

Elinor Zucchet
ETM

Polar destinations: How to find a successful differentiation?



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Declaration of authorship

I declare that this dissertation is my own unaided work. I have not included any material or data from other authors or sources which are not acknowledged and identified in the prescribed manner. I have read the section in the Student Handbook on Assessment Offences and understand that such offences may lead the Examinations Board to withhold or withdraw the award of Master of Arts.

Date and signature

Abstract

Polar tourism is generally increasing, but some destinations appear to receive more tourist flows than others.

Nevertheless, Polar Regions present the same natural characteristics, and usually offer the same range of products. In this homogeneous context, how can polar destinations find a successful differentiation, in order to be competitive?

This research aims to investigate the literature about Polar Regions, the polar tourism offer, destination management and differentiation, in order to formulate hypotheses that will be tested qualitatively by means of a virtual benchmarking analysis, a focus group and personal interviews with tourist organizations in polar areas.

The analysis of the results will give birth to propositions that will provide an answer to the problematic, divided in four main dimensions and illustrated with concrete examples: fundamental elements of a differentiation, ideas to overcome weaknesses, anti mass tourism as a common denominator and the importance of communication.

Generalized conclusions cannot be stated because of the qualitative aspect of the method and the topic in itself, but these suggestions provide tips or ideas for Polar Regions willing to differentiate, and avenues of research for further investigation on polar tourism, a fancy that is only at the dawn of its development.

Summarizing scheme

Step 1: From the topic to the research question (introduction)

Topic: Polar tourism

Research question: Polar destinations, a need for differentiation?

Step 2: Literature review about polar destinations and differentiation (part 1)

The literature review reveals several dimensions:

- Polar tourism, concepts and definitions, geographical distribution and traditional products
- Typical and distinctive polar tourism products
- Short SWOT analysis
- A need for differentiation
- Key steps and differentiating ideas

Step 4: Empirical research (Part 2 and 3)

Aim: find out how a polar destination can develop a successful differentiation.

Method:

- “Virtual” benchmarking analysis of other tourism destinations that managed to find a differentiation, and possible adaptation to polar destinations
- Focus group with tourism students: Image of polar destinations and choice criteria
- Personal interviews of tourist organizations from different polar areas

Step 3: Choice of a working angle (Part 2)

The literature review shows that many polar destinations offer the same products and need a differentiation process, to be competitive. It points out some hypotheses:

- Polar tourists are different from winter tourists and will never be mass tourists
- Polar regions are trying to develop distinctive products but the offer remains homogenous
- Polar destinations suffer from seasonality, high costs and a lack of differentiation
- Value must be added to existing resources in order to be different and offer a USP
- Creativity is usually not a differentiating idea
- A differentiation based on high prices is possible
- A differentiation can be based on being first, traditional, or trendy
- To be environmentally friendly is not enough to be different
- Differentiation requires sacrifice (on product/service, attribute or target market)

Working angle: Polar destinations: how to find a successful differentiation?

Step 5: Results (part 2 and 3)

- **Polar tourism** is different from winter tourism and will not become mass tourism
- **Polar regions do suffer** from seasonality, expensiveness and a lack of differentiation
- **Very successful differentiating ideas:** high prices and tradition
- **Can be successful:** creativity, being first, trendiness
- **Less successful:** environmentally friendly
- **Added value and USP** are necessary to differentiate
- **Apparition of new elements:** the combination of different tourism types and the easy access as differentiation ideas

Step 6: Proposals (Part III and conclusion)

How to find a successful differentiation?

1. **Fundamental elements of a differentiation:** added value (combinations, creativity, access) and USP
2. **Overcome the weaknesses:** bad image (natural obstacles, remoteness, price) and seasonality (event, seasonal products), good communication
3. **A common denominator:** anti mass tourism (winter tourists vs. polar tourists, expensive destinations, risks)
4. **The importance of communication** (positioning and branding)

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Introduction

In a global warming context, it seems that the three S (sea, sun, sand) are no longer the only way of spending holidays. Briefly taking a look at tourism magazines and online reviews, one can notice the presence of many tourism destinations that were not perceived as attractive before, and even considered as hostile and frightening a century ago: Finland, Northern Canada, or the Antarctica...(Mommens and Grenier, 2005)

Polar destinations present the same natural characteristics: snow, ice, Arctic and Antarctic wildlife, midnight sun, polar night, northern lights, etc. (The International Polar Foundation, 2003)

Therefore, one can wonder what will make potential polar tourists chose between Swedish, Norwegian or Finnish Lapland, or between Canada and Alaska. Looking at the activities included in any “package trip” to polar destinations, the problem is even harder to solve: dog sledge, snow mobile, or northern lights safaris, the products are very similar whatever the region is.

Although these activities are exciting and there seems to be a real demand for it, how can a potential tourist decide of the place to undertake them? What can help a tourist destination being different from another one for potential visitors?

The literature review will help to apprehend the topic thanks to definitions, as well as an overview of the polar countries and the tourist offer that will reveal, along with a short SWOT analysis, a real lack of differentiation in the polar products. The theoretical differentiation key steps and ideas will provide some hypotheses that will be qualitatively tested in the empirical research, divided in three parts:

- A virtual benchmarking analysis of Mediterranean tourist destinations that appear to have a differentiation, and possible application to polar areas
- A focus group with tourism students above the image of Polar Regions and choice criteria of a polar destination.
- Personal interviews with tourist organizations from different regions of Canada (The Yukon), Iceland (West Iceland), Norway (Finnmark), Sweden (Lapland) and the United States (Alaska).

After a confrontation between the theoretical and the empirical data, some new elements will appear and the third part will attempt to provide an answer to the problematic by means of propositions and avenues of research.

“It is funny, we often talk about the North Pole, less frequently about the South Pole, and never about the West Pole nor the East Pole. Why this injustice? ... Or this oversight?”

Alphonse Alais

An aerial photograph taken from an airplane window, showing a vast, snow-covered landscape with patches of dark forest. The sky is a pale, hazy blue. In the bottom foreground, the white wing of the airplane is visible, with the word "snowflake" and the "SAS" logo printed on it.

