. Baker (2012, p.194) refers to it as a “unique set of visual, auditory, and other stimuli that project the brand through its many applications in order to shape market perceptions”. Market perceptions include core characteristics and benefits of the destination, as well as logos (including fonts and colours), and slogans (Baker 2012). Aaker and Joachimsthaler (2000, cited in Hassan, Hamid & Al Bohairy 2010, p.274) indicate that brand identity is the basic idea and company’s wish of how the brand shall be perceived by the customers. Moreover, a distinctive brand identity can help potential customers to perceive a destination as prestigious, as well as it can increase the level of self-esteem, which can lead to a higher level of actions (He, Li & Harris 2011).

However, when customers experience products or services or receive messages from the destination, they are formulating a personal set of impressions, imaginations, expectations and emotional thoughts, resulting in an ‘*image*’ (Rajesh 2013). The difference between the two concepts of ‘*brand identity*’ and ‘*destination image*’ determines the success of a destination. Preferably the match should be high.

As a result, the concept of brand image has been heavily discussed in literature. According to Kolb (2006), the perception of a brand or destination in the minds of the customers can be defined as brand image. Destination image can also be defined as “an interactive system of thoughts, opinions, feelings, visualisations, and intentions toward a destination” (Tasci et al. 2007, cited in Rajesh 2013, p.68). Consumer perception matters as the brand image only exists in the minds of the customers and is not necessarily what the destination marketing organizations wished for. Moreover, customers are able to get an actual feel of the brand; they are experiencing it and connect different emotions and impressions to it, which then results in a certain brand image (Jesca, Kumbirai & Brighton 2014). Marketers can compare their destinations’ image to those of its competitors, but the perception of a destination

image lies in the eye of the individual customer (Morgan & Pritchard 2004). In general it can be said that “the more favourable the image of a destination, the greater the likelihood of choice” (Goodrich 1977, cited in Ashworth & Kavaratzis 2010, p.20).

When it comes to destination branding, there exists a tool to create a certain and (in the best) unique image in the minds of the customers. The process behind this is referred to as ‘brand positioning’, which involves the management of the brand, meaning that a destination’s beneficial assets are highlighted and built on (Vogt & Kaplanidou 2010). Generally speaking, ‘brand positioning’ “establishes what we want customers to think and feel” about the destination (Baker 2012, p.194). The concepts of ‘brand image’ and ‘brand positioning’ are closely related to each other. However, brand image is the sum of perception about a destination, and positioning involves action from the organization, such as advertisement and visual elements of the brand (Jesca, Kumbirai & Brighton 2014).

Brand positioning is about understanding customer’s perceptions and creating a positive image for the destination. Figure 1 shows the transformation from brand identity to brand image. Hence, supporting the idea of what the destination stands for, shall lead to a favourable high position in the mind of the customer compared to the competitive market. Positioning a brand is basically an emotional relationship between customers and destinations, as it is about the characteristics and core values of a place and the perception of people about it (Buncle 2009).

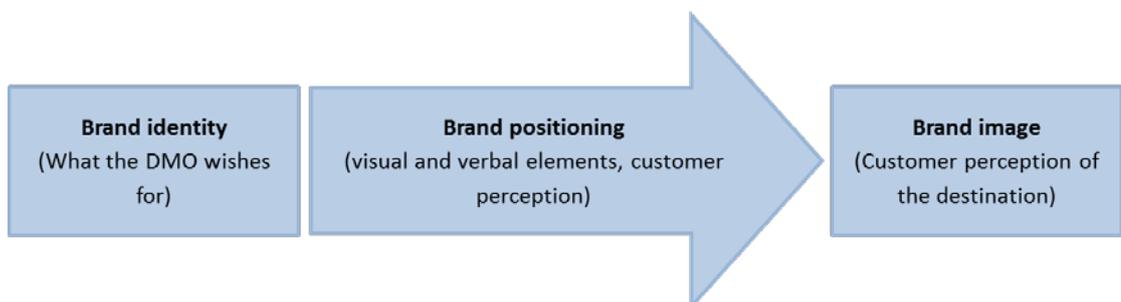


Figure 1: Destination branding concept (Pike & Bianchi 2013, p.3)

However, if the resulting destination image is not as desired marketers can manipulate clichés of a destination into something creative and better. For example, Brazil, which is one of the most branded countries worldwide, has many different assets, such as the carnival time, endangered rain forests, beaches, and sex. Though all these assets could contribute successfully to the brand, many Brazilians experience them as pejorative (Anholt 2004). Still, according to Anholt (2004, p.30), they can act as a “platform on which to build a believable global brand”. Furthermore, a destination image consists of two main

components: organic images and induced images. Organic images are created by the individual customer either through unbiased information sources or previous past experiences. On the other hand, external sources, such as destination marketing and advertisement, are influencing customer perception and are producing induced images (Rajesh 2013).

2.1.4. Destination Celebrity Matrix

Destination marketing tools therefore have a considerable influence on destination image. To help marketers with the evaluation of their destinations' performance, Morgan and Pritchard (2004) developed the *destination celebrity matrix*. Destinations with high celebrity value and high emotional pull can be identified as '*celebrities*', whereas places with low celebrity value and low emotional pull are known as '*losers*'. Brand losers have less status and almost zero anticipation for customers, meanwhile '*celebrities*', or '*brand winners*', are highly attractive for tourists for both prestige and emotional reasons. '*Potential stars*' are destinations with a high emotional pull factor, but low celebrity value. Finally, destinations with high celebrity value but low emotional pull are called '*problem spaces*'. Figure 2 clarifies this interrelationship between emotional pull and celebrity value. Truly, almost every destination strives for being perceived as a '*celebrity*'. Therefore, marketers are challenged to highlight a destination's assets and to build on emotional appeal, which might then result in a higher celebrity value (Morgan & Pritchard 2004).

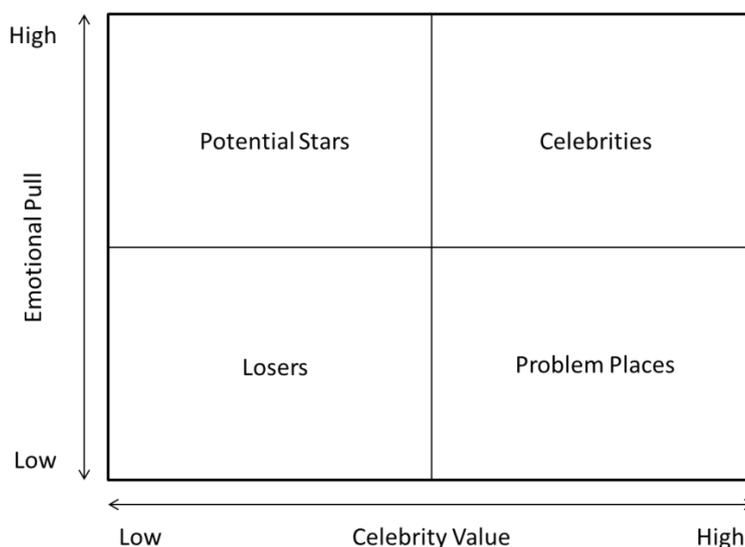


Figure 2: Destination celebrity matrix (Morgan & Pritchard 2004, p.66)

2.1.5. Destination Loyalty

Destination loyalty can be defined as “a measure of the attachment that a customer has to a brand” (Aaker 1991, cited in EURIB 2009b, p.1). In other words, destination loyalty is about the likelihood a customer will stay with a brand. In addition, Baker (2012, p.194) states that destination loyalty is “the single most important outcome of a branding strategy”.

Moreover, Aaker gives four reasons why destination loyalty is beneficial for companies. Firstly, retaining customers is cheaper than building a relationship to new ones. Secondly, Aaker introduces the term of ‘trade leverage’, meaning that returning customers are generating a steady source of revenue. Thirdly, existing customers can help attracting new customers through spreading positive word of mouth and mentioning the brand in front of their friends and family. And finally, and maybe most importantly, loyal customers are not very likely to switch to competing brands in difficult times, meaning that the organization has more time to respond to any type of threats (EURIB 2009a). According to Rajesh (2013, p.71) loyalty is strongly dependent on customer satisfaction and met expectations. Factors influencing destination loyalty are, amongst other things, a destination’s local facilities, infrastructure, natural and cultural attractions and safety issues, or generally speaking, the overall destination image. Also the level of personal involvement before, during and after visiting the destination has a high impact on the level of personal satisfaction and therefore also on destination loyalty (Rajesh 2013).

To define the level of commitment to a brand, Aaker developed a ‘Brand Loyalty Pyramid’, which identifies five degrees of brand loyalty (EURIB 2009b). Figure 3 displays these five levels, starting with ‘not loyal’ at the bottom and ending with ‘committed customer’ at the top. The five levels of Aaker’s Brand Loyalty Pyramid are named and identified as follows (EURIB 2009b):

- Switchers: this type of customers is not loyal to the brand at all. Customers tend not to purchase or consume the brand on purpose, but they may become a buyer accidentally or due to sale.
- Satisfied / habitual buyer: these customers do not look out for alternatives as they are completely satisfied with their well-tried brand(s). Only if they face problems with their usual brands, they are likely to switch to another one.

- Satisfied buyer with switching costs: barriers, such as switching costs, time loss or the impression of quality loss when switching to an unknown brand, are distracting these customers from changing to a competing brand.
- Brand likers: brand likers are customers who are not only pleased on a rational level (price, time and quality), but also are emotionally satisfied and linking positive experiences to the brand. In general, they are truly enthusiastic about the brand.
- Committed buyers: these customers are extremely satisfied, as they can link their personal values directly to the brand.

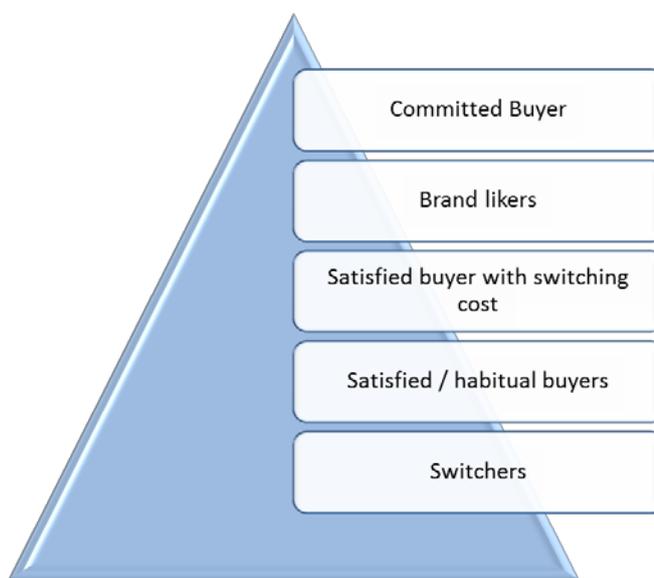


Figure 3: Aaker's Brand Loyalty Pyramid (EURIB 2009b, p.1)

2.1.6. Relationship between Destination Identity, Positioning, Image and Loyalty

Taking all these things into consideration, the author came to the following conclusions. The concept of 'brand identity' describes the picture of a destination which destination marketers or stakeholders want their customers to imagine. On the other hand, what consumers really perceive is the 'brand image', which includes the elements of the brand identity as well as their personal emotions, experiences and images of the destination (Kolb 2006; Jesca, Kumbirai & Brighton 2014). Finally, what puts these two terms into relation is 'brand positioning'. Brand positioning can be understood as the combination of the organization's thoughts and wishes, and the consumer's impressions; hopefully resulting in an overall positive destination image. A positive destination image can then lead to 'destination loyalty', which can be seen as the most important goal (Baker 2012). The

higher the level of customer satisfaction, the likelier the possibility that customers become loyal, which can result in stable sources of income and reduced marketing cost (EURIB 2009a).

2.2. Destination Rebranding

Now that the terminology of *'destination branding'* and its components have been discussed in detail, this question came up: What can National Tourist Offices (hereafter referred to as NTOs) do if the destination image is not matching the brand identity and therefore is not desired? The answer to this is simple, though its implementation is not. NTOs, who struggle with the perception of their brand, can either undertake a *'rebranding'* or a *'refreshment'* (Buncle 2009). Before explaining these two concepts in detail, a general introduction has to be given. Buncle (2009, p.79) states that "the ideal situation is for brands to live for as long as possible". But how long can a brand last and for what reasons should it be changed? Before it can be decided whether a *'rebranding'* or a *'refreshment'* of a destination brand is necessary, it is important to remember that both strategies have to be harmless, meaning that the brand platform (i.e. the audience) is not disturbed. Additionally it has to be pointed out that even well established and profitable destinations have to undertake a restructuring of their brand from time to time, to maintain their degree of esteem (Buncle 2009; Baker 2012). The following paragraphs will now look at the definitions and the difference between *'rebranding'* and *'refreshing'*.

