A COMPARISON OF THE PROJECTED AND THE PERCEIVED IMAGE OF CYPRUS

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The purpose of this research is to identify and compare the projected and perceived images of Cyprus following repositioning. Secondary sources such as brochures, advertising campaigns and tourism websites were used to identify the projected image and a survey was performed to measure the perceived image. Questionnaires including closed and open-ended questions evaluating destination attributes and perceived image were disseminated to 393 British tourists. The research identified the differences between the two concepts, revealing that the marketing strategy of Cyprus has not managed to enhance destination image. The paper concludes with recommendations on marketing Cyprus tourism.

Keywords: *destination image; tourism marketing; Cyprus*

JEL Classification: *L83, M1, O1*

INTRODUCTION

For the past decade mass tourism destinations have been trying to distinguish themselves from competitors by developing alternative tourism forms and enriching their images. Destination image has received great academic attention as it influences destination selection (Vaughan and Edwards, 1999; Tapachai and Waryszak, 2000; Gallarza et al, 2002; Mohamed, 2008). However, most past studies have focused on the measurement of destination image (Driscoll et al, 1994), its components (Dann, 1996) and the identification of the factors that influence it (Walmsley and Jenkins, 1993). Little attention has been paid to the comparison between the projected and the perceived images of

destinations. The measurement of fit between the projected and perceived images of destinations can yield important findings in terms of tourism marketing by allowing the exploration of tourist satisfaction. This is particularly true for traditional mass tourism destinations which tend to focus on alternative marketing strategies that support image alteration and redesign (Buhalis, 2000).

The purpose of this research paper is to compare the projected and perceived images of Cyprus in order to measure the degree of image enhancement following repositioning efforts. First, a review of literature on destination image is provided, followed by a discussion of the concepts of projected and perceived image. The image of Cyprus as projected by the Cyprus Tourism Organisation (CTO) is analysed through secondary sources, whereas the perceived image is measured through primary research. After analysis, the projected and perceived images are compared to determine the fit between the two.

LITERATURE REVIEW

Destination Image

The concept of destination image is not precisely defined making it difficult to conceptualise and measure image (Grosspietsch, 2004). Kotler (1991:570) defined image as "the set of beliefs, ideas and impressions that a person holds of an object". More specifically, Gartner (1986) defined destination image as an individual's perception of attributes or activities available at a destination and McKay and Fesenmaier (1997:538) suggested that "a destination's image is a composite of various products and attributes woven into a total impression". These definitions show that destination image has been related to attributes and most past studies have used a set of attributes to measure it. However, Echtner and Ritchie (1991; 1993) argued that destination image consists of both attribute-based and holistic components and that the conceptualisation of image should embrace both (Dann, 1996; Imbrahim and Gill, 2005). Several researchers (Gartner, 1993; Baloglu and Brinberg, 1997; Baloglu and McCleary, 1999) agree that image is a concept formed by consumers' reasoned and emotional interpretation as a result of the interaction of a) the perceptive evaluations referring to an individual's knowledge and beliefs about a destination and b) the affective appraisals relating to an individual's feelings towards the

destination (Beerli and Martin, 2004). These two factors produce an overall image, which relates to the positive or negative evaluation of the product. This research paper incorporates both attribute-based and holistic aspects of destination image measuring their impact on the perceptive and affective image component.