Part I, Literature review:

Polar tourism and differentiation

“The world is a book, and those who do not travel only read one page.”

Saint Augustin

Literature review: table of contents

1. Getting familiar to polar tourism

1.1 Definitions

- Polar regions
- Polar tourism
- Polar tourists

1.2 Geographical distribution and traditional products

- The Arctic: The Nordic countries, Northern Canada, Alaska, the North Pole and Northern Russia
- Antarctica

2. Polar destinations: the tourism offer

2.1 The typical polar offer

- Products
- Market

2.2 An effort for distinctive products: the case of Northern Canada

- Auroral tourism
- Polar bears: the ice barrier's king

3. SWOT analysis

4. A need for differentiation

5. Differentiation: key steps

5.1 Previous steps: the three questions: What is there? What is thought to be there? What has been represented as being there?

5.2 "Differentiate or die"

5.3 Communicating the difference: positioning

6. Problematic and hypotheses table

This theoretical part will explore the literature on polar areas, destination managements and differentiation in order to reveal hypotheses that will be tested empirically.

1. Getting familiar to polar tourism

1.1.Definitions

- **Polar regions**

Polar regions can be divided in two major groups (the Arctic and Antarctica) and present the following characteristics: less intense solar radiation, extremely cold temperatures, extreme variations in daylight hours (midnight sun and polar night), northern light phenomena, short summer season, large amount of ice and snow, typical fauna and flora (that varies from the Arctic to the Antarctica.) Unless the Antarctica, that is almost entirely located within the Antarctic circle, the Arctic area is not defined by the area enclosed in the Arctic circle, but by the shifting July isotherm (10°), approximately corresponding to the limit of the tree growth, that is to say that according to this definition, the Arctic area includes the Arctic ocean, Northern Canada, Alaska, Northern Russia, Northern Norway, a part of the Atlantic ocean, Svalbard, most of Iceland and the Bering Sea. (Columbia encyclopedia, 2007). Nevertheless, some of the regions detailed in this work do not correspond to this geographical definition but do present the same characteristics (climate, fauna and flora, natural phenomena...), and will therefore be considered as polar, or circumpolar in this research. (Appendix 1)

- **Polar tourism**

According to Hall, polar tourism is:

All travel for pleasure and adventure within Polar Regions, exclusive of travel for primarily government, commercial, subsistence, military or scientific purposes.

(Hall 1992 cited Stewart et al. 2005, p 6)

It is necessary to distinguish polar tourism from winter tourism. The difference basically resides in the tourist's main motivation. The "polar" tourist aims to reach Polar Regions, located close or beyond the Arctic Circle, the tree line or the isotherm line) and to experiment extreme cold areas, and not only the snow (like in the case of winter tourism). Besides, winter tourism requires important and permanent infrastructures such as accommodation for instance, while polar tourism tends to be more independent and does not necessarily need permanent installations. Finally, most of the polar tourism is organized during the summer, while winter tourism, as its name indicates, takes advantage of the winter season. (Grenier, 2005)

This kind of tourism has been dramatically growing in the past few years. Indeed, in only ten years, the number of tourists arriving to Antarctica by land has increased by 757 per cent, and those arriving by sea by 420 per cent. In the Arctic, the number of visitors has raised by 50% since the 1990s. (UN, 2007) Nevertheless polar tourists still constitute a niche market. Indeed, Polar Regions are expensive to travel to, and above all far away from appealing to everyone. According to Pagnan (2001, p 4), this type of tourism "will never be the kind of mass appeal of, for example, a Rio or a Cancun". The number of visitors to Polar Regions might be small compared to other nature-based tourist destinations, but it is relatively high in comparison to local populations. For example, in Iceland, the annual number of visitors is higher than the number of inhabitants. (Pagnan, 2001)

- **Polar tourists**

Polar tourists usually present the following motivations: observation of polar fauna and expansive wilderness (often ecotourism), remoteness, pristine and majestic scenery, adventurous activities, and sometimes cultural tourism (discovery of new cultures) (Mommens, 2005). They are called “last frontier” and “high end” tourists; they often have high standards and are quite demanding. (Pagnan, 2001) They fit into the special interest tourist category, looking for novelty, quality and experience, seeking the REAL travel (Rewarding, Enriching, Adventuresome and a Learning experience). (Weiler and Hall, 1992) The majority is willing to enjoy new sights, sounds, smells and tastes, and to get a better understanding of the place and its inhabitants. (Tabata, 1989, cited Uzell, 1989)

1.2.Geographical distribution and traditional polar products

- **The Arctic area**

As seen above, the definition of Arctic regions will be broaden in this research, and will therefore include in its continental sector, Europe (Nordic countries), the northern ends of North America (Alaska, Canada, Greenland and the North Pole), and northern Asia (mainly Siberia). (Barrameda, 2007) The Arctic is not managed by a treaty, but belongs to eight nations: Canada, Denmark, Finland, Iceland, Russia, Norway, Sweden and the USA. (Pagnan, 2001) Indigenous population remains present nowadays, with among others the Lapps in Europe; the Samoyedesin Western Russia, the Yakuts, Tungus, Yukaghirs and Chukchis in eastern Russia, and the Eskimo in America. Despite of globalization, many indigenous communities still conserve traditional activities such as hunting, fishing, reindeer herding and the fabrication of crafts. (Columbia encyclopedia, 2007)

- The Nordic countries

The Nordic countries include Norway, Finland, Sweden, Denmark and Iceland. Characterized by a strongly urbanized population, they offer kilometres of unspoiled nature. Because of the cold and dark winters, tourism is quite seasonal, with 70% of the tourism flows concentrated in summer in Sweden and Denmark. (Mespelier and Bloc-Duraffour, 2002) This research will only focus on Iceland and the northern parts of Fennoscandia (Norwegian, Swedish and Finnish Lapland), as the South of this latter does not present polar characteristics.