According to Baker (2012, p.54) *'rebranding'* "involves a process where an outdated or irrelevant brand identity is modified and re-launched with a new focus". Chellan, Mtshali and Khan (2013) define the primary goal of rebranding as a change in the organization as well as it might support a new destination image, leading to a new customer perception. In general, rebranding is a change of the brand identity and the brand 'DNA', such as after revolution, major economic crisis or radical change in the destination's character, which has both advantages and disadvantages. One big disadvantage is clearly the fact that rebranding is a highly expensive process. Furthermore, the brand value, which comes mainly from customer recognition and a set of brand associations, might be lost through name change, leading to a loss of brand equity. Hence, years of marketing effort can abruptly be eliminated. On the other hand, rebranding can also have positive effects. As rebranding can be seen as a *'fine-tuning'* of the brand's visual and verbal components, it

can stimulate new markets, reach new target groups and increase competition (Buncle 2009; Baker 2012; Chellan, Mtshali & Khan 2013). Taking these arguments into consideration it shows that rebranding is clearly nothing that should occur as frequently as for example marketing campaigns.

2.2.1. Reasons for Destination Rebranding

But why are some destinations still undertaking a rebranding? To begin with, the difference between destination and product rebranding has to be highlighted. Basically, main reasons for destination rebranding include “a change in ownership structure, in corporate strategy, in competitive conditions, or in the external environment” (Chellan, Mtshali & Khan 2013, p.19). Product manufacturers can identify reasons for rebranding if for example the product has failed, sales revenue for the product decreased heavily, consumer tastes have changed drastically, or if the product’s reputation and recognition has been severely damaged. Manufacturers can change their product’s identity or even the brand identity more easily than destinations. NTOs often do not have direct control over the destination’s main assets, such as its culture, heritage, and nature, in a way that companies have over their products. Reasons for changing a destination brand are usually a change in consumer taste or an increase in competitive markets. Therefore, as destinations are not able to undertake a rebranding of their core brand in the same way as product manufacturers can, a ‘refreshment’ of the brand is more appropriate and more frequently used (Buncle 2009). Baker (2012, p.54) identifies a brand refreshment as sort of a “facelift [...] [that] may include a name change, new logo and colours, updated packaging, point of sale material, [and] a new advertising campaign”. As this is the most common undertaking, it is more reasonable to think of a brand ‘refreshment’ rather than of a complete ‘rebranding’. Refreshment is less radical than rebranding, and most of the time a refreshment of marketing strategies is sufficient, rather than of the brand itself. NTOs and DMOs should be a hundred percent sure that rebranding or refreshing is necessary, otherwise they might experience a very expensive mistake. Additionally, periodical reviews of the brand and the core values should be undertaken to ensure relevance of the brand to the market (Buncle 2009).

2.2.2. Destination Brand Fashion Curve

But when is a refreshment of a destination brand reasonable? Morgan and Pritchard (2004) developed the *'destination brand fashion curve'*, to show the various stages of the destination brand life cycle. In general, the brand life cycle depends on the relevance of the destination brand to the customers. Figure 4 shows the development of the brand life cycle as a S-curve, which charts a brand's life from the beginning (birth) to the end (death). Time frames should be seen as elastic and could last from weeks to centuries (Morgan & Pritchard 2004). Morgan and Pritchard (2004, p.68) want managers to see the destination brand fashion curve as "a series of stages in the brand's relationship with its consumers".

At the 'fashionable' stage, destinations are highly dependent on trend setters and opinion formers, as the destination brand is just in the beginning of its development. In the 'famous' phase, the trend setters move on to the next unknown destination and leave the field to those consumers who are loyal and generous. To be able to keep these customers, the destination has to obtain its values; otherwise they will move on to another destination. At this point, the brand slips into the 'familiar' phase, where everyone knows about the destination and it has lost its attraction. If a destination brand reached the stage of familiarity, it is not far from becoming 'fatigued', which means that it is difficult to attract profitable market segments (Morgan & Pritchard 2004). If a decrease of customer interest and brand relevance is recognized, brand managers have to ask why. Identified reasons can then show the need for brand refreshments (Buncle 2009).

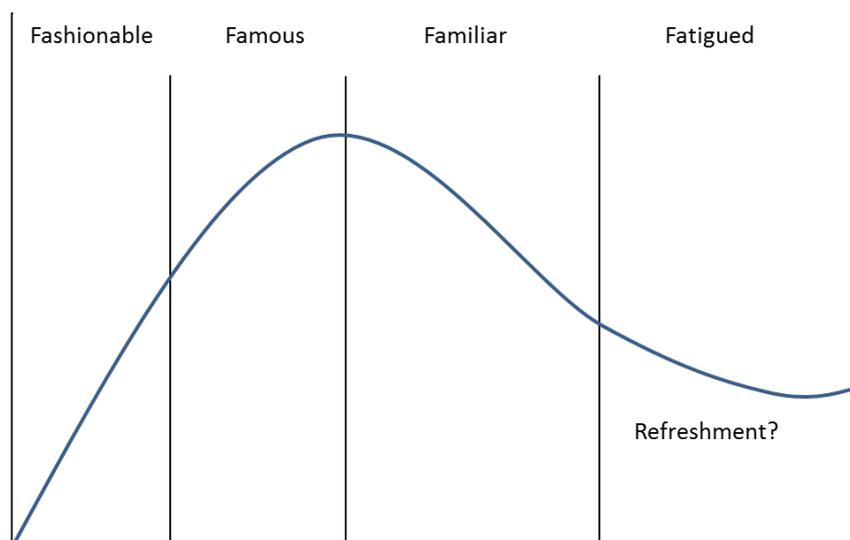


Figure 4: The destination brand fashion curve (Morgan & Pritchard 2004, p.69)

Morgan and Pritchard (2004, p.68) state that “no destination brand can ever remain static”, and therefore brand managers should start to refresh the brand just before the brand hits the ‘familiar’ stage. According to Buncle (2009, p.80) it is time to refresh the brand, “when the brand starts to feel comfortably familiar”, as customers will become uninterested and the brand relevance starts to decline. If not undertaken earlier, the refreshment is definitely necessary at the ‘fatigue’ stage (Buncle 2009).

2.2.3. The Role of Branding Components in the Rebranding Process

In general it can be said that many of the branding components are playing an important role in the rebranding process. The following paragraphs provide a short insight on how destination image and positioning are influencing rebranding.

Given the fact that a destination has developed a brand identity, the resultant destination image can be measured after some time through e.g. tourism statistics or visitor surveys. As discussed before, if the perceived image is negative or unfavourable, a destination can change it either through a complete rebranding or partial refreshment. Hence it shows that destination image plays an important role in destination rebranding and can be seen as one of the main drivers.

Next to destination image, also the positioning process has to be highlighted, as these two concepts are closely related to each other. Through sloppy or completely wrong positioning, the destination identity will not be perceived in the way as destination managers might have wished for. The positioning process is essential for a positive brand image created by the consumers, as visual and verbal elements of a brand stimulate the emotional relationship between the destination and the consumer (Buncle 2009).

2.2.4. Rebranding Case Studies

The concept of rebranding or refreshment sounds nice in theory, but what does this actually mean for tourism destinations? As the main focus of this paper lies on the rebranding process of French Polynesia, the author gives some examples on rebranding to provide a basis of the rebranding practice. Furthermore, this is to show the various reasons or needs for rebranding, which can differ from destinations, cities or island destinations.

Nation Rebranding Example – Spain (Buncle 2009)

In general, destinations do not undertake a complete rebranding, as refreshing the brand is usually more productive and less radical. Still, there are exceptions, of which one was Spain in the 1980s and 1990s, which undertook a complete rebranding on a national level. By the 1980s, Spain held a rather negative image as it has been seen as a cheap and overcrowded beach destination, offering nothing more than sand, sun and mass tourism. In the beginning of the 1980s, Spain decided to undertake a complete rebranding and to place the marketing focus on culture and heritage. Through various (industrial) changes in the 1990s, such as the construction of the Guggenheim Museum in Bilbao in 1997, Spain gained popularity for its rich culture and had a chance to regenerate itself from the negative mass tourism image. A new logo was created, *España – el sol de Miró* - designed by Joan Miró, see figure 5, to reflect the new cultural, contemporary and ‘cool’ image of Spain. At a later stage, different regions of Spain changed their marketing appearance and were introduced under the new logo and brand. Though the different marketing strategies changed over time, such as the introduction of the ‘Smile’ device, the brand core values stayed the same. To sum up, Spain undertook an outstanding rebranding, which concluded not only in retaining the beach customers, but also in attracting new culture seeking tourists, i.e. opening new target markets.



Figure 5: Logo / *España – el sol de Miró* (Turespaña/Segittur 2015)

City Rebranding Example – Dublin (Ireland) (Corcoran 2015)

Next to destinations, also cities can face the problems of inconsistent brand awareness and communication. This case study, which was published by Niall Corcoran in January 2015, shows a very severe problem, with which many other cities might also have to deal with on a constant basis. The main issues were that neither citizens nor consumers knew that

Dublin City BID, which can be seen as the visitors' bureau, stood behind all the events, the website, the congresses etc. and the overall brand awareness was heavily lacking. Due to several reasons, Dublin City BID decided to assign Creative Inc. with the creation of an overall brand identity. Creative Inc. discovered that one of the major issues was the name 'Dublin City BID' as it led to confusion around the organization's actual duties, as well as it had no public recognition. Moreover, there was no brand consistency – no visible brand message – as well as there was no direct link to its sub-brand DublinTown.ie and its activities Dublin Fashion Festival, Dine in Dublin and Dublin at Christmas. After a lot of research, the main goal of the rebranding was identified: Creative Inc. wanted to develop a "more unified brand structure, where the core (the organization) was more aligned to its sub-brands and activities". Hence, the organization was joined under one brand and Dublin City BID was renamed to 'Dublin Town'. Furthermore it received a new slogan 'We are Dublin Town', and two different websites were created: <http://www.dublinton.ie> (consumer focused) and <http://www.wearedublinton.ie/> (business focused). The new name also required a new visual identity, i.e. a new logo. To retain great work, Creative Inc. worked with the existing *Dublin Town* identity and simply highlighted the *IN TOWN* part, which built the foundation for the identity layout. Moreover, a stamp for 'We Are Dublin Town' was developed, see figure 6, which was used for merchandise. The outcome of the rebranding could be measured on its high impact on both the citizens and the consumers. All the activities can now be connected to *Dublin Town*, and the general visibility of the brand throughout the city increased. Also the relationships between *Dublin Town* and its supporting businesses were strengthened through this brand consistency.



Figure 6: Post Stamp / *We Are Dublin Town* (The Place Brand Observer, n.d.)

Island Destination Rebranding Example – Norfolk Island (Prideaux & Watson 2010)

As mentioned before, destination branding is often closely related to a destination's location. Concerning island destinations, this makes the rebranding process a very difficult undertaking as the variety and availability of core characteristics of the destination, for example natural resources, is limited.

Norfolk Island, located in the Pacific Ocean, is a well-known tourism destination for Australian and New Zealand visitors. As many other island destinations, Norfolk Island is also highly dependent on tourism as one of the main source of income. Though the island has a strong natural and cultural heritage, visitor numbers started to decline over the last ten years. As the destination was unable to recognize that its biggest market segment was seniors, the industry did only respond poorly to the needs of this generation. As an example, the accommodation sector did not change according to the needs of the market (seniors), leading to the point where tourism offerings have been unavailable for other market segments, resulting in a decrease in tourist numbers and a loss in revenue. While searching for possible solutions for this situation, the 'Norfolk Island Five year Tourism Strategy 2007/2008 – 2001/2012' determined that if the island wants to regain visitors, it has no alternative but to change. As there was no efficient brand, which could have been refreshed through marketing campaigns or slight changes, there was the need for a completely new brand. The first step was to establish a branding committee, which represented various stakeholders, and which updated the government and community of Norfolk Island on a regular basis. After some excessive research and the identification of the preferred destination image, the island's identity was changed from 'Norfolk Island' to 'The World of Norfolk', which can be seen in figure 7. Furthermore, a complete repositioning of the brand was undertaken, pushing the brand towards a brand image based on experience rather than on geographic location. The overall aim of the rebranding process was to "show that Norfolk is able to provide an escape [...] while highlighting its difference from other destinations in the South Pacific" (Prideaux & Watson 2010, p.34). It was not yet analysed by researchers if the rebranding was successful, as the success is highly dependent on the further development of the island's industry and infrastructure, its willingness to adapt to new market segments and strong associated marketing campaigns, which might result in an increase or at least might stop the decrease of visitor numbers.



Figure 7: The World of Norfolk – Logo (Travel.com.au, n.d.)

2.2.5. Summary of Rebranding Case Studies

This paper gave an overview on three different case studies concerning the rebranding process of tourism destinations, be it a nation, city or island destination. The basic idea behind this was to provide a general idea of the various reasons that could lead to rebranding. Moreover, also the importance of stakeholder management could be identified, especially in the case of Norfolk Islands, where the local community and the tourism industry had to work closely together to achieve the overall goal – increasing tourist arrivals and bed nights. Speaking of the branding process, also the importance of clear visible and verbal elements of a brand is highlighted. Spain realized the need for a comprehensive new logo, which represented the colourful, natural and cultural image of the country. Dublin took this step even a bit further and developed an umbrella brand identity for the city brand and all its linked activities, such as *Dublin at Christmas* or *Dine in Dublin*. Next to the visual elements, another goal was to illustrate the great work of the advised authorities. The awareness of visitors and local communities for DMOs should be raised and improved. Another important part of the case studies was the shift of market segments. Finding the right customer for the right product and being able to market it correctly, was one of the main concerns for both Spain and Norfolk Island. Spain was able to enhance its image from sand, sun, and sex, to culture, nature and individual tourism rather than mass tourism. Norfolk Island, on the other hand, had to accept that their main market segment is seniors, but they still tried to address a younger, fresher population segment.