The Role of Image in Tourism Marketing

The manipulation of destination image by tourism organisations to influence destination selection and consumer behaviour is widely recorded. According to Font (1998) knowledge of tourist image is important for destination positioning and differentiation. The marketing value of image is that it allows an intangible product like a destination to position itself against competitors (Wind, 1982) through the creation of a brand. Ashworth (1991) stated that the tourism product is a set of experiences packaged as a destination and marketed through images. Through advertising, product attributes are formed (Deighton and Schindler, 1988) and image becomes an artificially created differentiation. According to Wernick (1991) image promotion is concerned with transferring meaning onto a product in order to increase demand. As Mayo (1973) argued, tourists hold in their minds images of an ideal destination, which leads them to choose the destination that promises to provide them with the greatest amount of satisfaction. The traveller is likely to choose the destination with the most favourable image (Gartner, 1989). Therefore, image plays an important role in the destination selection process (Kamenidou et al, 2009).
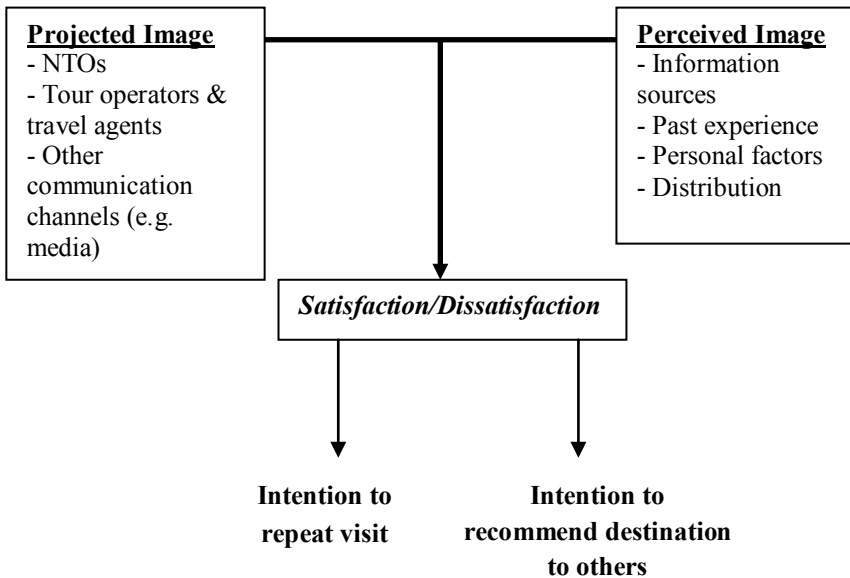
Projected and Perceived Images

Ashworth (1991) argues that images can be projected, whether consciously through promotion or unconsciously through communication channels, and then received by consumers which assemble the messages according to their predisposed constructs, which will influence their behaviour. Hence, image is of two types: the projected image formed through the promotional activities of tourism organisations and tour operators and the perceived image held by the tourist, which is influenced by the information received through word-of-mouth and experience (Kotler et al, 1993). The distinction between projected and perceived

image provides a useful approach for analysing image from a managerial and methodological viewpoint (Andreu et al, 2000).

Researchers have defined projected image as a 'pull' factor in the destination decision process. According to Smith (1989) pull factors are related to the destination's cultural, environmental and recreational characteristics, used by tourist organisations and tour operators to attract tourists to the destination. Alternatively, socio-psychological variables such as motivation, preference and perception act as 'push' factors that predispose tourists to travel (Baloglu and Uysal, 1996). Tourists evaluate destinations according to their perception of the benefits offered by a destination; this evaluation is performed through images (Batra et al, 1996).

Figure 1 Relationship of Image and Satisfaction

Projected Image
- NTOs
- Tour operators & travel agents
- Other communication channels (e.g. media)

Perceived Image
- Information sources
- Past experience
- Personal factors
- Distribution

Satisfaction/Dissatisfaction

Intention to repeat visit

Intention to recommend destination to others

Source: Author (2011)

According to Ryan (2003) tourists arrive at the destination with pre-conceived images. Bigne et al (2001) argued that image moulds expectations before the actual visit; hence, image is directly linked to tourist satisfaction (Chon and Olsen, 1991) as an actual visitation at the destination will influence satisfaction level, depending on whether the projected image in tourists' minds corresponds to the actual experience. Hence, satisfaction is important in enhancing destination image (Stylidis et al, 2008). Chon (1990) argues that dissatisfaction may result in avoidance of a repeat visit and a negative image communicated to other individuals (Gitleson and Kerstetter, 1994). The relationship between the projected, the perceived image and satisfaction is depicted in figure 1.

Following increased competition and changing tourist needs, several destinations have opted to reposition themselves to enrich their image. This is true of Mediterranean coastal resorts that wish to shift away from their 'sea and sun' images. Such repositioning strategies entail the enrichment of destination image through the development of new products and the improvement of service quality. It is therefore important to measure the degree of fit between the projected and perceived image to determine whether marketing strategies are successful in repositioning destinations.