- Denmark (Greenland)

It is the southernmost of the Nordic countries if the offshore territories are excluded, and it does not present as rough climate conditions as its neighboring Scandinavian countries. Nevertheless, if we include the off shore territories (Greenland and Feroe Islands), Denmark can be included in polar destinations. The main traditional polar tourist products are hikes in the world's biggest national park of Northeast Greenland, dog sledge excursions, visit of fishermen settlements and luxury cruises along Greenland's shore (the most famous are the Hurtigruten cruises) (Greenland official national guide, 2007)

- Norway

Among all the traditional Norwegian tourist products, one can underline the Hurtigruten cruises, as mentioned above. Originally created to link the cities of Trondheim and Hammerfest (Coastal express), and offering an incomparable view of the fjords, the world wide famous cruise company has broaden its routes and offer cruises along the Norwegian's shore, but also to Antarctica and the Arctic (Spitzberg archipelago and Greenland). Although other companies offer cruises to the same destination, the

Norwegian company Hurtigruten is without a doubt the leader of the cold water cruises sector. (Saval, 2007)

- Sweden

Swedish Lapland traditionally offers experiences of Lappish culture, with visits of reindeer herds, Lappish settlements or ice fishing. Sweden is also famous for its Ice Hotel (Jukkasjärvi) and the Absolut Ice Bars, now present in any many capitals of the world. (Ice hotel, 2007)

- Finland

Finnish Lapland is known worldwide for its Santa Claus village, in Rovaniemi, attracting 500 000 visitors a year. Each Christmas, families from all over the world fly there and spend a total of 20 million Euros to visit Santa Claus' village and to experiment the Christmas atmosphere, with its snow, reindeers, treasure hunts on Santa Claus' tracks but also its souvenirs shops, hotels, and of course post office where children can write their letter to Santa. (Abc luxe, 2004)

But this success story also presents drawbacks. Indeed, the extreme seasonality creates high and costly needs for infrastructures, material and personnel, but during two months, with only three weeks of peak period. Now the principal challenge for Finnish Lapland is to reduce the frequentation gap between December and the rest of the year. The Lapland Regional Council would like to increase the annual night demand by 2% for the domestic market, and by 4% for the foreign market. (Grenier, 2006)

- Iceland

Iceland traditionally offers geyser, glaciers, volcanoes and whale watching, as well as thermalism thanks to the numerous hot springs. (Mespelier and Bloc-Duraffour, 2002)

- Northern Canada

The main tourist areas of Northern Canada are the following: North West territories, Manitoba, Nunavut and the Yukon. All these areas have a tradition of fishing and hunting tourism. Visitors appreciate the wide, expanded and unspoiled nature. (Jiménez Abad, 2003)

- Alaska

Alaska is traditionally famous for the historical gold route, its pipeline, the glacier bay and the highest mountain of the American continent, Mont Mac Kinley. (Mespelier and Bloc-Durauffour, 2002)

- The North Pole

Unlike the South Pole, located in the middle of a land mass, the North Pole is located in the middle of the Arctic Ocean and has no land but only drifting ice. The North Pole and the Arctic Ocean are considered international territories, although some countries have made claims, and Russia even recently planted a flag under the sea. (Arte Info, 2007) Mainly departing from Oslo (by plane to Longyerbyen), Anchorage or Ottawa, a few itineraries offer cruises on ice breakers and a one-of a kind exploration of the North Pole and surroundings.

- Northern Russia

Remote, offering little cultural attraction and with one of the roughest climate on the planet, Northern Russia (especially Siberia) receives little tourism flows. The main tourist attractions are the transiberian railway, connecting Moscow to Vladivostok (7400 kilometers in a week), and hunting tourism, with big animals such as Kamchatka bears, wolves, and moose. Kamchatka peninsula has become the most famous area of

Russia for hunting tourism. (Russian hunting agency, 2007) It is also necessary to underline the effort made since the end of the Russian economy's collapsing, to develop ecotourism in protected areas of Russian Lapland and Siberia. (Mespelier and Bloc-Duraffour, 2002)

- **The Antarctica**

- Peculiarities

The Antarctica is “the only continent on earth that has no indigenous population, and that does not belong to any nation”, (Science Poles, 2005, 1 68-69) and the least visited continent. Another peculiarity is that, without any indigenous population, visitors are both foreign and domestic tourists, since the continent does not belong to anyone. (Bauer, 2001)

- Tourism

The Antarctic Treaty, signed in 1959 and ratified in 1991, limits and controls all the activities on the white continent. Indeed, tourism is often justified by the economical benefits it brings to the local population. Of course, this justification cannot be used in Antarctica, and one can think that all the benefits go directly to the tour operators and that tourism has no economical or social impact, but only environmental impact on the continent. (Bauer, 2001) For that reason, tourism to Antarctica has always been an issue, but although many countries were against any tourist activity, more and more cruises (departing from Southern Patagonia and Australia) go around Antarctica and sometimes allow visitors to step the ice barrier and visit scientific bases. Tourism to the Antarctica can be divided into five main categories:

- High altitude overflights, which do not land within the Polar Regions

- Large cruise liners, which visit polar regions as part of an itinerary, and which make few landings because of the size of the boats and the capacity of passengers
- Specialist polar cruises in ice-breakers, which make frequent landings
- Land-based activities with access by aircraft
- Small private expeditions, sometimes with an expedition or environmental aim.