To sum up, the author chose these three very different case study examples to highlight their similarities as well as their differences. The need for rebranding can be seen in various destinations and should clearly not be underestimated.

3. The Islands of Tahiti

As already mentioned, the aim of this paper is to identify the main reasons for the rebranding of Tahiti. Therefore some general information on Tahiti is given to provide common background knowledge. The first paragraph will only focus on *GIE Tahiti Tourisme*, which functions as the official DMO of French Polynesia, and was the key driver for and during the rebranding.

3.1. GIE Tahiti Tourisme

Founded in December 1992, *GIE Tahiti Tourisme* is an economic interest group (GIE stands for 'groupement d'intérêt économique') and can be seen as the visitors' bureau of French Polynesia. It aims to promote the tourism destination of French Polynesia as well as its tourism products and services at both a local and international level. Furthermore, it is constantly trying to enhance local tourism. To do so, it is closely working with the ministry and the administrative tourism department. Tahiti Tourisme's main focus is to implement development strategies for the tourism industry.

Tahiti Tourisme aims to promote tourism in the country, to welcome and inform visitors, to raise the local community's awareness for tourism, to participate in the development and improvement of the tourism product, and, generally speaking, to implement any actions to facilitate the visitor flow to and within the country.

The organization identified several responsibilities to be able to promote tourism successfully. Examples include the following:

- The organization of all surveys, promotions, and incentive actions aimed to publicizing French Polynesia on the external and internal market.
- The conduction of market research or any studies required for the fulfilment of the purpose of the group, i.e. enhancing French Polynesia as a tourism destination.
- The organization, cooperation or participation in trade fairs, symposia, conferences and any other tourism related event that aims to promote the destination's development.
- Financial support for all promotion and communication activities conducted in partnership with the tourism industry.

Furthermore, the group's focus lies on informing, educating and assisting visitors, as well as organizing all traditional ceremonies during events. Also encouraging the local community in the development of domestic tourism is one of their main tasks. Therefore it is constantly launching tourism and brand awareness campaigns to highlight the benefits of tourism for the country. As the inhabitants of French Polynesia are perceived as a warm and friendly community, Tahiti Tourisme contributes to the development of events that could be of interest for tourists (Tahiti Tourisme 2014).

3.2. French Polynesia – The Islands

French Polynesia is located directly in the heart of the South Pacific, and contains a total of 118 islands, which are spread over five great archipelagos. The three most popular archipelagos are the *Society Islands*, which include Bora Bora, Huahine, Moorea, Raiatea, Taha'a and Tahiti, the *Tuamotu Atolls*, which comprise Fakarava, Manihi, Rangiroa and Tikehau, and finally the *Marquesas*. Nevertheless, French Polynesia consists of two other archipelagos: the *Austral Islands* and the *Gambier Islands*, which are located in the south and southeast of the Society Islands. These two island groupings are not very well known due to their remote location and their pristine nature. The whole extension of the five archipelagos and its comprising islands can be seen in figure 8 (GIE Tahiti Tourisme 2014).

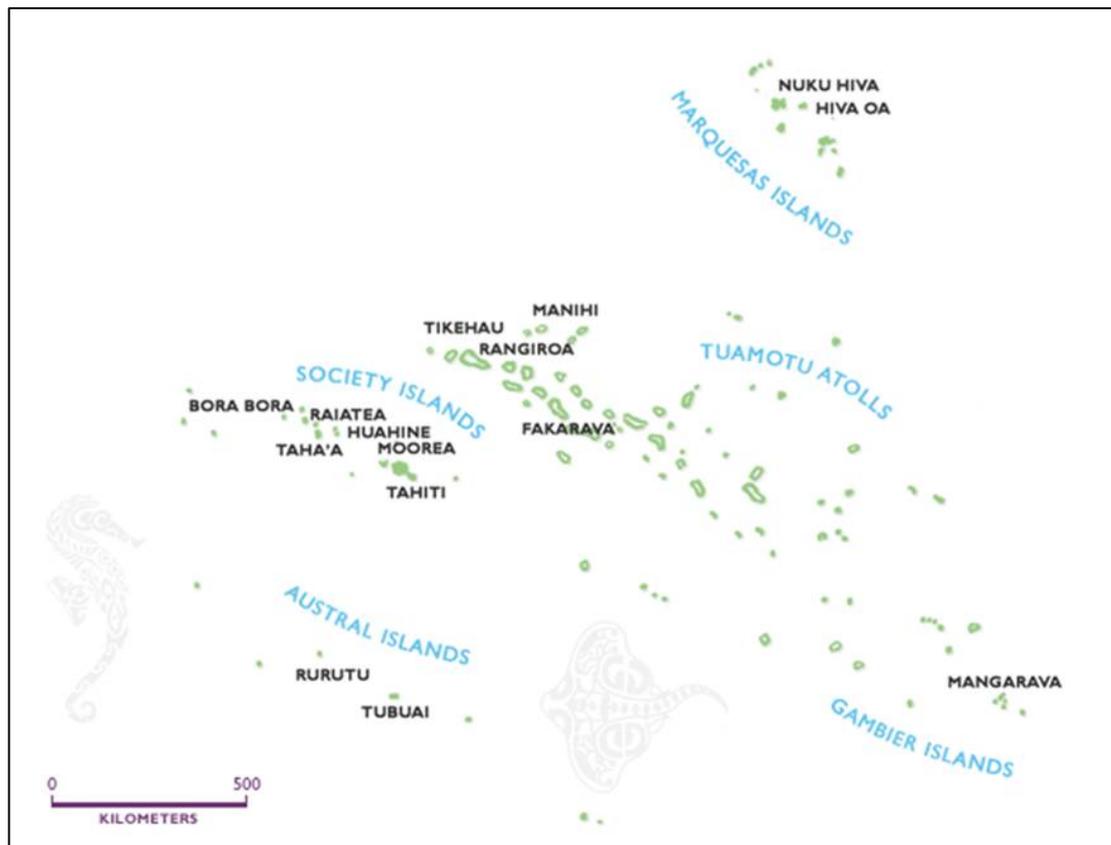


Figure 8: The Islands of Tahiti (Tahiti Tourism 2015)

Furthermore, French Polynesia captures two kinds of islands: high mountain islands, which comprise the Society, Marquesas, Gambier and Austral Islands, and low lying coral islands, i.e. Tuamotu Atolls. Many of these islands are surrounded by coral reefs, making them truly paradisiac (GIE Tahiti Tourisme 2014).

Basic Information:

- Population: In 2013, French Polynesia had a population of 270.212. As Tahiti is the biggest of the islands, it accounts for the biggest part of approximately 245.000 inhabitants (ISPF 2015).
- Time Zone: French Polynesia is 10 hours behind GMT. As an example, this is a 12-hours summertime or 11-hours wintertime difference to Vienna, Austria.
- Climate: With a tropical climate, yearly average temperatures of 26°C, and a maximum number of hours of sunshine of approximately 3.000 hours per year, French Polynesia is the perfect destination to escape winter in Europe.

- Currency: The currency is the CFP (=Cours de Franc Pacifique / French Pacific Franc). The pacific franc is pegged to the euro: 1 EUR = 119,33 CFP (GIE Tahiti Tourisme 2014).

3.3. Accessibility

As French Polynesia lies in the middle of the South Pacific, see figure 9, it can be accessed by many different locations worldwide. Following there are some distances listed: 17.100km from Paris, France; 6.200km from California, USA; 5.000km from Australia and 8.800km from Tokyo, Japan. “Faaa International Airport”, located in Papeete, Tahiti, is used as the main air transfer hub, and runs regular weekly flights to the USA, Japan, France, Australia and New Zealand. An example for such a connection is Los Angeles LAX airport to Papeete in under eight hours, which operates daily and nonstop (GIE Tahiti Tourisme 2014).

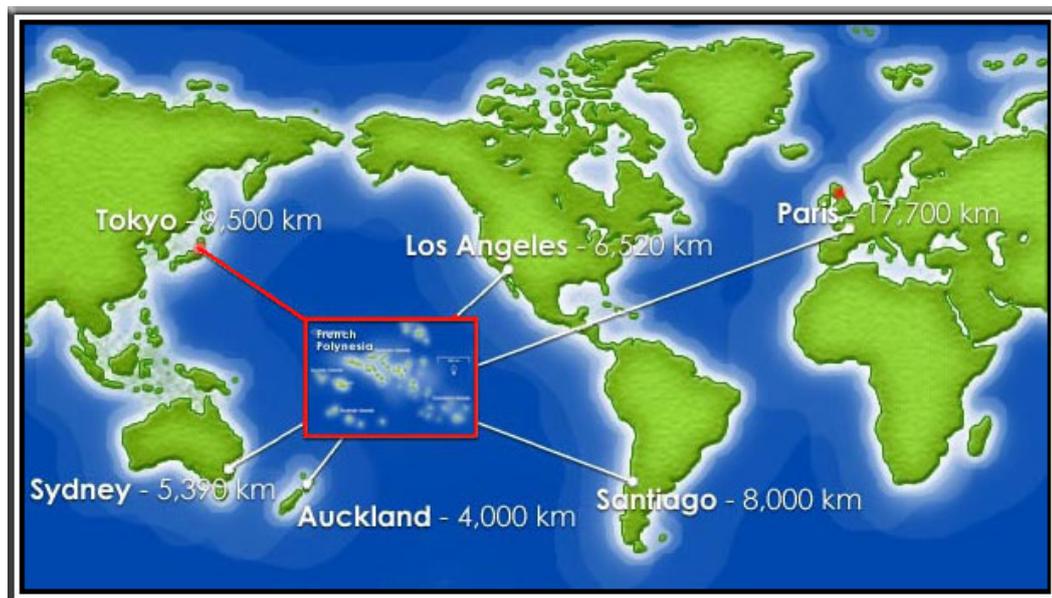


Figure 9: Tahiti's location in the world (Georgeandpaula.com 2015)

3.4. French Polynesia – The Perception of Paradise Islands

When tourists think about French Polynesia, they often think about Tahiti, Moorea and Bora Bora. Especially honeymooners, romantics and ‘escaping’ vacationers value the sandy beaches, the turquoise water and colourful reefs. But also tourists striving for adventures

can find many possibilities to do so, for example while diving or experiencing the high mountains during a trekking tour (Tahiti Tourisme 2015).

But what makes Tahiti and her islands unique? Tahiti Tourisme (2015) identified six competitive factors of French Polynesia:

- Overwater Bungalows: These bungalows are often the first thing tourists think about when they are talking about Tahiti. Tahiti preens itself on offering tourists the unique experience of sleeping above soothing lagoon waters and often also being able of watching fish through glass windows directly from bed.
- People: The rich culture of French Polynesia is seen as a huge competitive advantage. Strong traditions and a lively culture, such as music, dancing and tattoos, combined with the warmth of the Polynesian inhabitants are contributing to a unique moment.
- Polynesian Spas: Moreover, French Polynesia is famous for its luxurious spas, where relaxation in a tropical ambience can be experienced.
- Cruising: travelling by plane is of course only one possibility to visit the different islands. Luxurious cruise ships, or yachts, allow tourists to travel between the different islands, to snorkel at various lagoons and provide an impressive view on the mountains and atolls.
- Snorkelling & Diving: Tourists can easily experience the crystal-clear lagoons or ocean passes during a snorkelling or diving tour. A bonus is definitely the many schools of coloured fish, docile sharks, giant manta rays and coral reefs.
- Honeymoons & Romance: Finally, French Polynesia is perceived as a very romantic holiday destination. The remoteness of many of the islands combined with imposing sunsets, are attracting many romantic seeking tourists every year.

3.5. Tourism Statistics

This paper also takes a look at tourism statistics taken from the *Institut de la statistique de la Polynésie française* (ISPF) website, as they are the statistic office of French Polynesia.

First, the paper will analyse the numbers of tourist arrivals in French Polynesia with a focus on European countries. In addition, the numbers of bed nights will be discussed, and finally,

the length of stay will be taken into account. All detailed statistics and figures can be found in Appendix A.