THE PROJECTED IMAGE OF CYPRUS

Following examination of the strategy for Cyprus' repositioning, it is evident that the destination's image must be viewed in terms of the 'sea and sun' product and the SIT (special interest tourism) products. To analyse the projected image of Cyprus past research, advertising and positioning strategies initiated by the CTO and the tour operators were considered. Additional information was derived from internet websites.

Cyprus: A 'sea and sun' destination

The rapid mass tourism growth in Cyprus established it as a popular 'sea and sun' destination. Following the Turkish invasion a spatial restructuring occurred on the island, which shifted tourism development to the coastal areas, increasing the dependency of Cyprus on the 'sea and sun' all-inclusive package, which revolved around common attributes with few distinguishing factors. The emphasis on the 'sea and sun' image was evident in the island's communication strategy. Much of the CTO's

advertising was directed at reinforcing the island's main characteristics: sea, sun and sand. In the 1990s, in order to project a broader image and strengthen perceived 'quality', the CTO promoted the island's abundant cultural resources. However, research has shown that only 35% of tourists made trips outside their resorts, many of which were not for cultural purposes (CTO, 1993b), indicating the strong image of Cyprus as a 'sea and sun' destination (Sharpley, 2003). This image of Cyprus had been largely influenced by tour operators, which promoted the island as a safe summer, sea and sun destination with an emphasis on fun, relaxation and romance (Sharpley, 1998a). The promotion of Cyprus as a cultural, quality destination was further impeded by the popularity of Ayia Napa, which quickly became a haven for clubbers (Spanou, 2007).

In the late 1990s, competition and a deteriorating market highlighted the importance of distinguishing the destination from competitors and communicating to potential markets its authentic character and tradition. Hence, the CTO initiated a repositioning strategy in an attempt to diversify the destination.

SIT Product Image

A range of SIT products has been attached to the main 'sea and sun' product in order to enrich the tourist experience and destination image. Their development required the addition of several functional and psychological attributes, which had to be communicated to potential markets effectively. The CTO initiated an integrated communication strategy in an attempt to consolidate the image of the island. Until the late 1990s the CTO's promotion of the destination lacked a holistic approach; separate advertising campaigns were launched by different local advertising agencies in each target market leading to a profusion of messages and images. Since the late 1990s it was realised that a unified campaign was required and hence the advertising campaign was assigned to one international agency that was responsible for communicating the diverse tourist experience Cyprus offered in an integrated message to all target markets. Table 1 shows the latest advertising slogans.

The first slogan "*Cyprus: A whole world on a single island*" aimed to emphasise the small geographical area of Cyprus which allows tourists to perform several activities within a small island. The second slogan "*Cyprus: The island for all seasons*" emphasised the mild climate of the island that allows tourists to perform activities year-round whereas the

latest slogan "*Love Cyprus*" aims to inspire emotions in potential tourists and point out the relation of the island to Aphrodite, the goddess of love. The CTO's communication strategy includes generic advertising campaigns in the main communication channels and promotional activities such as the hosting of journalists, who act as secondary information sources and are powerful in influencing images.

Table 1 Cyprus Advertising Slogans

Slogans	Main campaign features
"Cyprus: A whole world on a single island" Adv. Agency: Bates Europe Ltd	• Emphasises a range of products, including culture and historical tradition, natural richness and a diversity of activities • Shift away from the 'sea and sun' product and image by inviting people to explore the island • Emphasises the small geographical area of the island which allows tourists to travel around easily
"Cyprus: The island for all seasons" Adv. Agency: Scholtz & Friends AG	• Attempts to extend the seasonality by emphasising the mild weather of Cyprus year-round • Emphasis placed on the activities which could be performed in low seasons including rural tourism, sports, sightseeing etc
"Love Cyprus" Adv. Agency: Adel Saatchi & Saatchi	• An emotional message which acts as a statement and an invitation (CTO, 2006) • Distinguishes Cyprus by connecting the island with goddess of love Aphrodite • The use of several pictures allows for the promotion of the diverse tourist experience of Cyprus • Is used with the complementary message "the year round island" as a continuance of previous campaigns and as an attempt to extend seasonality

Source: Adapted from Andreu et al (2000)

In addition, PR campaigns have been initiated such as workshops in Cyprus for foreign travel agencies, presentations to specialised groups and educational trips for tour operators to convince them to promote Cyprus as a quality destination.