(Buckley, 2003)

The International Association of Antarctic Tourism Operators obliges the tourist companies to respect the Antarctic Treaty, to maintain a respectful behaviour and to warn scientific bases of their venue. In 1996, the abandoned scientific base of Port Lockroy was transformed into a museum, post office and souvenir shop, receiving 7000 lucky visitors a year. So far, the presence of the tourists has not been proved to be a threat to the ecosystem, probably because only a few boats stop on the continent, and because all the tourists spend the night on the boats. (Jiménez Abad, 2003)

Because Antarctica presents itself as “foreign and “forbidden” to nearly all who visit, the visitor/tourist can experience a magical quality unknown nearly everywhere else on Earth

(Splettstoesser et al., 2004 cited Singh, 2004, p 27-28)

2. Polar destinations: the actual tourism offer

2.1. The typical polar offer

▪ Products

Although some countries are famous for a product in particular (supra), tour operators generally offer the same kind of activities whatever the polar destination is: dog and reindeer sledging, snowmobile, northern lights excursions, ice fishing, cruises, wildlife

safaris (the fauna differs from one area to another), ice hotels and visit of traditional houses (Inuit, Sami, etc.). Iceland slightly differs, offering besides geothermal activities thanks to the hot springs and geysers. The Antarctica is also specific, only allowing a few visitors to step the continent, visit scientific bases and closely observe the penguins. This research will not deal with the Antarctica, since this continent does not belong to any nation, does not have indigenous inhabitants and therefore does not need tourism as an industry for the local economy. This study will be focused only on the Arctic area.

▪ Market

Prices are generally not indicated on the websites, but arctic tours are quite expensive, ranging between 1500 and 5000 Euros in the brochures and catalogues. The trips are more often addressed to “travellers” than “tourists”, and use a selected vocabulary:

Table 1: Frequency of words most used on polar-specialised tour operators' homepages

T.O.	<i>Arctic discovery</i>	<i>Seiviaggi</i>	<i>Grand Nord</i>	<i>Polar cruises</i>	<i>Arctic adventure</i>	<i>Arctic safaris</i>	<i>Arctic experience holidays (Discover the world)</i>
Words							
Adventure/adventurer	2		1	5			
Experience (“know-how” and the experience lived during the trip)	1	5		3	2	2	1
Quality	1	1		2			1
Dream	1		2	1	3	3	
Safety/security				1	1	1	1
Tailor-made, sur-mesure	1	2		1			1
World		1		3			2

Source: own elaboration based on seven polar tourism-specialised tour operators' websites

This short analysis shows that polar products tend to target a market with quite high standards and income, for which elements as quality, experience and tailor-made are

essential. Indeed, one of the advertising campaigns for the luxury brand Rolex uses the image of polar explorers. (Appendix 2)

2.2. An effort for distinctive products: the case of Northern Canada

In this homogeneous context, some destinations came up with innovative or specialised products. Northern Canada has developed alternative and specialised products in the past few years.

- **Northern lights : alternative and specialised products**

Northern lights have been fascinating many people for centuries. Originally considered as “fox fire” by Lappish legends, they are scientifically explained by the collision between charged particles emitted by the sun with the magnetosphere. (Ovenell-Carter, 2007) Nowadays, auroral tourism is an important part of polar tourism.

- Areas and market

In many Northern regions of Canada, the northern lights represent an important part of the tourism industry. Presenting a competitive advantage compared to Alaska since September 11th and thanks to an interesting exchange rate for international travellers, Northern Canada is developing its northern lights industry. Within one decade, auroral tourism was multiplied by 20. In the North West territories, northern lights tourism created 172 jobs, and brought 12 316 tourists that spent 19, 9 million dollars of direct expenses, during the season 2000-2001. According to the report made by the General Direction of resources, fauna and economic development of the North West territories, these numbers are dramatically increasing every year. (Tourisme en ligne, 2004)

Churchill, Manitoba is considered the best spot of the world for northern lights activity and offers the possibility to comfortably wait for them in the heated Aurora Domes, an

old national research observatory. “Churchill is to northern lights what Broadway is to musicals”. (Ovenell-Carter, 2007, 1 1-2)

Japanese are particularly fascinated by northern lights. (Appendix 3) Indeed, a Japanese belief assumes that direct exposition to northern lights stimulates fertility and creates a beneficial effect for the body. (Chrétien and Péloquin, 2006)

Other Asian legends say that a child conceived under a northern light will be a boy. (Morin, 2006) Therefore, many Japanese couples decide to spend their honeymoon at polar destinations. This market is especially interesting since each visitor spends an average of \$500 a day. (Chrétien and Péloquin, 2006)

Canada appeals to Japanese tourists, especially the area of Yellowknife and Whitehorse (Yukon), famous for their northern lights activity. So far, the only problem is the lack of infrastructure and the difficult access (Japanese visitors have to change flight three times, and fly during 16 hours within two days). The lack of access is a considerable obstacle, since Alaska, the main competitor, already managed to bring the company Japan airlines directly to the city of Fairbanks, with three flights carrying 300 passengers. Within the first three months, all the flights were full. These flights were put into place only for northern lights tourism, which underlines the importance of this market. (Tourisme en ligne, 2005)

- Alternative accommodations

Northern lights can occur more than 200 nights a year in the best spots, and visitors have a great chance to see one. But when it is -30°C, it is not so easy to stay outside waiting for the sky to start the show. Fortunately for the tourists, some solutions were found. Besides the northern lights excursions, where tourists are provided with thermal clothes, alternative accommodations were developed especially for the phenomenon. (Appendix 3) Such accommodations can be found in Finland (northern lights alert and

glass igloos) and Alaska (Aurorarium and wake up calls in case of auroral activity). (Unusual hotels of the world, 2007)

Canada still does not offer specialised accommodation for northern lights, which could be an idea for future alternative products.

- **Polar bear : the ice-barrier's king**

The area of Churchill, Manitoba (Canada) offers good possibilities for polar bears observation, and is considered one the best spots of the world for bear watching tourism. Indeed polar bears congregate there in October and November to wait for the sea to freeze and to hunt the seals of Hudson Bay. Several operators offer polar bears tours, including transport (bus, helicopter, and tundra buggies), accommodation (hotels and lodges) and activities. Originally based on fishing, Churchill's economy now highly depends on tourism, but because of global warming and conflicts with tourists (bears attracted by litter), the polar bears of Churchill are threatened. (Buckley, 2003) Indeed, already 10,000 tourists were coming to Churchill every year to watch the polar bears in 1994, and filled the forest with special buggies and buses. (Rosing, 1994)

3. Polar destinations: short SWOT analysis

This short SWOT analysis (strengths, weaknesses, opportunities and threats) highlights the main assets and challenges polar destinations have to face when developing a tourism activity.