3.5.1. Tourist Arrivals

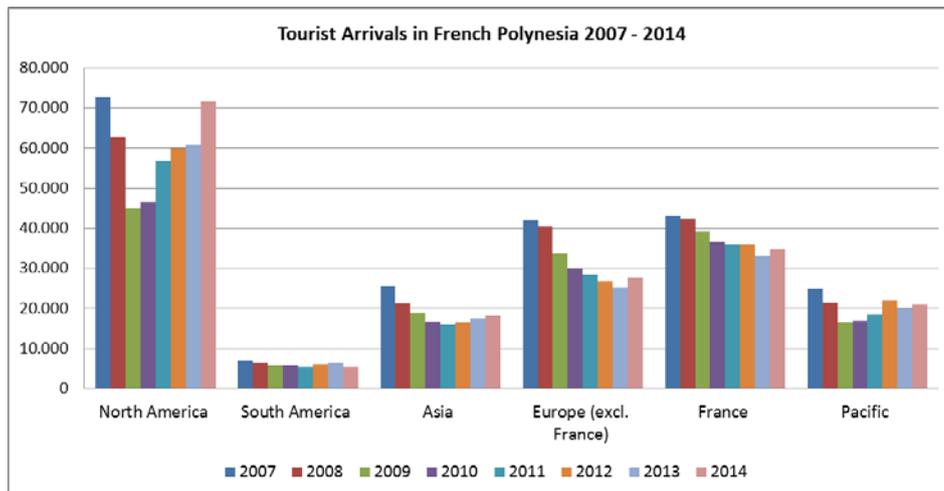


Figure 10: Tourist arrivals in French Polynesia from 2007 to 2014 (ISPF 2015)

Figure 10 displays the numbers of tourist arrivals in French Polynesia from 2007 to 2014. The main source markets are *North America*, with 59,520, *France*, with 37,613, and *Europe* (without France), with 31,745 tourist arrivals on average. Asia and Pacific almost account for the same amount of arrivals, whereas South America only plays a minor part. It can be seen that the financial crisis of 2008/2009 had an influence on the travel behaviour to French Polynesia and is responsible for the decline in tourist arrivals. North America seemed to suffer most from the crisis, but was able to steadily increase its numbers from 2010 onwards. Other than North America, Europe and France did not experience an upward trend. Only in 2014, the arrivals increased by 9,72% (Europe) and 5,89% (France) from 2013.

Taking a closer look at the European countries, it shows that Italy is the biggest source market, with an average of 10,901 tourist arrivals over the last eight years. The United Kingdom, Germany, Switzerland, and Spain are also considered to be important European source markets, followed by Austria. Almost all European countries, excluding Switzerland, faced a steady decrease in arrivals from 2007 to 2012/2013. It is interesting that almost all tourist arrivals strongly increased in 2014. As an example, the UK numbers increased by 48,51%, and Austrian numbers by 28,25% from 2013 to 2014.

In general, it can be seen from these statistics that the decreasing numbers of tourist arrivals might have been a reason for the rebranding. Moreover, North America, France and Italy can be identified as the main source markets.

3.5.2. Tourism Bed-nights

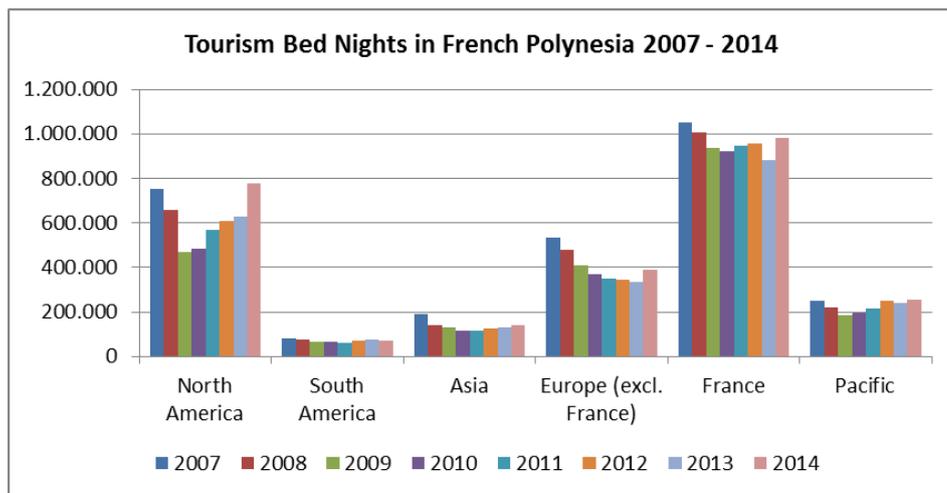


Figure 11: Tourism bed-nights in French Polynesia from 2007 to 2014 (ISPF 2015)

Next to the tourist arrivals, also the tourism bed-nights can support the theory of a general decrease in tourist numbers in French Polynesia. Figure 11 shows the tourism bed-nights from 2007 to 2014 for worldwide source markets. Again, the financial crisis in 2008/2009 had an impact on the numbers. As an example, bed-nights decreased from 2008 to 2009 by 29,35% for North America, and by 15,17% for Europe. Though there seemed to be a general decreasing trend for Europe and France over the last years, there was a steady growth in the numbers of North America, Asia and the Pacific region, and all source markets were able to increase their volume by 2014.

Taking a closer look at the European source markets, there cannot be a general in- or decrease in bed-nights identified. Some markets faced an enormous down-phase, such as Spain or Italy. Italy had a strong and constant decline over the last seven years, with an overall decrease by 42,21% from 2007 to 2014. On the other hand, other big source markets, such as Switzerland, were able to increase their numbers after the financial crisis. The United Kingdom experienced heavy declines and growths, whereas Austria had a steady but moderate decrease in bed-nights.

3.5.3. Length of Stay

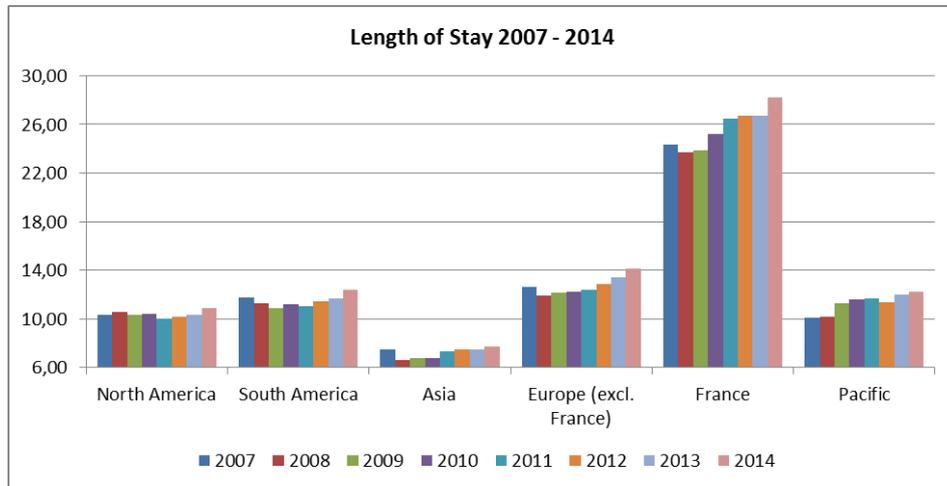


Figure 12: Length of stay from 2007 to 2014 for worldwide source markets (ISPF 2015)

As many countries faced a strong in- and decrease in tourist arrivals and bed-night numbers, the author decided to also look at the change of the length of stay. In short, the average length of stay of French visitors increased from 24,34 days in 2007 to 28,24 days in 2014, which equals an increase of 16,02%. Actually, all source markets experienced an increase in the length of stay, which can be seen in figure 12. Figure 13 shows the steady increase of the average length of stay from 13,28 days in 2007 to 14,63 days 2014 of all countries, which is an increase of 7,96%.

Concerning European countries, most markets were able to increase their length of stay after the financial crisis. As an example, Austria increased its numbers by 12,36% from 2008 to 2014, and Belgium, who is currently having the highest length of stay with 21,09 days in 2014, experienced a growth of 11,27% from 2007 to 2014.

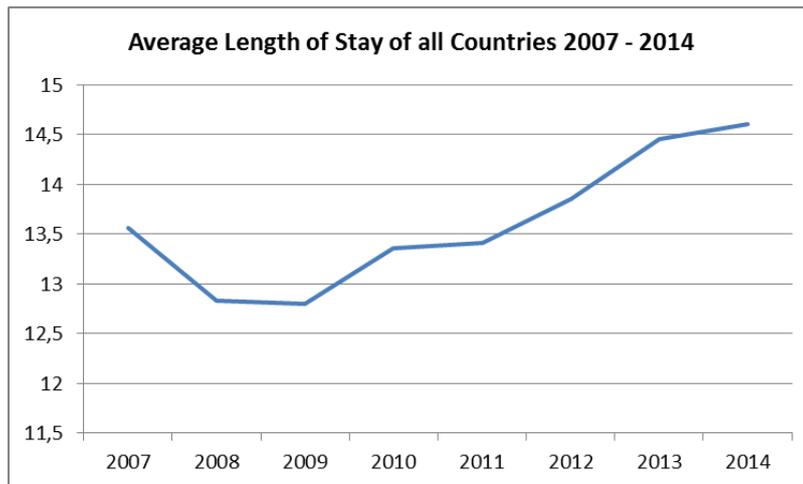


Figure 13: Average length of stay of all countries (ISPF 2015)

3.5.4. Summary on Tourism Statistics

Tourism statistics are generally considered to be a good indicator for a destination's performance. Looking at all the information given it can be concluded that not only tourist arrivals, but also tourism bed-nights steadily declined from 2007 to 2014. Even major source markets, such as North America, France, Italy, the United Kingdom, or Switzerland, experienced a strong decreasing trend over the last years. One reason for the overall decrease in tourism numbers was the economic crisis in 2008/2009, from which many markets strongly suffered. Nevertheless, the average length of stay constantly increased from 2007 to 2014 and is currently at 14,63 days. Though tourists increased their vacation time, the overall tourism numbers dropped to an alarming level. Through this data analysis the general assumption can be made that French Polynesia lost its popularity and attraction to potential visitors.

4. Methodology

Tahiti recently performed a global rebranding. Therefore there lies the question at the heart of the thesis what the rebranding process means for Tahiti. To link the branding theory to the praxis, the paper focuses on a case study on the islands of Tahiti, which is the main research method applied. According to Gerring (2004, p. 341), a case study is "an intensive study of a single unit for the purpose of understanding a larger class of (similar)

units". Furthermore, a case study knows two research strategies: 'exploratory' and 'confirmatory'. In general, case studies face an advantage when focusing on exploratory research, which means that the conducted research is or might be innovative and pioneering (Gerring 2004). The exploratory approach of this paper will focus on two structured interviews with tourism experts, who have been entrusted with the rebranding of Tahiti at the German speaking market and the United Kingdom. This shall support the concept of the case study research.

On the other hand, a combination of the confirmatory and descriptive approach of the case study will make use of both SWOT analyses and document analysis. The first SWOT analysis shall identify the main problems Tahiti was struggling with before the rebranding and therefore it shall serve as a transition to the reason why a rebranding was necessary. The second SWOT analysis shall then highlight the changes and differences in opportunities that emerged from the rebranding process. The following paragraphs define the concept of case studies, SWOT analyses and structured interviews in more detail.

4.1. The Case Study

The principle idea of a case study is that only a particular incident is analysed in detail and from many angles. Stake (2005, p.443, cited in Thomas 2011, p.9) says that a "case study is not a methodological choice but a choice of what is to be studied. By whatever methods we choose to study *the case*". The main focus of the research lies on the case itself, rather than on the methods used. Therefore, sampling research techniques, such as surveys, can be ignored to some extent, but the choice of the case has to be justified. The outcomes or findings of a case study cannot be used for common generalization, as the information is only relevant to the particular case. The main aim of a case study is to find relationships between the data and processes, as well as to create an overall picture that offers deep analytical insights (Thomas 2011). The paper tries to find the key drivers for the rebranding of French Polynesia, as well as to link the reasons to the applied strategies. Though there are many Pacific islands, the outcome of this research cannot be generalized and can only be compared to other cases to some extent.

4.2. SWOT Analysis

A SWOT Analysis is a useful tool to identify the overall environment of a business, as well as it provides an overview on problems faced and objectives for the coming year. It is

generally used to determine the current market situation, often in relation with the creation of new marketing plans or product launches (Holloway 2004). According to Holloway (2004, p.30), a SWOT analysis is “the identification of *strengths* and *weaknesses* in the business, the *opportunities* presented by the trading environment and any *threats* faced by the company”. Regarding this paper, the SWOT analysis shall identify the main problems Tahiti was struggling with before the rebranding and therefore it shall serve as a transition to the reason why a rebranding was necessary.

4.3. Interviews

Next to the SWOT analysis, structured interviews will be conducted. This shall provide a deeper insight into the reasons for the rebranding, as well as to analyse if all the organizations dealt with the rebranding in the same way. The following paragraph gives a short overview on the concept of structured interviews.

Interviews provide the chance to study subjective viewpoints and allow a deeper insight on the experimental finding or case analysed. According to Flick (2006, p.155), (semi-) structured interviews are desired as “the interviewees have a complex stock of knowledge about the topic under study”, which allows a comprehensive subjective interpretation. Open questions are often used as tools, but also hypotheses-directed questions are asked. The main goal of interviews is to contribute to the existing knowledge about a topic through interpreting answers given by interviewees (Flick 2006). This paper makes use of a mixture between *structured interviews*, meaning that the questions asked are provided to the interviewee beforehand, *focused interviews*, using a certain stimulus/event as the basis for the interview, i.e. the rebranding, and *expert interviews*. According to Bogner and Menz (2009, cited in Flick 2006, p.155) expert interviews are used to support the analysis of a new research field as well as to generate hypotheses. Moreover, they are a useful tool to collect insights as the chosen experts are known for the experience and knowledge in the field of study (Flick 2006).

The author chose to send the questionnaire to the interviewees by e-mail as no office is located nearby which would allow face-to-face interviews. The questionnaire consists of nine questions solely regarding the rebranding process of Tahiti, see Appendices E and D. The first part of the questionnaire focuses on the reasons, the desired goals and the role of competition regarding the rebranding. The second part tries to identify the strategies applied as well as the brand components and their meaning to the customers. The final part

deals with the difficulties faced during the process and the future strategies to measure either success or failure.