The CTO also takes part in international tourism exhibitions; in 2010 the organisation participated in 130 tourist fairs. In order to promote SIT, the CTO advertises the destination in tourism trade magazines and in special events such as exhibitions, sport and cultural events. The importance placed by the CTO on communication and promotion is evident in the expenditure on advertising campaigns, which tends to increase over the years. Table 2 shows the total advertising budget from 1998-2008.

Table 2 Advertising Budget

Year	CY£
1998	7155000
1999	6025000
2000	7760000
2003	7847329
2004	8528400
2005	9680450
2006	9400000
2007	9400000
2008	12000000

Source: CTO (2008)

The advertising budget has increased between 1998 and 2008 from CY£7,155 million to CY£12 million, despite small decreases which occurred in 1999, 2006 and 2007. The majority of the budget was allocated to the priority target markets such as the UK, Germany and Russia. However, the extent to which such efforts have been successful in improving the perceived image remain unexplored. Past studies have shown that there are differences between the projected and perceived image (Andreu et al, 2000; Grosspietsch, 2004). Therefore, it is significant that the projected and perceived images of Cyprus are identified and compared.

METHODOLOGY

Research Objectives and Questions

The introductory section of this research paper has pointed out the lack of research into the relationship between the projected image and the perceived image of destinations. To address this gap, this research aims to identify and compare the projected and the perceived image of Cyprus following its repositioning efforts to determine whether: a) its marketing strategies have been successful in increasing tourist satisfaction and b) the perceived image of Cyprus has been enhanced. In order to achieve this, the projected image is explored through secondary sources and compared with the perceived image which is identified through primary research. In addition, the perceived image is measured across several variables that affect its formation to uncover important managerial implications. Consequently, the primary research objectives are:

1) The exploration of the perceived image in relation to the factors that affect its formation;

2) The identification of the perceived image of Cyprus; and

3) The evaluation of destination attributes in terms of quality and value for money.

Regarding research question 1, it is proposed that the perceived image be measured in terms of the key factors influencing it, namely tourists' information sources, personal factors, past experience and distribution method. Thus, the following hypotheses are formed:

Hypothesis 1: The perceived image varies according to tourist demographic factors and motivations.

Hypothesis 2: The perceived image varies according to information source types.

Hypothesis 3: The perceived image varies according to the number of previous visits.

Hypothesis 4: The perceived image varies according to the way the trip is organised.

Regarding questions 2 and 3, the overall image of the destination is considered together with perceived quality and value for money in relation to destination attributes drawn from previous studies.

Sampling

A survey was conducted between June and August 2009 in order to identify the perceived image of Cyprus. A self-completion questionnaire was disseminated to 557 British tourists at Larnaka airport's departure lounge; 440 questionnaires were returned and 47 questionnaires were regarded as unusable. The sample used was considered representative of the population as more than 50% of total tourist arrivals are from the UK and 40% of tourists arrive in the summer months; also, tourists with experience at the destination were required to compare between the projected and perceived images.

The purpose of the questionnaire was to elicit respondents' attitudes on a variety of issues relating to their experience in Cyprus. Specifically, the questionnaire aimed to measure perceived image through the rating of several attributes as well as to explore relationships between variables affecting image formation and perceived image. Thus, the questionnaire was based on closed-ended questions, which included 5-point Likert scales that measured the respondents' attitudes on a variety of destination attributes in terms of value for money and quality, 7-point numerical scales that measured the respondents' perception of overall value for money and quality, satisfaction level and likelihood of recommendation, a ranking question whereby destination attributes were ranked and a semantic differential scale used to obtain respondents' attitudes over a series of bi-polar adjectives about the destination. Two open-ended questions were also included to allow respondents to describe Cyprus in their own words and make suggestions about the improvement of the tourism product. Analysis of the data was performed using SPSS whereas the open-ended questions were analysed using thematic analysis.

RESEARCH FINDINGS AND DISCUSSION

Respondents' Characteristics

A total of 393 completed questionnaires were collected by the researcher indicating a response rate of approximately 70.6%. The key characteristics of the sample were that 47.9% belonged in the 18-34 age group, 73.9% were either married or in a relationship, 66.2% were repeat visitors and 83.2% visited for leisure purposes. A detailed profile is presented in table 3.