- **Strengths**

- Strong consciousness of the necessity to protect the environment since the beginning of the tourism development (a lot of actions are undertaken)
- Pristine sceneries

- Rich and specific fauna
- Wide open spaces (Pagnan, 2001)
- **Weaknesses**
 - Limited access, remote areas (Pagnan, 2001)
 - Lack of tourist infrastructure, and unequally used throughout the year
 - Short tourist season (3-4 months) that sometimes result in saturated sites-
winter tourism is not widespread, except for Nordic countries that have
specialised products (Grenier, 2006)
 - Dangerous destinations (extreme conditions, rescue can take a while to
come...)
 - Expensive destinations-infrastructure expensive to maintain because of
weather conditions, remoteness and seasonality (Pagnan, 2001)
- **Opportunities**
 - Most of the polar destinations are in a stage of development on the
destination life cycle (Butler et al., 1980 cited Seaton and Bennett, 2001)
 - Growing concern for ecotourism and sustainable development (Pagnan,
2001)
 - Today's tourists are less passive, seeking in a destination both activities and
experiences that are Rewarding, Enriching, Adventuresome and a Learning
experience-the REAL tourism (Read, 1980 cited Howie, 2003)
 - Climate changes : more and more people look for fresh air

▪ **Threats**

- A bad tourist management could result in considerable damage for the environment and therefore, for the main tourist attribute (Pagnan, 2001)
- Competition between polar destinations: difficulty to differentiate the offer (Grenier, 2006)
- Unpredictable weather (storms in spring for example)
- Climate changes, melting ice (Pagnan, 2001)

4. A need for differentiation

As seen in the SWOT, one important threat for polar destinations is the competition, because of the difficulty to differentiate the offer. (Supra) As part of the explanation, Plog (2000 cited Pike 2004) considers that similarities are increasing between destinations because of globalization.

As a result, countries become interchangeable in the tourist's mind. Whether he is looking for good beaches, restful forests or old cities, it becomes relatively unimportant to him where these happen to be found.

(Cohen, 1972 cited Pike, 2004, p 115)

Nevertheless, according to Emerson (19th, cited Montgomery and Porter, 1991, p 27):

If a man...make a better mouse-trap than his neighbour, tho' he build his house in the woods, the world will make a beaten path to his door.

This quotation is especially relevant for polar destinations, often remote and difficult to reach. It is therefore essential to offer something unique. Besides, the consumer of today makes choice based on "whether the product represents an exciting new concept-a desirable experience". (Howie, 2003, p 153)

Grenier (2006) considers most of the products offered by polar destinations as “homogeneous” and “hard to differentiate”, as discussed also in the analysis of the traditional offer of polar products. (Supra)

According to Porter (1980 cited Pike 2004), find and communicate a competitive advantage is especially important when the industry is made of close substitutes. Indeed, as seen above, the SWOT analysis revealed a competition threat, because of the difficulty for polar destinations to differentiate their offer.

In his book about Destination Marketing Organizations, Pike (2004) uses the example of sun and sea tourism, inferring that a picture taken on a beach could have been taken on a lot of other beaches around the world. Nevertheless, some beaches managed to become worldwide famous and different from others in the mind of many people, for instance Ibiza, the international nightlife stage, that will be discussed in the benchmarking analysis. It can be difficult to make the difference between a picture of a snowmobile excursion taken in the white scenery of Finnish Lapland or Alaska. In this context, Chrétien and Péloquin (2006) affirm that polar destinations should not only count on their natural assets, but also use their audacity and originality. Ries and Trout (1986 cited Pike, 2004) encourage marketers to think in terms of “differentness” rather than “betterness”.

5. Differentiation : key steps

Differentiation is part of the marketing mix, and the differentiation process should be used when creating the right product. (Seaton and Bennett, 2001)

5.1.Previous steps : The three questions

First of all, the destination willing to find a differentiation should try to identify and analyse its appeals to the market, as well as one or several competitive advantages, that is to say what is special, or even unique, to the destination. According to Seaton and Bennett (2001), this involves answering three questions:

- What is there?
- What is thought to be there?
- What has been represented as being there?

▪ What is there?

The first question aims to identify the destination resources (physical: natural or man-made, socio cultural, infrastructure, accommodation). To make it more concrete, one can use the example of a polar destination: Swedish Lapland, and try to identify some of its resources:

- Physical (natural): low mountains, lakes, northern lights, snow, midnight sun...
- Physical (man-made): Sami churches and tents, reindeer farms...
- Socio cultural: Sami folklore, outfits, handicrafts
- Infrastructure: Airports (Kiruna), roads, bus transportation, taxis, railway lines...
- Accommodation: Youth hostels, camps, hotels, ice hotel...

An inventory of the attractions, ordered by categories and visitor numbers, is one way to identify these resources. (Seaton and Bennett, 2001)

These resources can easily be controlled and quantified, and can represent a good starting point for a differentiation process. Nevertheless, Crouch and Ritchie (1999, cited Howie, 2003) consider that in order for a destination to have a competitive advantage, value must be added to the existing resources, since economic and natural

resources can be present at other similar destinations, for instance weather, sea and beaches in Mediterranean countries.

There is one element that could be perceived as added value, but more difficult to control, because of its intangibility: the spirit of place, made of ambiances and atmospheres. (Howie, 2003) This “spirit of place” can be helpful to find a differentiation, if the destination is able to identify and describe it as unique. Indeed, according to Howie (2003, p 104):

When considering a destination, the potential tourists imagine themselves in that destination and consider their likely experience.

Kozak (2004) speaks about selling a unique and distinctive experience at a destination rather than its resources.