4.3.1. The Sample

The author decided to conduct structured interviews with a limited sample size of two interview partners to enable an in-depth analysis of the research questions. The following table 1 indicates the full name and the location of the head office and of the two offices chosen. Moreover, the head office of Tahiti Tourisme supported this research by providing the branding guide lines, which supported the outcome of the interviews.

Name of the company:	Representation for these countries:	Situated at:
<i>GIE Tahiti Tourisme</i>	Head Office	Fare Manihini, front de mer, Boulevard Pomare, Papeete B.P. 65 - 98713 Papeete - Tahiti
<i>Tahiti Tourisme Germany</i> c/o Eyes2market GmbH	Germany, Austria, Switzerland	Fasanenstr. 2 / 25462 Rellingen - Germany
<i>Tahiti Tourisme UK</i>	United Kingdom	Colechurch House, 1 London Bridge Walk / London, SE1 2SX - United Kingdom

Table 1: Considered Tahiti Tourisme offices worldwide for interview partners

As there was no research done on this specific topic so far, the perspectives of the head office and the representations are equally important. As discussed in the literature review, all stakeholders of the brand, in this case mainly the representations have to provide the same brand identity to raise awareness for the new brand.

After thorough data collection, the author tried to answer the research question and all related questions as detailed as possible. The results will be discussed in the following chapter.

5. Findings

5.1. SWOT Analyses

As mentioned before, a SWOT analysis is a useful tool to identify the overall environment of a business (Holloway 2004), in this case of the islands of Tahiti. In this chapter, the author identified the strengths, weaknesses, opportunities and threats of French Polynesia before and after the rebranding process. The findings mentioned were developed by the author based on personal experiences and the support of Tahiti Tourisme. Next to the decreasing visitor statistics which were analysed in chapter 3.5., the first SWOT analysis can be seen as another indicator why the rebranding was necessary. The second SWOT analysis shall then highlight the differences and changes the rebranding process provided.

5.1.1. SWOT Analysis before the Rebranding

Before the rebranding was undertaken, the destination's main problem was to compete on the market and to highlight its unique core brand elements. In the following paragraph and in figure 14, the author summarized the most important elements of the SWOT analysis.

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Island names are well-known (Tahiti, Bora Bora, Moorea) – Brand Recognition • Geographic Location (South Pacific) • Rich Culture (Authenticity, People) • Honeymoon/Romance Destination • Island Uniqueness (Overwater Bungalows, Nature, Tahitian Cultured Pearls, Lagoons) • Cruise Destination 	<ul style="list-style-type: none"> • Offering mainly “one-dimensional” products: Family Vacation, Spa Vacation, Golf Vacation, Wedding Destination... • Return Guest-Ratio: it is a “once-in-a-lifetime” destination • Communications: French is the official language • Transportation: “Point-to-Point” transportation options are limited • “Tahiti” comprises many islands

OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Marketing and Promotion: creation of new distribution channel networks • Cruise: development of long term contracts • Infra- and Superstructure: <ul style="list-style-type: none"> ○ improving Papeete’s area structure ○ Partnerships with hotels 	<ul style="list-style-type: none"> • Competition: <ul style="list-style-type: none"> ○ competitive island destinations offering the same product

Figure 14: SWOT Analysis before rebranding

Two of the most important strengths of French Polynesia are its location in the South Pacific Ocean and the fact that the island names are globally very well known. Especially Tahiti, Bora Bora and Moorea are identified as the most popular islands and are usually the ones that are excessively marketed. Whenever a marketing concept was launched, the possibility was high that one of these three islands was displayed or described. Moreover, French Polynesia is known to be one of the ‘dream’ honeymoon destinations, offering sun, endless beaches and crystal clear water. Picturing Tahiti, the perfect island scenery and overwater bungalows must not be missing. Moreover, French Polynesia is rich in culture and authenticity. The inhabitants of Tahiti and her islands are considered to be very friendly and outgoing, generous and warm-hearted.

Next to its various strengths, French Polynesia suffers from some severe weaknesses. One of the biggest problems is that the islands are mainly offering “one-dimensional” products in matters of accommodation. Visitors have a variety of accommodation facilities to choose from, but the majority of these are concentrating on a specific segment, such as families, relaxation, golf or weddings. This makes it difficult to find a property that comprises more than one of the mentioned niches. Furthermore, French Polynesia is considered to be a “once-in-a-lifetime” destination, meaning that loyal or returning visitors are very rare. This increases the marketing costs as the destination constantly has to target new consumers. Another weakness concerns the issue of communication. Though English is one of the most common languages spoken at tourism destinations, French is the official language. Visitors who are not speaking French are experiencing communication problems when they are

leaving the resorts and the main islands, such as Tahiti or Bora Bora, as the majority of the population is not speaking English. Another main weakness is concerning transportation. Compared to other destinations, “point-to-point” transportation is not as easy due to the fact that the islands are spread over a great distance.

Although French Polynesia’s strengths and weaknesses can be discussed in detail, its opportunities and threats can be easily summarized. The most important opportunity is the development of both infra- and superstructure, such as the improvement of Papeete’s airport, roads etc. Regarding the superstructure, French Polynesia could develop partnerships with local hotels to reduce the one-dimensional offerings to enhance visitor experience. On the other hand, French Polynesia is under constant threat of existing and potential competition. Other island destinations, such as the Seychelles or the Maldives, are offering the same product: sea, sun, lagoons and overwater bungalows.

To sum up, French Polynesia has much to offer, but how do they differentiate from their competitors? Through the development of this SWOT analysis it is clear that the destination has to change something to be able to retain its position on the market place. Many of the listed strengths can also be seen as weaknesses, for example that only three of the 118 islands are widely recognized by consumers, and are therefore not able to transfer the destination’s brand identity. Also the presence of constant competition pushed the destination towards a new brand identity and positioning.

5.1.2. SWOT Analysis after the Rebranding

As the rebranding process was undertaken only a year ago, the following SWOT analysis, see figure 15, is based on assumptions as well as on goals and wishes of the destination.

The main goal of the rebranding was to highlight the core elements and strengths of the destination, such as its authenticity and pristine nature. Also its rich culture and diversity of offer should be highlighted. Tahiti and her islands shall be perceived as a destination that has far more to offer than just the superficial cliché image of sun, beach, palm trees and overwater bungalows. Another strength is the high media coverage that resulted from the rebranding. Both Tahiti Tourisme and FutureBrand, the branding agency that supported the development of the new brand, released official press statements concerning the rebranding process as well as the benefits the destination will experience through it. Released on 25 June 2014 in Melbourne, Australia, FutureBrand states that “the rebrand [...] underlines how the Islands of Tahiti are one of the few places in the world that combine an authentic living culture with striking, untouched natural beauty and sophisticated

luxury”. The full statement and the official press release of Tahiti Tourisme can be found in Appendix B.

Though the islands’ location in the South Pacific is a strong asset, it is a weakness likewise. Papeete’s airport is indeed internationally very well connected, but the distance and the flight connections are considered to be a major weakness. Visitors often do not want to travel such long distances to get to their holiday destination. Moreover, French Polynesia is still perceived as a very expensive destination which prevents many potential consumers from visiting.

Nevertheless, the islands are facing new opportunities after the rebranding process. The most important point is the attraction of new customers and a new target group, the ‘discerning explorer’ in specific. The following chapters will discuss this in more detail. Although French Polynesia can build its marketing strategies on the continuous demand for long haul destinations and luxury travel, one threat remains: competition. As mentioned before, the islands had to differentiate their destination from their competitors, which they did through the rebranding. Still, the growing popularity of their existing competitors and the emergence of new, unknown competitive destinations, such as Myanmar, are a constant threat and have to be managed closely.

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Positive brand image • High media coverage • Authenticity • Pristine nature • Culture • Diversity of offer 	<ul style="list-style-type: none"> • Distance / Flight connections • Expensive destination • Superficial cliché image
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Attract new (types of) customers due to rebranding – the ‘discerning explorer’ • Continuous demand for long haul destinations 	<ul style="list-style-type: none"> • Competition: <ul style="list-style-type: none"> ○ Growing popularity of competitors, such as Fiji or Cook Islands ○ Undiscovered destinations like

<ul style="list-style-type: none"> • Continuous boom of luxury travel 	<p style="text-align: center;">Myanmar</p> <ul style="list-style-type: none"> • Euro crisis hitting economies • Rising oil prices could lead to more expensive flights
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Figure 15: SWOT analysis after rebranding

Having analysed the two SWOT analyses, it clearly shows that some of the strengths, weaknesses and opportunities changed. Before the rebranding, the destination focused more on the quantity of visitors rather than attracting qualitative ones. The introduction of the ‘discerning explorer’ took place during the rebranding and became a strong opportunity. Furthermore, the focus lied on ‘excessive’ marketing of the islands, mainly Bora Bora, Tahiti and Moorea, which resulted in an incorrect picture in the mind of the consumers showing beach, sun and overwater bungalows. After the rebranding, the attention lies on promoting a pristine nature combined with a diversity of leisure activities. Moreover, also the fact that French Polynesia comprises 118 islands is highlighted and deleted from the previous weakness list. Regarding the destination’s threats it shows that they did not change. Competition is and will stay one of the biggest threats Tahiti has to face.

To sum up, both analyses provide a good overview on the change in offers, the opportunities that resulted, and how the rebranding process changed the focus and approach of Tahiti Tourisme. Though these analyses were developed with the support of the Tahiti Tourisme representations and are useful tools for gaining basic background knowledge, the following chapter will analyse the rebranding process in more detail.

5.2. Interview Discussion

This chapter analyses the results of two interviews conducted with the representations of Tahiti Tourisme in Germany and the United Kingdom. As the head office of Tahiti Tourisme was not able to contribute to this study, so-called brand guidelines were used instead of a personal statement. These brand guidelines were sent out by the head office to all the representations and answer possible questions concerning the rebranding process. Due to reasons of confidentiality, the author is not permitted to publish the guidelines. The author decided to break down the questions and information retrieved from the guidelines to

three subcategories dealing with (i) the background and reasons for the rebranding, (ii) the main rebranding strategies applied, and (iii) the aspired long- and short-term goals and measurement of the rebranding impact.

5.2.1. Reasons for the Rebranding

Starting with the reasons for the rebranding process, another point has to be mentioned first. Tahiti Tourisme has neither run a refreshment of the brand identity nor a complete rebranding in over 10 years. Besides some new approaches to advertising and the introduction of some new taglines, the destination has stuck to its branding concept. One reason for this might have been the fact that a global rebranding is a highly complex undertaking and demands a lot of time and financial resources. However, Tahiti Tourisme decided to proceed the rebranding at a global level to mark “a new, confident and collaborative approach to the marketing initiatives of the destination”.

Asking the representations, the following paragraph summarizes the main reasons for the rebranding mentioned. To one extend, the destination had to prepare for the future through investing in long-term strategies which build opportunities for the people of the nation. As the old brand did not reflect the core messaging of the brand anymore, that Tahiti is a luxurious, high-class and adventurous destination, a new branding concept was required. The picture of Tahiti was outdated and a “bit too low market”, meaning that it attracted the wrong type of consumer. Therefore, the destination had to be positioned away from the typical beach destination image, which displays overwater bungalows and pristine nature, towards its core attractions, such as the high mountains and various leisure activities. These attractions should then be promoted well to drive tourism and to create economic opportunities through further investments and trade. Another important point was to align the brand messaging and identity across all markets to create unity, consistency and efficiencies. As competition is a constant threat, which has also been discussed in the SWOT analysis chapter, consistency of the brand identity is crucial. The interviewees identified several destinations as current competitors to French Polynesia: Cook Islands, Fiji, Maldives, Mauritius, Seychelles, and Thailand. Table 2 gives an overview on the competitors identified in the marketing plan of 2015. The numbers given are visitors for the period defined. It shows that all destinations have suffered from a decrease in visitor numbers from 2009 to 2014. In the first period from 2014 (January to June), Tahiti was able to increase its numbers by 75 percent compared to the previous year. Though some competitors, such as the Cook Islands or the Seychelles experienced a decrease in the

beginning of 2014, it is likely that they will balance or increase their numbers by the end of the year.

	2009	2010	2011	2012	2013	2014 (Jan-Jun)
Cook Islands	5,898	3,998 (-32%)	3,474 (-13%)	2,815 (-18%)	2,959 (5%)	1,527 (-4.6%)
Fiji	26,213	23,813 (-9%)	24,054 (1%)	17,076 (-29%)	17,209 (1%)	8,611 (1%)
Maldives	105,950	114,158 (8%)	104,508 (-8%)	91,776 (-12%)	85,869 (-6%)	42,255 (4%)
Mauritius	101,996	97,548 (-4%)	88,182 (-9%)	87,648 (-1%)	98,017 (12%)	47,142 (11%)
Seychelles	11,292	12,322 (9%)	13,291 (8%)	11,200 (-16%)	12,493 (11%)	5,434 (-5%)
Tahiti	3,482	2,840 (-22%)	2,671 (-6%)	2,617 (-2%)	3,255 (+20%)	2,337 (+75%)
Thailand	841,425	810,727 (-4%)	844,972 (4%)	873,053 (3%)	900,502 (4%)	467,293 (6%)

Table 2: Tahiti's main competitors 2009 – 2014 (Tahiti Tourisme 2015)

To sum up, the new brand should “convey sophistication, elegance and heritage”, as well as it should focus on the unique aspects and qualities of the destination which are promoted consistently on a global level to stay competitive on the market.