Table 3 Respondents Profile

Characteristic	Number	Percentage
<u>Age</u>		
18-24	130	33.9
25-34	54	14
35-44	45	11.7
45-54	50	13
55-64	70	17.9
65-74	34	8.8
75+	3	0.8
<u>Gender</u>		
Female	204	52
Male	188	48
<u>Marital Status</u>		
Single	90	23
In a relationship	104	26.5
Married	185	47.4
Divorced	11	2.8
Widowed	1	0.3
<u>Travelling with children</u>		
Yes	58	14.8
No	333	85.2
<u>Educational Level</u>		
Secondary school	100	26.5
Work training	195	51.6
BA degree	56	14.8
MA degree or higher	27	7.1
<u>First-time Visitor</u>		
Yes	133	33.8
No	260	66.2
<u>No. of Previous Visits</u>		
One	58	22.3
Two or more	202	77.7
<u>Primary Reason for Travel</u>		
Holidays	326	83.2
Religious	3	0.8
Visit friends/family	45	11.5
Health	2	0.5
Business	1	0.3
Other	15	3.8

Factors influencing travel		
decision	218	55.5
Family/friends	36	9.2
Tour operator/travel agent	13	3.3
Advertising	25	6.4
Media	126	32.1
Past experience	31	7.9
Other		
Travelling on Packaged Tour		
Yes	153	38.9
No	240	61.1
Packaged Tour Components		
Transportation	153	100
Accommodation only	23	43.8
Accommodation B&B	24	15.7
Accommodation H/B/FB	61	39.9
Excursions/tours	7	4.6
Other	3	2

Respondents' Perception

Factors affecting Image Formation

Statistical tests such as correlation coefficients and multiple regression were used to explore relationships between variables and independent t-tests, while ANOVA and MANOVA were used to explore differences between groups. The first step in ensuring a reliable set of scales measuring the attribute-based components of destination image was to perform factor analysis using principal component analysis with varimax or oblique rotation procedure. Hence, the cognitive and affective image components were derived. In terms of the cognitive image three factors with an eigenvalue greater than 1 were retained. Examination of the scree plot supported the conclusion of a three-component solution. The three factors accounted for approximately 57% of the item variance (36.8%, 11.6% and 8.9% respectively).

Three variables were created of which the first represents the 'attractiveness' of the destination by summarising evaluations of the 'environment' and 'hospitality', the second represents 'activity', summarising evaluations of 'outdoor activities' and the third represents

the typical 'holiday', summarising evaluations of 'sea' and 'having fun'. This can be seen in table 4.

Table 4 Cognitive Image Component
Pattern Matrix[a]

	Component		
	1	2	3
beautiful scenery	**,433**	,104	,218
friendly people	**,802**	-,240	-,079
day activities	,163	,291	**,635**
evening activities	-,066	,003	**,768**
excellent beaches	-,063	-,250	**,793**
good sports facilities	,248	**,487**	**,441**
relaxed atmosphere	***,548***	-,344	,211
good weather	,312	**-,741**	,258
good value	**,402**	,323	,129
attractive towns	**,764**	,139	,014
good service quality	**,812**	,049	-,008
quality accommodation	**,788**	-,064	-,117

Extraction Method: Principal Component Analysis.
Rotation Method: Oblimin with Kaiser Normalization.

a. Rotation converged in 16 iterations.

In terms of the affective image one factor with an eigenvalue greater than 1 was retained. Slightly more than 39% of item variance was explained by this factor and as seen in table 5 a variable was created which represents the 'holistic' evaluations of the affective image.

Table 5 Affective Image Component Component Matrix[a]

	Component
	1
describe Cyprus (boring - exciting)	,576
describe Cyprus (common - distinctive)	,561
describe Cyprus (unsafe - safe)	,625
describe Cyprus (inferior- luxurious)	,699
describe Cyprus (inhospitable- welcoming)	,663

Extraction Method: Principal Component Analysis.

a. 1 components extracted.