▪ **What is thought to be there?**

Once the destination knows what is there, it has to verify if people is aware of it. The second question is indeed referring to the destination image. “A destination image is the sum of ideas and impressions that a tourist prospect holds about a destination.” (Seaton and Bennett, 2001, p 362)

Thanks to a quantitative or/and qualitative survey, the destination should be able to answer to the following questions:

- What is the perceived destination image held by the customer or potential customer?
- Is it favourable?
- Is it different from perceptions of what is thought to exist in competitive destinations?
- How can it be affected?

The third question is particularly relevant in this research, since it is dealing with differentiation and competitive advantage.. The research will focus on this aspect, and not on the image promotion aspect, that could be a topic in itself for another study.

The image of a destination can be positively or negatively affected by stereotypes (Seaton and Bennett, 2001). One example of positive affection could be the Caribbean, perceived by many people as dreamy islands, a sunny paradise where life is easy. This stereotype appeals to millions of visitors that stay in resorts, do not see the poverty of the inhabitants, and keep the stereotype when they leave. A negative example could be Norway, perceived as expensive, cold and dark by Spanish (personal communication with Bocci L. from Innovation Norway, April 16 2007).

- **What has been represented as being there?**

In addition to the inventory of resources, the destination can also make an inventory of what has been represented as existing (Seaton and Bennett, 2001) and compare both inventories.

The use of the three questions explained above can help a destination to find a valuable and realistic differentiation. In the case of Swedish Lapland, the natural physical resources could be the same in any polar country. Nevertheless, the socio-cultural and manmade can be considered as unique, as they mainly concern the Sami culture. Although Sami people are still present in other Nordic countries, their differences of language and legislation resulted in different forms of development. (Müller and Pettersson, 2001) Besides, the comparison of these unique resources (“what is there”) with what is represented as being in Swedish Lapland reveals that Sami are quite present in tourist brochures, as shows the table below.

Table 2: Representation of Sami culture in tourist brochures, 1998

Feature	Number of pictures
<i>Reindeer</i>	40
<i>Traditional costumes</i>	18
<i>Handicrafts</i>	16
<i>Sami tents</i>	15
<i>Sami flag</i>	3
<i>Total</i>	92

Source: Müller and Pettersson, 2001

5.2. “Differentiate or die”

According to Trout (2001), differentiation is the key of today and tomorrow’s marketing, since the offer is constantly increasing. Nevertheless, it is important to make the difference between ideas that are differentiating, from the ones that are usually not.

- **Creativity is usually not a differentiating idea**

According to Trout (2001) creativity is not a differentiating idea. Indeed, most of the companies nowadays, especially in the tourism sector, use creativity in their promotion. Emotions are very important in selling products or services in the tourism sector, but they should not be used at the expense of the realistic attributes of what is sold. The doctor Carol Mood explains that only young children present a totally emotional behaviour. Most of the consumers indeed evaluate first the rational attributes of the product and service, and then react to emotions. In other words, without evaluation, there is no emotion. (Trout, 2001)

- **Price is usually not a differentiating idea**

A differentiation based on price leadership is only successful in a few cases, for very generic products for instance. In the tourism sector, low cost companies seem to be quite successful on that respect, although many competitors arrive every day on the market, and many go to bankruptcy.

In destination managing, it appears very hard to base a differentiation on low prices. This is usually a very short term strategy, often bound to failure.

Nevertheless, a differentiation based on prices is possible, but with high prices. In the mind of many people, high price means better quality, if:

- The difference of quality is somehow visible and/or if
- The expensive products or services bring prestige (Trout, 2001)

In the case of polar destinations, one can think about cruises to the Antarctica for example. Only accessible to very few tourists a year, this product is expensive, for its uniqueness, and the high prestige that goes with it.

- **To be first is a differentiating idea**

Even though it is difficult to avoid copies or imitation afterwards, to be first can be a differentiating idea. Indeed, people tend to think that the first to develop a product or service has more knowledge and experience than the followers. It also associates an idea of innovation and originality to the company's or destination's image. (Trout, 2001) The Ice bars are a good example. The very first one was the Absolute Ice Bar in Swedish Lapland, built along with the first Ice Hotel, and then exported to Stockholm. Finland also developed an Ice Bar, in Helsinki, but called the Finlandia Ice Bar, named after the national vodka. The Ice Hotels were copied in many countries as well, but are

they as popular as the Swedish one? This question will be discussed in the empirical research.

- **Tradition is a differentiating idea**

Tradition can be a differentiating idea, if it is no synonym of obsolete, and manage to cohabite with modernism. Nowadays, and in our societies, people are demanding tradition and authenticity. (Trout, 2001) The case of Sami tourism in Swedish Lapland is a typical example of tourism based on traditions. (Supra)

Traditions also include famous characters (real or fictional), more and more employed nowadays by destinations. (Trout, 2001) In the case of polar destinations, one can think of Santa Claus. Many children were told that he lived in the North Pole. And suddenly, Finland managed to convince the whole world that he lives in Finnish Lapland.

- **To be trendy is a differentiating idea**

Even though being trendy does not last forever, this should be communicated by:

- Comparing sales (for tourism destinations, maybe the number of visitors) to the competitors'
 - Using the sector evaluation by recognized organizations (if it is positive of course)
 - Using experts (especially in the tourism sector, a lot of potential customers carefully read guides and magazines' reviews to chose their next holidays)
- (Trout, 2001)

- **Is it a difference to be environmentally friendly?**

It can be but it is certainly not enough, since nowadays everyone pretends to be environmentally friendly. In any case, the company or destination has to fulfil three conditions:

- Find, or create, a wish from customers to pay more for environmental quality
- Establish credible information about the environmental attributes of the product or service
- Try to find an innovation that cannot be imitated by competitors.

(Trout, 2001)

Nowadays, it appears essential and almost compulsory to be environmentally friendly, especially in the case of nature-based destinations such as most of polar countries. But it is not sufficient and should be completed by other differences.

- **Differentiate often requires sacrifices**

Those sacrifices can be gathered in three groups:

- Products/services sacrifice: only focus on one type of products (Trout, 2001)

Indeed:

Consumers don't have time to consider the merits of all available products in a purchase decision, and will therefore appreciate a memorable and focused value proposition.