5.2.2. Rebranding Strategies

Now that the reasons for the rebranding have been defined, the question was: how was the new brand created? According to the brand guidelines, Tahiti Tourisme worked closely with FutureBrand to develop a strategic positioning and a visual identity. FutureBrand is a leading international brand consultancy with a wealth of experience in country branding, located in Australia. During this process, the core values and activities of the destination were defined. The question of interest was: what makes Tahiti special or different compared to other destinations?

Though the interviewees did not present a strategic rebranding approach, the author developed the following rebranding process design based on the information provided.

- Step 1: as mentioned, *define core values and activities.*
- Step 2: *identify a new target group.*

In cooperation with national partners, Tahiti Tourisme decided that they want a “new” type of consumer: the ‘discerning explorer’. The discerning explorer is different to the usual

beach destination visitor. He strives for both adventures and relaxation provided on a luxurious level. Intense research was undertaken to find the best way to address the new target group.

- *Step 3: the brand launch.*

This procedure was conducted differently by the representations. In one case, a trade and media-only event was held to coincide with the global brand launch in summer 2014. Key partners were invited to this special event, providing information about the new brand. In another case, interviews were given to the trade press to inform the travel community about the new brand. Though these two ways differed massively in terms of time and money spent, the important point is that the launch was announced in all countries simultaneously.

- *Step 4: trade communication.*

To inform the travel and trade press as well as tour operators, travel agencies and other partners about the new brand, e-newsletters were sent out comprising all necessary information.

- *Step 5: immediate use of brand materials in all communication.*

This is considered to be the most crucial step during the rebranding process. The correct and immediate use of the new logo, images, brochures, banners etc. is creating brand awareness and consistency. Moreover, the trade fair appearance was improved, as well as all the websites of Tahiti Tourisme have been changed. FutureBrand and Tahiti Tourisme decided to not only change their logo, but also to change their whole visual appearance. This means that they introduced a new line of photographs which have to be used by the representations, the media and press whenever the destination is promoted. Likewise, pictures representing the 'old' and unwished image of Tahiti have been removed from the database. The following paragraphs provide examples on the change of Tahiti's brand identity.

In the beginning, Tahiti Tourisme and FutureBrand developed a new visual identity for the brand. Based on the beauty and warmth of the destination, the visual design represents

patterns and colours found in local plants and blossoms. Figures 16 and 17 are extracts of the brand press map released by Tahiti Tourisme in 2014. Both images reflect how nature and people have been used as an inspiration to create the new brand visuals.

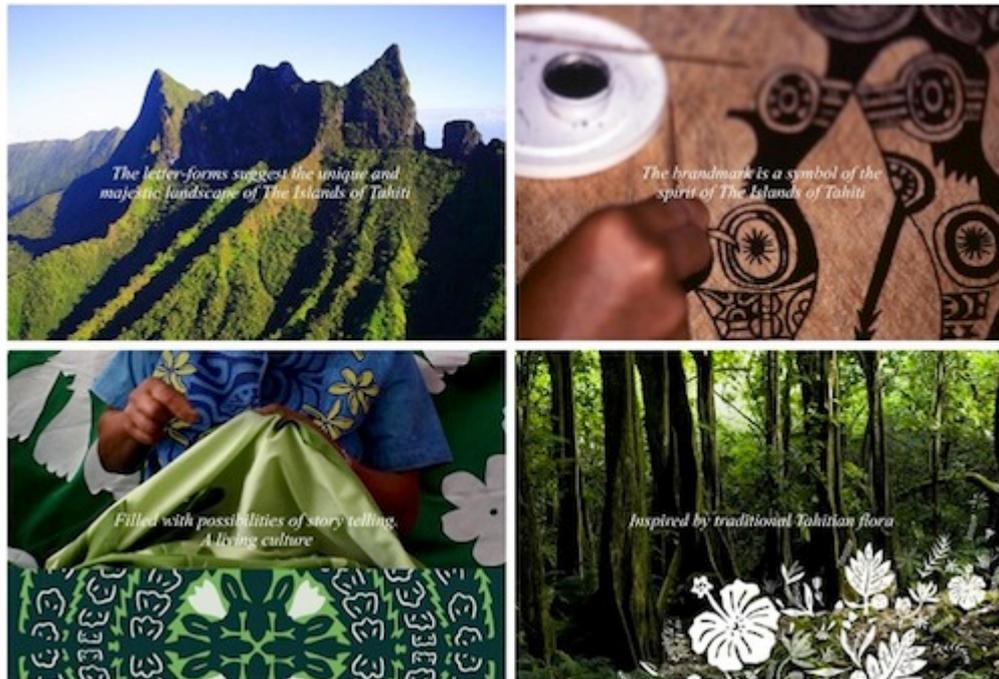


Figure 16: Nature as inspiration for brand visuals (Tahiti Tourisme 2014)



Figure 17: New colour scheme of Tahiti (Tahiti Tourisme 2014)

After the inspiration and new colour scheme was found, Tahiti Tourisme decided that they are in the need for two visual identities: one for the destination and one for the corporate entity of Tahiti Tourisme. Figure 18 shows how the new destination logo looks like. The image on the left side displays the clean logo as such, whereas the right image shows how the logo will be visualized for e.g. trade appearance. It has to be mentioned that though there existed no clear destination logo previous to the rebranding, the destination name changed from “Tahiti and her Islands” to “The Islands of Tahiti”. This name is adjusted according to the markets’ languages, for example to “Tahiti et ses Îles” in French speaking countries.

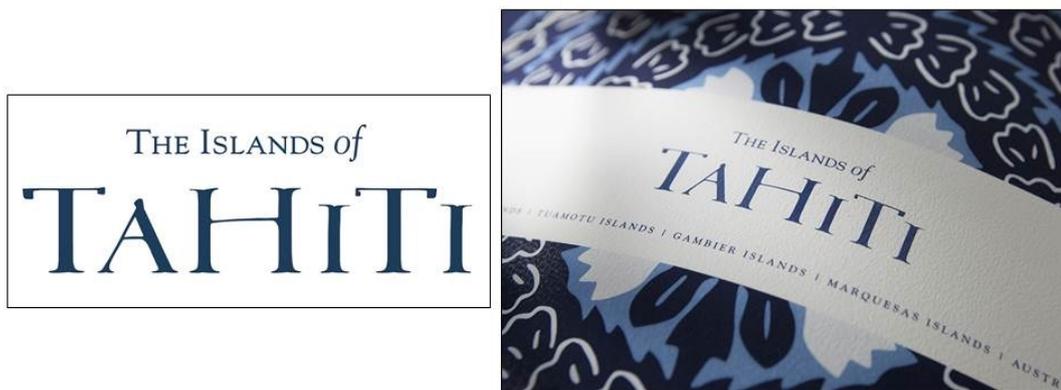


Figure 18: New destination logo (Tahiti Tourisme 2014)

The other visual identity shall represent the global unity of Tahiti Tourisme head office and its representations worldwide. The letters are drawn by hand and are either midnight blue or black to represent the deep of the ocean and the shadows of Tahitian tattoos. This logo was created to serve a strong symbol that differentiates French Polynesia from its competitors. Figure 19 shows how the logo looked like before and after the rebranding process. Clearly it shows the massive improvement of the visual identity towards a more mysterious attitude of the brand.



Figure 19: Old (left side) and new (right side) logo for Tahiti Tourisme (Tahiti Tourisme 2014)

Moreover, the new identity is not only displayed in the logos, but also in the type of photographs used to promote the destination. Timeless beauty, culture and elegance are represented in the new picture line introduced by FutureBrand. The photographs shall encourage proofing the beauty that lies underneath the perfect, picture-postcard like appearance of the destination. Figure 20 shows an example of how French Polynesia was displayed before the rebranding, mainly focusing on the beach, the ocean and overwater bungalows. In contrast, figure 21 displays how the destination is promoted after the rebranding process, focusing on a more pristine, adventurous and 'wild' messaging.



Figure 20: Example of how Tahiti was promoted before the rebranding (R. Sahuquet n.d.)



Figure 21: Example of how Tahiti is promoted after the rebranding (R. Sahuquet n.d.)

The author decided to provide only one example of how the destination was promoted before and after the rebranding. Other examples of photographs used after the rebranding can be found in Appendix C.

- *Step 6: Communication.*

A new communication strategy will be applied to address Business-to-Business (B2B) and Business-to-Consumer (B2C) clients. This strategy is currently developed by a communication agency in the US. Neither was there further information provided on the release day of this strategy, nor on its focus.

- *Step 7: Trade workshop.*

In fall 2014, the interviewees conducted trade workshops to “capitalize on the momentum created by the brand launch”. During these workshops, travel agents were trained about the new brand, its components and the new strategy applied.

After these seven main rebranding steps have been identified, the main question was how much time the transition will require. As rebranding is a very complex process which involves many different actions, it is hard to specify a time horizon. The head office stated that the brand change will take place over approximately six months and shall be finished after one year the latest. Moreover, through this seven step model it can be assumed that

many difficulties occur during the rebranding process. According to the interviewees, one of the main problems was to coordinate all markets' different requirements for the brand. Addressing the own market with the guidelines and strategies provided by the head office was perceived as difficult. Since taglines or images had to be changed according to the specific market, the challenge was to follow the global strategy. Another problem was to change consumers' perceptions. The interviewees stated that bringing the new preferred image to the minds of the consumers through changing their existing attitudes and associations with the old brand is one of the biggest difficulties they are currently facing. Nevertheless, one interviewee mentioned that most problems are handled directly by the head office, which leaves only a few challenges to deal with.

5.2.3. Long- and Short-term Goals and Measurement

After defining what the main reasons, drivers, and strategies were, the author decided to ask for both long- and short-term goals of the rebranding. The goals will partially have already been covered in the reasoning part of this thesis. Nevertheless, the author chose to highlight them again in this section to underline their importance. If an organization is not a hundred percent sure about the main goals they would like to achieve through the rebranding process, they might face a severe loss of time and money, and, in the worst case, of brand loyalty.

Through the rebranding, Tahiti Tourisme wants to indicate a new start for the destination. Increasing brand recognition and awareness among trade was defined as a short-term goal. It is important to create excitement and to raise awareness among trade to build a stable basis for promotion. One interviewee mentioned that they try to "streamline the destination image among all markets and to inject some momentum to the brand".

Though brand awareness was extensively mentioned to be a short-term goal, it is also perceived to be a long-term objective. Raising brand awareness among consumers and to reposition the destination in their minds is crucial for the rebranding success. The main aim is to reposition the brand to target a more qualified audience, the 'discerning explorer', and to promote Tahiti as a unique destination that combines nature, culture and people, with island diversity and sustainability.

Finally, there came up the question on how to measure the impact of the rebranding process. The interviewees stated that one of the best indicators for success will be the increasing visitor numbers to Tahiti. Through an increase can be assumed that consumers

understood the new message correctly and were therefore attracted to the destination. One interviewee highlighted that they measure the impact through their daily work. They talk to the travel trade and ask for feedback. So far, the rebranding has been eagerly supported. Though feedback by the travel community can be measured, there is no possibility to ask the consumers due to a missing end consumer database. Nevertheless, the impact and results shall be measured continuously through questionnaires or similar. The interviewees stated that the head office will conduct most of this and they will probably start within a year for initial evaluation.

6. Conclusion

The aim of this thesis was to identify the reasons for and the impacts of the rebranding of the islands of Tahiti. To develop a basis of common background knowledge, the literature review first defined what destination branding is, analysed its components and highlighted the importance of stakeholder management for branding success. In general, destination branding is a holistic combination of destination identity, positioning and image, preferably leading to destination loyalty. Destination loyalty can be seen as the overall aim of branding a destination as returning customers are considered being a stable source of income and reduce a destination's marketing costs (EURIB 2009a).

Furthermore, the concepts of and reasons for rebranding and refreshment were discussed, followed by rebranding case studies on destinations, cities and island destinations. Next, a general introduction of French Polynesia was given. In this chapter, the main functions of GIE Tahiti Tourisme, the composition of the 118 islands, as well as the main visitor statistics have been specified.

Finally, the findings were based on interviews conducted with two representations of Tahiti Tourisme located in Germany and the United Kingdom, as well as on brand guidelines provided by the head office and on SWOT analyses developed by the author with support of Tahiti Tourisme Germany.

Rebranding is a highly complex undertaking that requires an enormous amount of time and financial resources. Nevertheless and partly forced by decreasing visitor numbers, an undesirably target market, wrong customers' perception, and the need for a new destination image, Tahiti Tourisme decided to undertake a complete rebranding in 2014.