Based on the results of hypotheses testing the following points are concluded:

a) The first cognitive image component of Cyprus which represents 'attractiveness' is affected by the purpose of visit [$F(2, 225)=2.5$, $p=.029$]. Also, as seen in table 6 only 'age' has a significant relationship with the first (attractiveness) and second (activity) cognitive image components, indicating that the tourism product promotion should be segmented (Shin, 2009).

b) 'Past experience' influences the first component of the cognitive image (attractiveness), 'travel agent' influences the third component (holiday) whereas 'past experience' and 'advertising' influence the affective component (holistic). This indicates that people travelling for a 'sea and sun' holiday are largely influenced by their travel agent; past experience seems to influence the cognitive and affective image more than other sources while advertising has an affective appeal in people as it evokes feelings (table 7). This implies that

policy-planners must strengthen cooperation with tour operators and target repeat tourists.

Table 6 Multiple Regression Coefficients

COG1	B	SE B	β	R^2	Sig.
Model 1					
Constant	-0.435	0.158			
Age	0.012	0.004	0.197	0.039	*0.003*
COG2					
Model 1					
Constant	0.295	0.155			
Age	-0.009	0.004	-0.144	0.021	*0.034*
COG3					
Model 1					
Constant	0.571	0.273			
Gender	-0.260	0.137	-0.130		
Travel with children	0.001	0.193	0.000		
Educational level	-0.004	0.087	-0.003		
Marital status (widowed)	-0.198	0.171	-0.090		
Age	-0.011	0.005	-0.176	0.041	0.106
AFF					
Model 1					
Constant	-0.015	0.212			
Age	0.003	0.003	0.061		
Gender	-0.168	0.101	-0.085		
Educational level	-0.044	0.064	-0.038		
Marital status (widowed)	0.149	0.145	0.065		
Travelling with children	-0.044	0.153	-0.016	0.013	0.498

significance level = (p<0.05)

Table 7 Multiple Regression Coefficients

COG1	B	SE B	β	R^2	Sig.
Model 1					
Constant	-0.117	0.078			
Past Experience	0.385	0.141	0.178	0.032	*0.007*
COG2					
Model 1					
Constant	0.177	0.197			
Friends/family	-0.173	0.195	-0.086		
Travel agent	0.071	0.266	0.021		
Advertising	0.290	0.392	0.056		
Media	-0.186	0.254	-0.055		
Past experience	-0.247	0.204	-0.114		
Other	-0.052	0.278	-0.014	0.013	0.815
COG3					
Model 1					
Constant	-0.050	0.068			
Travel Agent	0.522	0.222	0.154	0.024	*0.019*
AFF					
Model 1					
Constant	-0.071	0.063			
Past experience	0.234	0.113	0.108	0.012	*0.040*
Model 2					
Constant	-0.097	0.064			
Past experience	0.254	0.113	0.117		
Advertising	0.591	0.292	0.106	0.023	*0.016*

significance level = (p<0.05)

c) Perceived image varies with the number of previous visits [r=0.167, n=146, p<0.044], indicating that tourists travelling to Cyprus frequently have more positive perceived images. This might be explained by the fact that frequency of travel allows for greater exploration of the destination.

Table 8 Multiple Regression Coefficients

COG1	B	SE B	β	R^2	Sig.
Model 1					
Constant	0.268	0.124			
Accommodation only	-0.365	0.176	-0.205	0.042	*0.040*
COG2					
Model 1					
Constant	-0.497	0.970			
Accommodation only	0.352	0.980	0.182		
Accommodation B/B	0.692	1.014	0.224		
Accommodation HB/FB	0.457	0.983	0.229		
Excursions	0.331	0.529	0.067		
Other	1.142	0.748	0.165	0.056	0.357
COG3					
Model 1					
Constant	-0.120	1.039			
Accommodation only	0.386	1.959	0.184		
Accommodation B/B	-0.279	1.087	-0.083		
Accommodation HB/FB	0.101	1.054	0.047		
Excursions	-0.942	0.567	-0.176		
Other	0.476	0.801	0.064	0.077	0.178
AFF					
Model 1					
Constant	-0.342	0.944			
Accommodation only	0.272	0.952	0.145		
Accommodation B/B	0.326	0.969	0.121		
Accommodation HB/FB	0.448	0.953	0.237		
Excursions	0.212	0.410	0.047		
Other	0.110	0.569	0.017	0.013	0.875

*significance level = (p<0.05)*

d) In terms of the way the holiday package was distributed only 'self-catering accommodation' had an association with the first component of the cognitive image (attractiveness), indicating that those selecting 'self-catering accommodation' have a lower perceived image (table 8). This suggests that self-catering accommodation units need to be improved.

Perceived Image

Respondents' perceived image was measured through a series of questions including 'what characteristics the destination has to offer' and 'how would you describe Cyprus'. The aim of such questions was to obtain respondents' perception of the destination using attitudinal descriptors and to observe the type of characteristics attached to Cyprus. In terms of characteristics it was found that 'good weather' (95.4%), 'beaches' (92.9%), 'traditional restaurants' (61.6%) and 'entertainment' (52.5%) were preferred, indicating that respondents perceive Cyprus as a typical 'sea and sun' destination (figure 2).

Figure 2 Destination Characteristics
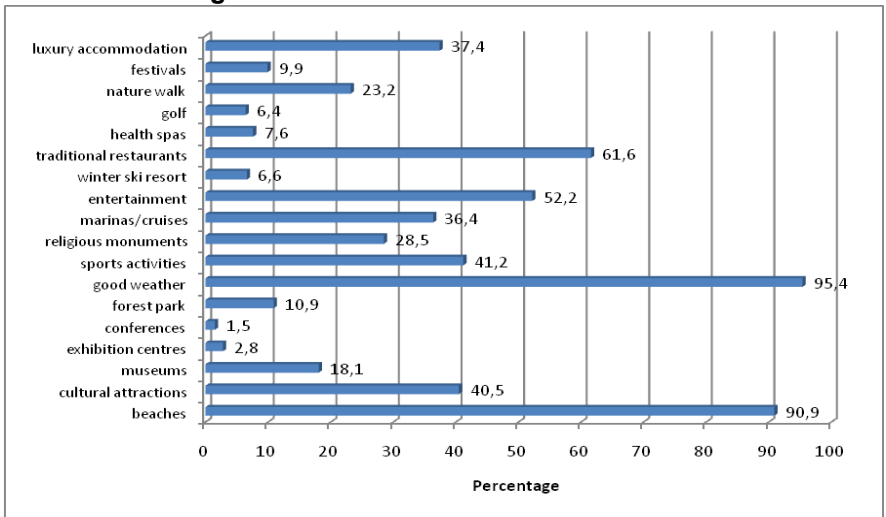
Moreover, when asked to rate Cyprus in terms of bipolar scales respondents rated Cyprus high in terms of 'safety', 'excitement' and 'hospitality' but gave lower rates for 'luxury' and 'distinctiveness' showing that they do not perceive Cyprus as being a luxury or unique destination (table 9).

Table 9 Cyprus Descriptors

Descriptors	Mean Value	Standard Deviation
Boring – Exciting	6.09	0.96
Common – Distinctive	5.43	1.33
Unsafe – Safe	6.30	1.18
Inferior – Luxurious	4.04	1.49
Inhospitable – Welcoming	5.50	1.73

Note: Scale values ranged from 1 (highest) to 7 (lowest); the lower the mean value the highest the agreement with the negative descriptor

Perceived image was also measured through an open-ended question whereby the respondents were asked to describe the destination. Respondents' descriptions were based primarily on destination attributes and included both positive and negative perceptions. The three most popular positive descriptors were typical 'sea and sun' characteristics such as 'good weather' (46.3%), 'friendly/hospitable' (38.8%) and 'good beaches' (14.4%) whereas the three most negative descriptors were 'expensive' (8.6%), 'unclean' (1.4%) and 'unfriendly' (1.2%). When asked to offer suggestions regarding the improvements to the Cyprus tourism product respondents said 'better value for money' (34.7%), 'better infrastructure' (9.9%), 'better public transport' (8.3%), 'cleaner environment' (5.9%) and 'better activities and/or greater variety of activities offered' (5%). When asked to express their satisfaction, 91% of respondents claimed to be satisfied with 76.6% stating they would most likely return and 86.8% saying they would recommend the destination to others.

Evaluation of Destination Attributes

According to Dmitrovic et al (2007), measures of image such as perceived quality and value for money influence satisfaction level.