This process required intense stakeholder management to guarantee global awareness and consistency of the new brand identity and its components. Regarding the brand components, such as visual and verbal elements, Tahiti Tourisme and FutureBrand created two new verbal identities, one for the destination, “*The Islands of Tahiti*”, and one for the corporate entity, “*Tahiti Tourisme*”. Also the visual appearance has changed from a mainstream, holiday destination presentation towards a new, mystical and adventurous design coloured in midnight blue and black. To present the new identity consistently on all markets, a new line of photographs has been introduced, which has to be used by all representations for any kind of promotion. This will shift the destination image away from solely showing Tahiti, Bora Bora and Moorea, towards displaying all islands which will clearly enhance brand awareness. Next to the positive aspects, Tahiti also faced some challenges during the rebranding process. Problems experienced by the representations included the implementation of the brand guidelines according to the specific markets’ requirements, whilst following the global strategy. Also the change of customers’ perceptions is considered a major challenge as this will need a lot of time and effort of the representations.

As the rebranding was a recent phenomenon, GIE Tahiti Tourisme and the interviewees recommend measuring the positive or negative impacts one year after the completion of the process at the earliest. As one of the main goals was to increase the visitor numbers of French Polynesia, the measurement will be fairly easy to conduct and to analyse. Other short-term or long-term goals, such as brand awareness of both trade and consumers, will be analysed by means of questionnaires and feedback forms.

In conclusion, the rebranding process of Tahiti was a highly interesting case to study, as complete destination rebranding is very rare within the tourism industry. The rebranding helped Tahiti to highlight its unique assets and to reposition itself on the market. French Polynesia has a lot of potential, offering so much more attractions and touristic activities than other island destinations.

7. Limitations and Further Research

It has to be mentioned that the outcomes of this study will underlie certain limitations. During the research the author is only focusing on the importance of rebranding Tahiti and therefore the results may not be applicable to other tourism destinations, especially to

other islands in the Pacific Ocean. Only through conducting more case studies upon other islands, it would be possible to compare the outcomes of the study and to measure the true relevance of this paper. Nevertheless, destination branding is a highly interesting topic, and its understanding is recommendable to everyone working in the tourism industry. Furthermore, detailed research in the field of tourist destination rebranding shall be conducted as many destinations struggle with dissatisfying destination images.

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LS/t_-_Brand_Loyalty_piramide_van_Aaker__EN_.pdf> [Accessed 10.03.2015].

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Appendices

Appendix A: Tourism Statistics

Table 3: Tourist Arrivals 2007 – 2014 (ISPF 2015)

		2007	2008	2009	2010	2011	2012	2013	2014
Afrique		764	338	278	275	272	288	309	286
Amérique Centrale		1.602	1.308	880	948	1.170	1.242	978	1.060
Amérique du Nord		72.850	62.633	45.045	46.488	56.843	59.892	60.862	71.548
Amérique du Sud		6.993	6.565	5.791	5.902	5.534	6.078	6.491	5.547
Asie		25.597	21.226	18.990	16.715	15.971	16.505	17.384	18.288
Europe (hors France)	Allemagne	4.426	4.511	4.346	4.256	3.604	3.552	3.477	4.028
	Autre Europe	2.603	2.422	2.347	1.653	1.914	1.795	1.341	1.053
	Autriche	963	998	999	757	688	619	577	740
	Belgique	1.007	2.025	995	796	852	882	858	997
	Danemark	225	259	228	236	162	197	156	216
	Espagne	6.292	5.960	4.554	4.104	3.475	3.004	2.426	2.782
	Finlande	577	301	234	232	205	194	89	73
	Italie	14.385	13.802	11.944	11.208	10.471	9.409	8.103	7.887
	Luxembourg	140	168	143	198	109	135	60	137
	Norvège	329	272	168	158	201	244	296	218
	Pays-Bas	566	726	676	565	487	432	454	367
	Portugal	499	470	337	311	374	251	224	209
	Royaume-Uni	6.233	4.977	3.482	2.840	2.671	2.617	3.255	4.834
	Russie	744	805	601	519	699	587	847	640
Suède	558	528	411	324	283	286	273	446	
Suisse	2.497	2.240	2.136	1.860	2.242	2.559	2.663	2.911	
Europe (hors France) Total		42.044	40.464	33.601	30.017	28.437	26.763	25.099	27.538
France		43.161	42.374	39.256	36.544	35.835	35.898	32.946	34.887
Pacifique		24.887	21.406	16.405	16.799	18.513	22.044	20.048	21.077
Proche et Moyen Orient		343	182	201	231	201	268	276	371
Grand Total		218.24 1	196.49 6	160.44 7	153.91 9	162.77 6	168.97 8	164.39 3	180.60 2

Table 4: Specified calculations on Tourist Arrivals

	2007	2008	2009	2010	2011	2012	2013	2014	la moyenne
Amérique du Nord	72.850	62.633	45.045	46.488	56.843	59.892	60.862	71.548	59.520
Europe (hors France) Total	42.044	40.464	33.601	30.017	28.437	26.763	25.099	27.538	31.745
France	43.161	42.374	39.256	36.544	35.835	35.898	32.946	34.887	37.613
Italie	14.385	13.802	11.944	11.208	10.471	9.409	8.103	7.887	10.901

	2013	2014	% p.a.
Europe (hors France) Total	25.099	27.538	9,72
France	32.946	34.887	5,89
Royaume-Uni	3.255	4.834	48,51
Autriche	577	740	28,25

Table 5: Tourism Bed Nights 2007-2014 (ISPF 2015)

	2007	2008	2009	2010	2011	2012	2013	2014	
Amérique du Nord	752.291	660.930	466.939	482.544	569.141	610.319	627.846	777.484	
Amérique du Sud	82.136	74.303	63.254	65.953	61.190	69.441	75.632	68.538	
Asie	191.337	141.062	129.084	113.574	116.548	123.871	130.340	141.161	
Europe (hors France)	Allemagne	59.542	60.993	60.118	57.119	49.204	52.577	51.078	62.292
	Autre Europe	41.264	28.734	27.937	21.172	24.396	22.435	17.245	14.724
	Autriche	15.044	13.032	12.730	10.872	9.604	9.294	8.588	10.857
	Belgique	19.089	27.862	17.870	15.682	15.898	17.845	16.405	21.029
	Danemark	3.154	4.222	3.955	3.748	2.314	3.449	2.323	4.379
	Espagne	63.123	55.473	43.749	39.447	34.498	29.869	26.542	28.635
	Finlande	5.923	3.809	2.245	2.807	2.341	1.850	1.690	851
	Italie	181.539	159.250	137.994	126.849	117.760	103.466	94.934	104.907
	Luxembourg	2.787	2.610	2.065	3.071	1.958	2.060	924	2.218
	Norvège	3.773	3.521	2.159	2.308	2.779	4.155	3.819	2.677
	Pays-Bas	6.881	9.083	8.127	7.656	6.340	6.159	5.849	5.009
	Portugal	6.629	5.551	3.292	3.139	4.164	3.120	3.599	3.192
	Royaume-Uni	61.033	51.372	36.631	31.034	28.418	30.288	38.785	57.746
	Russie	10.339	10.545	7.811	6.133	8.762	7.499	12.268	8.684
Suède	6.881	6.425	4.863	4.195	3.854	3.573	4.529	5.915	
Suisse	45.090	39.202	37.043	33.199	39.206	47.100	47.997	55.127	
Europe Total	532.090	481.684	408.589	368.431	351.496	344.739	336.575	388.242	
France	1.050.728	1.005.332	936.340	921.390	948.470	959.467	880.944	985.072	
Pacifique	252.215	218.159	184.975	195.307	216.576	250.737	241.232	257.355	
Grand Total	2.897.201	2.602.805	2.204.955	2.166.994	2.281.874	2.379.851	2.311.123	2.641.347	

Table 6: Length of Stay 2007 – 2014 (ISPF 2015)

	2007	2008	2009	2010	2011	2012	2013	2014	
Afrique	18,61	16,05	15,54	21,34	19,01	18,19	15,26	20,09	
Amérique Centrale	11,16	10,44	10,33	11,15	9,05	10,11	10,41	12,14	
Amérique du Nord	10,33	10,55	10,37	10,38	10,01	10,19	10,32	10,87	
Amérique du Sud	11,75	11,32	10,92	11,17	11,06	11,42	11,65	12,36	
Asie	7,47	6,65	6,80	6,79	7,30	7,51	7,50	7,72	
Europe (hors France)	Allemagne	13,45	13,52	13,83	13,42	13,65	14,80	14,69	15,46
	Autre Europe	15,85	11,86	11,90	12,81	12,75	12,50	12,86	13,98
	Autriche	15,62	13,06	12,74	14,36	13,96	15,01	14,88	14,67
	Belgique	18,96	13,76	17,96	19,70	18,66	20,23	19,12	21,09
	Danemark	14,02	16,30	17,35	15,88	14,28	17,51	14,89	20,27
	Espagne	10,03	9,31	9,61	9,61	9,93	9,94	10,94	10,29
	Finlande	10,26	12,65	9,59	12,10	11,42	9,54	18,99	11,66

	Italie	12,62	11,54	11,55	11,32	11,25	11,00	11,72	13,30
	Luxembourg	19,91	15,54	14,44	15,51	17,96	15,26	15,40	16,19
	Norvège	11,47	12,94	12,85	14,61	13,83	17,03	12,90	12,28
	Pays-Bas	12,16	12,51	12,02	13,55	13,02	14,26	12,88	13,65
	Portugal	13,28	11,81	9,77	10,09	11,13	12,43	16,07	15,27
	Royaume-Uni	9,79	10,32	10,52	10,93	10,64	11,57	11,92	11,95
	Russie	13,90	13,10	13,00	11,82	12,54	12,78	14,48	13,57
	Suède	12,33	12,17	11,83	12,95	13,62	12,49	16,59	13,26
	Suisse	18,06	17,50	17,34	17,85	17,49	18,41	18,02	18,94
Europe (hors France) Total		12,66	11,90	12,16	12,27	12,36	12,88	13,41	14,10
France		24,34	23,73	23,85	25,21	26,47	26,73	26,74	28,24
Pacifique		10,13	10,19	11,28	11,63	11,70	11,37	12,03	12,21
Proche et Moyen Orient		12,56	12,42	11,76	14,52	13,39	12,97	13,24	13,15
Grand Total		13,28	13,25	13,74	14,08	14,02	14,08	14,06	14,63

All data was retrieved from the official *Institut de la statistique de la Polynésie française* (ISPF) website [<http://www.ispf.pf/>] on April 20, 2014.

Appendix B: Press Releases – Future Brand and Tahiti Tourisme

FutureBrand

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SEARCH

Tahiti Tourisme new global identity

A new global brand positioning and identity for Tahiti Tourisme



25 Jun 2014, by FutureBrand

Melbourne, Sydney, 25 June 2014

Tahiti Tourisme has launched its new global brand positioning and identity for the Islands of Tahiti in Australia and simultaneously in 14 key markets across the world including USA, France, Italy and Japan.

It follows a comprehensive and strategic project led by Tahiti Tourisme, which recognised the challenges ahead and the need to stand out in the increasingly competitive world of global tourism.

The rebrand, developed with global creative company FutureBrand, underlines how the Islands of Tahiti are one of the few places in the world that combine an authentic living culture with striking, untouched natural beauty and sophisticated luxury.

Anne-Sophie Lesur, Chief Executive Officer of Tahiti Tourisme Board, said "The core elements of the new brand approach, plus the visual elements which will help us express our passion for French Polynesia, give us a platform to build a consistent story across all markets, informing and inspiring our target consumer and key audiences and partners alike. It marks a moment in time, in our story, where we look confidently towards the future and plan for it together with local industry, partners and government."

Speaking of the work at the main presentation of the new brand in Los Angeles, Sally McNeill, Managing Director of FutureBrand Australia said, "Through all our work in tourism and country branding, we know that the biggest challenge is the need to convey the authenticity of the destination without resorting to stereotypes and clichés. It is also important to ensure that a true and compelling positioning is developed that not only drives tourism but also has the power to create economic opportunity for that nation – delivering what the tourism industry needs now, as well as what society needs in the long term. To uncover the real insights, our team worked closely with the head office team in Pape'ete, collaborating with many local experts in tourism and hospitality, heritage and local culture".

A new brandmark has been created at the core of the visual identity, developed with a dual perspective so that it works for both the destination and the corporate entity of Tahiti Tourisme. "Inspired by our travels and research in the islands, the brandmark embodies the diversity and raw beauty of the landscape combined with a sense of the deep, rich culture and passion of its people", McNeill said. "The meaning behind the considered treatment of the 'H' announcing 'Hiti' is very symbolic to the Tahitians as it means 'gateway', depicting the variety of multiple islands that comprise the entire territory of French Polynesia and forming the frontiers of the destination."

Building on the beauty and warmth found in the traditional craft of Tifaifai still practiced widely today, the visual identity system incorporates patterns and symbols from iconic plants and flowers found across the islands. The corporate graphic depicted in the symbolic 'tattoo blue' of the landmark is combined with the elegance of white, core colours within the system. Of great importance is the new approach to photography supported by a broad colour palette, reflecting the diversity of the islands and the strategic story.

The new identity encourages audiences to consider the beauty that lies beneath the surface of the picture-perfect postcard; the beauty of the powerful and profound impact that the land and people can have on those who visit. It sets the scene for more in-depth storytelling and cultivates a curiosity to visit and experience the different islands on a journey of discovery, renewal and personal and sensorial rejuvenation.

Minister of Tourism Geffry Salmon said the repositioning of the destination was intended to drive tourism and also create economic opportunity for the nation through investment and trade.

"Throughout this project it has been important that the authenticity and passion of French Polynesia is reflected and captured appropriately. Tahiti Tourisme's new brand identity, and that of the destination of our Islands, is a celebration of the place, the people, its history and of course its future", Mr Salmon said.

Reflecting on the work and its potential impact on French Polynesia and its people, Richard Curtis, Chief Executive Officer of FutureBrand Australia said: "Country and destination branding is a real passion and expertise for FutureBrand globally. Having the opportunity to work with organisations like Tahiti Tourisme, who also share our vision to create a more positive future, is an essential part of how we are able to create powerful and effective brands".

The new identity is being rolled out in full over the remainder of this year across website and collateral materials, as well as a refresh of the advertising and activations over the next 12 months.

Notes for editors

FutureBrand is the creative future company: a global brand and innovation company, and a part of the Interpublic Group. Through traditional branding skills and foresight, we help companies create the future for their brands and businesses. Around the world, we combine strategic thinking and creative inspiration to help our clients create, build and manage brands. Whether branding a company, a product, a service or a movement we believe that great results can only be achieved through a combination of inspiration and collaboration.

We work in over 20 markets around the world with clients such as Fiji Airways, American Airlines, Bupa, HostPLUS, Intel, London 2012, UPS, Xstrata and Zurich.

www.futurebrand.com

Retrieved from [<http://www.futurebrand.com/news/tahiti-tourisme-new-global-identity>]
on May 15, 2015.

Tahiti Tourisme Launches New Global Brand Positioning and Identity

June 18 2014

Tahiti Tourisme launches its new global brand positioning and identity for the Islands of Tahiti, simultaneously in 14 key markets across the world today. It follows a comprehensive and strategic project run by Tahiti Tourisme who saw the necessity, in the increasingly competitive world of global tourism, to recognize the challenges ahead and the need to be differentiated; to stand out from competition and remain relevant to visitors.

The repositioning of the destination intends to not only drive a measured increase in tourism but also the power to create economic opportunity for the nation through investment and trade.

“With 118 islands and atolls spread out over five archipelagoes covering an area as large as Western Europe, the Islands of Tahiti have quite a bit to be discovered and the newly revamped brand will be extremely beneficial in getting this message across here in North America, said Jonathan Reap, Managing Director, Tahiti Tourisme North America. “We look forward to working with all of our travel partners to further the new branding for the islands.”

“Throughout the work it has been of utmost importance that the authenticity and passion for the real strengths of French Polynesia are reflected and captured appropriately. Tahiti Tourisme’s new brand identity, and that of the destination of our Islands, is a celebration of the place, the people, its history and of course its future,” said French Polynesia Minister of Tourism Geffry Salmon.

Reflecting the timeless culture and way of life through the positioning and an elegant and premium approach to color, type and photography, the new identity encourages potential visitors to consider the beauty that lies beneath the surface of the picture-perfect postcard; the beauty of the powerful and profound impact the land and people can have on those who visit. It sets the scene for more in-depth storytelling and cultivates a curiosity to visit and experience the different Islands on a journey of discovery, renewal and personal and sensorial rejuvenation.

With the aim of creating a more contemporary understanding and desire for all that French Polynesia has to offer, the new brand serves to set the foundations for future marketing

activities and builds on the long-term strategies for the nation’s tourism and hospitality industry designed to meet the needs and expectations of the future traveler. The new identity, developed with global creative company FutureBrand, is being rolled out in full over the remainder of this year across website and collateral materials, as well as a refresh of the advertising and activations over the next 12 months.

“The core elements of the new brand approach, plus the visual elements which will help us express our passion for French Polynesia, give us a platform to build a consistent story across all markets, informing and inspiring our target consumer and key audiences or partners alike. It marks a moment in time, in our story, where we look confidently towards the future and plan for it together with local industry, partners and government,” states Michel Monvoisin, Chairman of Tahiti Tourisme Board.

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Retrieved from [http://www.tahiti-tourisme.com/media/pressdetail.asp?id=74] on May 18, 2015.

Appendix C: Rebranding Images

The following pictures display the new identity that French Polynesia is promoting after the rebranding in 2014.



Figure 22: Tahiti aerial view (C. McLennan 2015)



Figure 23: Randonnée sur les hauteurs de la Vallée de la Papenoo, Tahiti. In the heights of the Papenoo valley, Tahiti (T. Sawyer n.d.)



Figure 24: Overwater bungalows (C. McLennan 2015)



Figure 25: Vue aérienne du lagon et du récif de Bora Bora (P. Lesage n.d.)



© GIE TAHITI TOURISME - T. McKenna

Figure 26: Danseurs et Danseuses (T. McKenna n.d.)



© GIE TAHITI TOURISME - L. Pesquie

Figure 27: Areal view of Huahine (L. Pesquie n.d.)

Appendix D: Interview 1

Structured interview with experts working at GIE Tahiti Tourisme or at one of its representations worldwide, to deepen the understanding of the rebranding process of Tahiti.

Received on: April 20, 2015

PERSONAL INFORMATION

Name: __Ilija Ganopolski_____

Please indicate at which office you are currently working: __Tahiti Tourisme Germany, Switzerland, Austria represented by Eyes2market GmbH_____

Current position held: _Director Marketing DACH_____

REBRANDING OF TAHITI

1. What were the main reasons for the rebranding?
 - The main reason was to position The Islands of Tahiti away from the typical beach destination as the competitors were promoting the same. The destination identified core values and attractions besides the beach and is trying to promote it now.

2. What are the main goals (short-term and long-term)?
 - Short term: Increase brand recognition, streamline the image of the destination among all markets, create contiguous story telling possibilities, making people aware of the culture and traditions
 - Long term: To create a different picture in customer's mind. To present ourselves as the only destination that combines nature, culture and people with island diversity and sustainability. Through positioning ourselves as a different destination, to increase tourism figures to Tahiti.

3. Competition is always a main issue in the tourism industry. Will a new brand help to become competitive on the marketplace? Who are your main competitors at the moment – did they change after the rebranding?
 - Competition was one of the main reasons of the whole rebranding process. Our direct competitors such as Fiji Islands, Cook Islands, Hawaii etc. were mainly promoting the destination the same way we did. Beach and water were always the key messages. Other competitors such as Maldives and Seychelles were using the same messages of overwater bungalows in a pristine nature. With the rebranding we are trying to diversify our destination and to show the client that there is much more to explore on the Islands of Tahiti than overwater bungalows in a pristine nature. The new messages tend to promote the culture, the nature and the people. So far we have not seen any significant change in the promotional strategy of our competitors.

4. What does the new brand mean for tourists (both loyal and potential visitors)? How will they be influenced by it?
 - They will see a different picture from our destination. They will see the difference between Maldives where they can only relax at the beach and The Islands of Tahiti where you can hike, do horse riding, swim with dolphins, dive, do 4x4 drive tours and all in one day. This will motivate the clients to come to our destination instead going to another.

5. Were there main rebranding strategies applied? Please give a short overview on the strategies your organization implemented.

The very first step was to define our core values and activities. What is it that makes Tahiti special or different compared to other destinations? The new target group needed to be defined with all the preferences, specialties and motivation factors. Research was done on the target group to find the best way to address them. The rebranding is a long term process and needs to be monitored closely. The major goal is to have the process finished within the next two years. The first step was to change the visuals, the logo, the images, the trade fair appearance, the brochures, the banners, the way of promoting ourselves in magazines and other media, the creation of a new website the change of our Tiaré specialist program. During the time the launch was announced in all countries simultaneously and interviews were given to the trade press to inform the travel trade about the process.

The second step is more deepen and will last longer. This step includes the whole new way of communication. Communication will address both, B2B and B2C clients and is currently developed by an communication agency in the US. This agency is creating our new appearance on the markets. Online banners including the messages,

guidelines for future advertisements etc. Within this step we will also start to train the agents about the new strategy.

6. Which brand components were changed (e.g. logo, slogan...)? How will the new brand image be presented and illustrated?

See above

7. What were the main difficulties that were faced during the rebranding process?

- Main difficulty is to address your own market with the guidelines and strategies provided by the head office. Sometimes slogans need to be changed in order to fit the German market but it is important to still follow the global strategy. Another difficulty is to bring these new pictures into peoples' mind. For many years people thought that The islands of Tahiti only consisted of Bora Bora with beautiful lagoon and beach. Now, it needs time to explain them that there is much more than that to explore.

8. How will your organization measure the impact of the rebranding? When do you think is a reasonable point in time to analyze the positive or negative effects?

- First of all we are measuring the impact already through our daily work. When we talk to the travel trade we are asking them about their feedback regarding the rebranding. More important is the feedback of customer which we cannot reach at the moment due to a missing end consumer database. Tahiti Tourisme is doing some evaluations in terms of questionnaires on a regular basis to get the feedback from the end consumer. The best indicator will be the number of tourists travelling to the destination. If the tourism figures will increase it will indicate that the messages we are using are right and that people are getting attracted by those messages and images. It is difficult to tell an exact time when to measure the results as I think the results should be measured continuously. Every day you receive a feedback is a result and needs to be evaluated.

9. Do you have any other comments you would like to share concerning this project of rebranding?

Appendix E: Interview 2

Structured interview with experts working at GIE Tahiti Tourisme or at one of its representations worldwide, to deepen the understanding of the rebranding process of Tahiti.

Received on: April 20, 2015

PERSONAL INFORMATION

Name: Sarah Junker _____

Please indicate at which office you are currently working: UK _____

Current position held: Account Manager _____

REBRANDING OF TAHITI

1. What were the main reasons for the rebranding?

It was felt that the old brand did not reflect the core messaging we were conveying about the destination, nor the view the public had of the destination. It was outdated and looked a bit too 'low market'. We wanted to create a brand that would convey sophistication, elegance and heritage – and allow us to focus more on the unique aspects and qualities of the destination, including its heritage.

2. What are the main goals (short-term and long-term)?

Short-term: refresh the brand, create excitement among trade, raise awareness among trade, indicate a new start for the destination, inject some momentum into the brand.
Long-term: raise awareness among consumers, increase bookings, re-position the brand to target more qualified audience (global explorers, affluent travelers..)

3. Competition is always a main issue in the tourism industry. Will a new brand help to become competitive on the marketplace? Who are your main competitors at the moment – did they change after the rebranding?

Have a look at the below table – those were our competitors as identified for our 2015 market plan. The numbers are visitors for the period defined.

It's much too soon to say whether the rebrand has had any effect on competitors' performance.

	2009	2010	2011	2012	2013	2014 (Jan-Jun)
Cook Islands	5,898	3,998 (-32%)	3,474 (-13%)	2,815 (-18%)	2,959 (5%)	1,527 (-4.6%)
Fiji	26,213	23,813 (-9%)	24,054 (1%)	17,076 (-29%)	17,209 (1%)	8,611 (1%)
Maldives	105,950	114,158 (8%)	104,508 (-8%)	91,776 (-12%)	85,869 (-6%)	42,255 (4%)
Mauritius	101,996	97,548 (-4%)	88,182 (-9%)	87,648 (-1%)	98,017 (12%)	47,142 (11%)
Seychelles	11,292	12,322 (9%)	13,291 (8%)	11,200 (-16%)	12,493 (11%)	5,434 (-5%)
Tahiti	3,482	2,840 (-22%)	2,671 (-6%)	2,617 (-2%)	3,255 (+20%)	2,337 (+75%)
Thailand	841,425	810,727 (-4%)	844,972 (4%)	873,053 (3%)	900,502 4 (4%)	467,293 (6%)

- What does the new brand mean for tourists (both loyal and potential visitors)? How will they be influenced by it?

It should mean very little to loyal visitors, though there is not much repeat business in the UK market (i.e. 'loyal' tourists who return – it's still a once-in-a-lifetime destination). The effect on potential visitors will hopefully be a re-positioning in their minds, to associate more diverse holiday experiences with the destination, and more sophistication. As mentioned, hopefully the re-brand will result in more enquiries and bookings.
- Were there main rebranding strategies applied? Please give a short overview on the strategies your organization implemented.

Brand launch: this was a trade and media-only event held to coincide with the global brand launch in summer 2015. We invited key partners and hosted them to an evening of brand information, food and drinks.

Trade communication: e-newsletter to trade database to inform of new brand
Immediate use of new brand materials (logo, images) in all of our communication and ensuring that partners are aware of the new brand guidelines (for ex by sending out the brand guidelines document)

Trade workshop: in September, to capitalize on the momentum created by the brand launch.
- Which brand components were changed (e.g. logo, slogan...)? How will the new brand image be presented and illustrated?

Logo, tagline ('slogan'), images, messaging.

7. What were the main difficulties that were faced during the rebranding process?
As this was mainly handled by head office, we had very few challenges to deal with. Certainly one would be to coordinate all markets' different requirements for the brand and also their feedback.

8. How will your organization measure the impact of the rebranding? When do you think is a reasonable point in time to analyze the positive or negative effects?
Within a year for initial evaluation. Head office will conduct much of this. We will assess with trade feedback, perhaps surveys, though this is still TBC.

9. Do you have any other comments you would like to share concerning this project of rebranding?