Hence, respondents were asked to rate the destination in terms of overall quality and value for money. It was found that overall quality (5.37) was rated higher than overall value for money (4.40). Specifically, 'restaurants', 'accommodation facilities', 'natural environment' and 'entertainment' were rated more positively in terms of value for money while 'public transport', 'infrastructure' and 'shopping facilities' were poorly rated. In terms of quality, 'restaurants', 'accommodation facilities' and 'natural environment' were rated positively while 'public transport', 'infrastructure' and 'entertainment' were rated poorly (table 10). This indicates negative perceptions regarding infrastructure quality.

Table 10 Mean Values for Destination Attributes

Attributes	% of Respondents		Mean Value		Standard Deviation	
	VFM	QUAL	VFM	QUAL	VFM	QUAL
Public transport	43%	46%	3.29	3.17	1.06	1.06
Accommodation	87%	88%	3.91	3.93	0.83	0.82
Natural environment	95%	94%	3.77	3.75	0.83	0.84
Cultural Attractions	83%	84%	3.66	3.66	0.83	0.86
Activities Offered	88%	89%	3.71	3.69	0.84	0.76
Infrastructure	83%	83%	3.47	3.46	0.80	0.81
Entertainment	91%	95%	3.77	3.53	0.92	0.85
Shopping Facilities	94%	92%	3.45	3.73	0.89	0.89
Restaurants	98%	98%	3.97	4.01	0.90	0.80

Note: Scale values ranged from 1 (very bad) to 5 (very good); the lower the mean score the lower the rating respondents gave to each tourism product attribute
*The responses missing were from tourists that did not use one or more of the attributes above

When asked to rank destination attributes according to importance respondents ranked 'weather', 'accommodation' and 'atmosphere' as the three most important with 'transportation', 'cultural attractions' and 'sports facilities' ranked as the least important three. It appears that respondents perceive typical 'sea and sun' holiday elements as being of

primary importance with culture and variety of activities viewed as less important (table 11).

When asked to agree with certain statements about Cyprus respondents agreed more with the statements that Cyprus has a 'good weather', 'relaxed atmosphere', 'friendly people' and 'excellent beaches' and less with the statements that Cyprus has 'good sports facilities', offers 'good value' and has 'attractive towns' indicating that respondents' perception of Cyprus revolves around typical 'sea and sun' characteristics that could be emphasised as strengths of the destination.

Table 11 Destination Attributes ranked according to Importance (n=381)

Attributes	Mean Value	Standard Deviation
Weather	1.81	1.70
Accommodation	4.06	2.14
Atmosphere	4.81	2.48
Residents' friendliness	5.07	2.66
Value for money	5.09	2.89
Nightlife	5.17	3.36
Service quality	5.66	2.42
Availability of activities	6.38	2.83
Scenery	6.68	3.15
Transportation	8.18	2.44
Cultural attractions	8.19	3.04
Sports facilities	8.84	2.73

Note: Scale values ranged from 1 (most important) to 12 (least important); the lower the mean score the higher the importance placed by respondents on the attribute

Table 12 Agreement with statements of destination attributes
(n=390)

Statements	Mean Value	Standard Deviation
Cyprus has a good weather	4.72	0.50
Cyprus has a relaxed atmosphere	4.33	0.60
Cyprus has friendly people	4.11	0.82
Cyprus has excellent beaches	4.20	0.82
Cyprus offers good service quality	3.95	0.74
Cyprus has quality accommodation	3.96	0.79
Cyprus has a beautiful scenery	3.89	0.80
Cyprus offers lots of activities at night	4.03	0.76
Cyprus offers lots of activities during the day	3.83	0.72
Cyprus has attractive towns	3.71	0.78
Cyprus has good sports facilities	3.65	0.94
Cyprus is of good value	3.21	1.16

Note: Scale values ranged from 1 (strongly disagree) to 5 (strongly agree); the lower the mean score the lower the agreement of respondents to statements

CONCLUSIONS

This research paper compared the projected and perceived images of Cyprus. In terms of the projected image it is concluded that despite Cyprus' efforts to reposition itself as a quality destination significant differences exist between the projected and perceived images of Cyprus as respondents continue to perceive Cyprus as a 'sea and sun' destination. It is thus clear that destination image is difficult to alter. Hence, it is recommended that tourism marketing strategies be adapted according to the needs of each market segment targeted, that the strengths of the destination be emphasised in promotion, that tourist facilities be upgraded to increase perceived quality and that the projected image coincide with reality.

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