(Pike, 2004, p 111)

- Attributes sacrifice: focus on one attribute
- Target market sacrifice: focus on one market segment (Trout, 2001)

- **Be different in different places, for different markets**

Globalization is expanding, and more and more companies manage to find universal arguments. But even though the basic product or service is the same everywhere, it is

still essential to adapt to cultural differences in the promotion for instance. (Trout, 2001)

The aurora Japanese market discussed above probably needs a special promotion and service adapted to the Asian culture. (Supra)

5.3. Communicating the difference: positioning

The destination's values and image must be promoted effectively to ensure that potential users are aware of the place's distinct advantages.

(Howie, 2003, p 143)

Once the differentiation is found, the key resides in communicating it. According to Trout (2001, p 63), a "difference is never too communicated".

Indeed, a good positioning has to be reached. In simple words, positioning means "how to differentiate its product or service in people's mind" (Trout, 2001, p 67), meaning to develop a program for people to be aware of the difference.

The most successful destinations are those with brand identities based on enduring values (...) and/or world class heritage icons.

(Howie, 2003, p 154)

Richardson and Cohen (1993 cited Pike 2004) developed a study of the slogans of 46 USA state tourism organizations, based on Reeve's (1961, cited Pike 2004, p 123) concept of Unique Selling Point:

- "The foundation of the hierarchy is that the slogan must be prepositional. (for instance, "Yes !Michigan!" does not propose anything)
- Such propositions should be limited to one or only a few
- The proposition(s) should sell benefits of interest to the market
- The benefit(s) must be unique"

Richardson and Cohen's analysis found out that the slogans of only five states are considered to have a USP:

- Arizona-the Grand Canyon state
- Florida-coast to coast
- Louisiana-we're really cookin!
- South Dakota-great faces, great places
- Tennessee-we're playing your song

This analysis can be applied to the slogans of some polar destinations:

- Canada: discover our true nature
- Finland: naturally
- Greenland: out of this world
- Iceland: discoveries, the whole year around
- Norway: a pure escape

Nature and discoveries are not really unique propositions. Indeed, Pike (2004) analysed the principal themes used by countries' slogans all around the world, and found out that discovery comes second and nature comes third.

This research will not focus on the communication aspect, since it could be a topic in itself for further study.

6. Problematic and hypotheses table

This literature review gives a definition of Polar Regions, tourism and tourists and tends to show that even though polar tourism is far from being mass tourism, the offer is already homogenous. Some destinations are trying to develop distinctive products in order to be competitive, but often have to face problems of costs and seasonality. The literature also provides ideas and keys to differentiate, which have been or could be used by polar destinations, which leads to the following problematic:

How polar destinations can find a successful differentiation?

The literature's exploration reveals the following dimensions and hypotheses, that will be confirmed or infirmed throughout the empirical research:

Table 3: Table of hypotheses revealed by the literature review

Dimensions	Hypotheses (variables)
Polar tourism, regions and tourists	Polar and winter tourists are two different types of tourists.
	Polar tourism will never be mass tourism
	Polar regions are trying to develop distinctive products
Weaknesses	Polar regions suffer from seasonality
	Polar destinations are expensive
	Polar regions suffer from a lack of differentiation/the offer is homogeneous and products are hard to differentiate
Differentiation ideas	Creativity is usually not a differentiating idea
	A differentiation on prices is possible with high prices
	To be first can be a differentiating idea
	Tradition can be a differentiating idea
	To be trendy can be a differentiating idea
	To be environmentally friendly is not enough to be different
Necessities to differentiate	Value must be added to existing resources (natural for instance)
	Differentiation often requires a sacrifice of products/services, attributes or target markets
	The differentiation has to respect the USP criteria

Source: own elaboration based on the literature review

Part II, Empirical research:

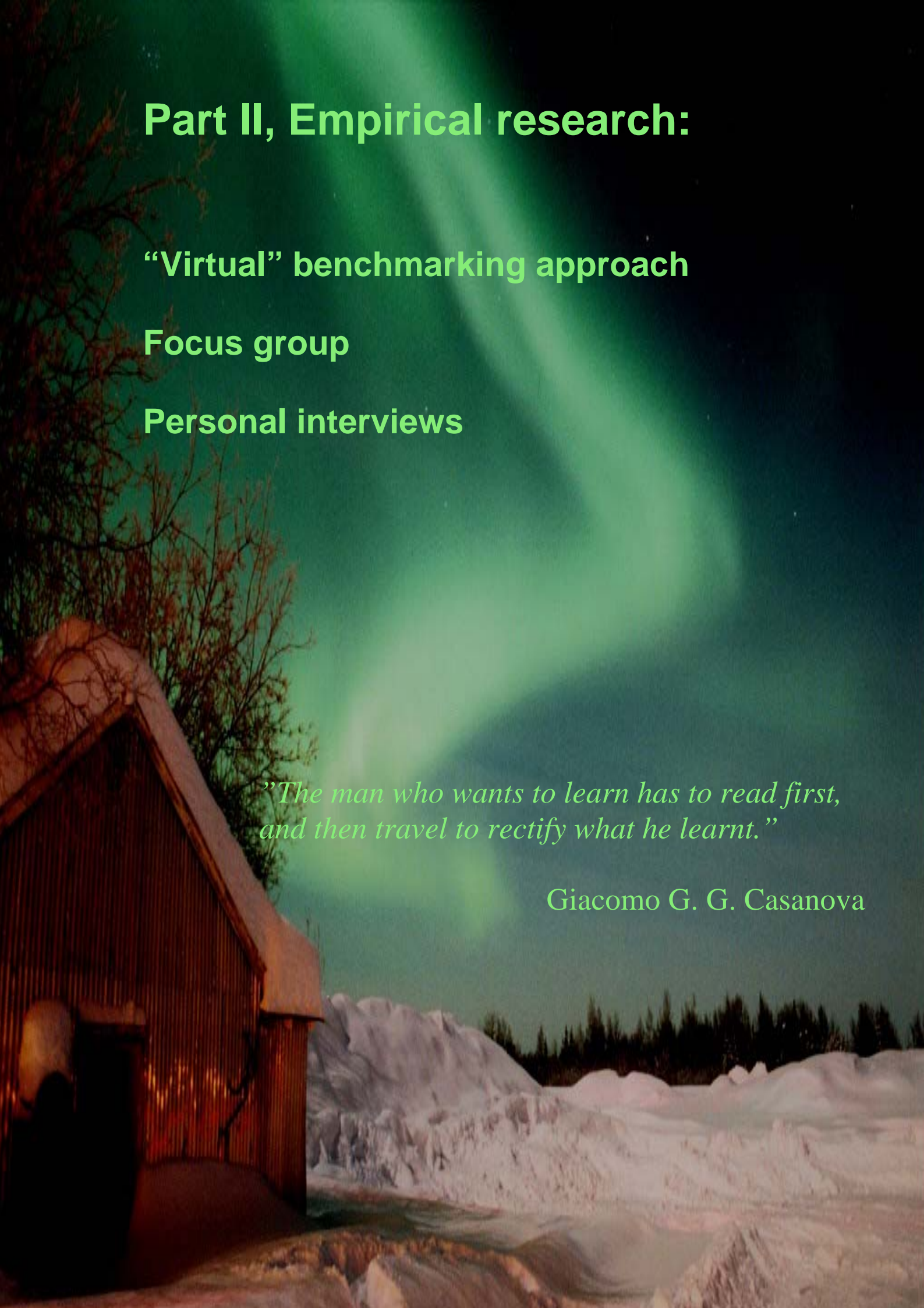
“Virtual” benchmarking approach

Focus group

Personal interviews

*“The man who wants to learn has to read first,
and then travel to rectify what he learnt.”*

Giacomo G. G. Casanova



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3. Summarizing table of empirical data

In this part, a “virtual” benchmarking approach will be realized in order to understand ways of differentiating. As secondary data is certainly not sufficient, primary data will be gathered thanks to a focus group, and the hypotheses revealed by the literature review will be submitted to polar destinations professionals.

1. Secondary data : “virtual” benchmarking analysis of successful destinations that have managed to find a differentiation and possible application to polar destinations

Benchmarking can bring improvements in competitiveness for tourist destinations, in today’s highly competitive tourism market.

A real external benchmarking analysis would use tourist motivation, satisfaction and expenditure level to compare destinations and find out how one can perform better than the others, thanks to quantitative and qualitative data collection and measure. This process would include a mission statement, the choice of a partner destination, quantitative and qualitative data collection, gaps examination, decision of what to benchmark, results presentation and action. (Kozak, 2004)

Although a full benchmarking analysis would be pertinent and useful for polar destinations, for time restrictions reasons we will only realise a short virtual benchmarking approach, to find out how similar destinations managed to find a differentiation, and how these solutions could be somehow adapted to polar destinations.

1.1 Examples of differentiation for Mediterranean sun and beach destinations

This short virtual benchmarking analysis will focus on Mediterranean sun and beach destinations, as these destinations present very similar resources, and therefore had to face the same problem than polar destinations: how to find a differentiation? Some sun and beach destinations achieved to find a competitive differentiation, and communicated it effectively.

- **Spain**

Spain in general is a good example of a successful differentiation. Spain as a whole managed to position as a party country, and its nightlife is worldwide famous. Indeed, according to a study on international country brands, Spain arrives number 9 for beach destinations (after countries such as Fiji, Maldives or Thailand), and number 2 for nightlife right after the United States. (Future Brand, 2005) Spain found a differentiation towards the other Mediterranean country, but also within the country.

- **The Balearic**

The Balearic Islands opted for an interesting differentiation based on target markets. Indeed, Ibiza still appeals to young partiers from the whole world, famous for its nightclubs and DJ's, but all the other islands have well geographically defined target market. Over the past few years, the island of Mallorca has become a second Germany, with its German streets, beers, restaurants, bars, second homes and low cost airlines connecting Germany to Palma de Mallorca. (Personal communication with Alabern R. from IBATUR, May 22 2007)

The island of Formentera clearly has an Italian clientele, looking for higher standards and authenticity, whereas Menorca seduces English visitors, with regular low costs flights from England to Mahon.

- The coasts

Spain nearly offers 4000 km of coast (Sastre, 2001), but still managed to differentiate each part of its littoral, thanks to different names that clearly refer to natural resources that inspire images and atmospheres to the potential visitor's mind: Costa Brava (the wild coast), Costa Dorada (the golden coast), Costa del Sol (the sunny coast), Costa Blanca (the white coast), Costa del Azahar (the orange blossom coast), Costa Tropical (the tropical coast), Costa de la Luz (the coast of light)...

Despite this original idea, some coasts suffered from the mass tourism of the 70's. Leaving aside the environmental consequences, mass tourism destinations such as Benidorm (Costa del Sol), now suffer from the competition with cheaper destinations, such as Turkey, Morocco, Bulgaria or Croatia. Indeed, when countries are only famous for sun and beaches, they often chose to compete on prices, and this solution is hardly ever successful on the long run. Destinations have to underline other aspects, such as culture, gastronomy, arts or landscape, to differentiate. (Neault, 2004)

- **France**

- The French Riviera

Since the 19th century, the French Riviera has been synonymous of elegance and luxury. High prices, jet setters, crystal clear sea and a taste of Provence are the

components of the French Riviera offer. The tradition begun with the English visitors during the 19th century around the city of Nice, but today the main highlight is the Movie festival of Cannes. Cannes, which used to be a small coastal town, is now once a year the stage of one of the biggest movie festival in the world.

- Languedoc Roussillon

Many coastal areas of Languedoc Roussillon chose a mass tourism, and these destinations present today the same problems than Spanish similar destinations, that is to say competition with cheaper mass tourism destinations. (Supra) These regions based their difference only on prices, and should now look for other ways to differentiate.

1.2 Examples of adaptation to polar destinations

This part aims to virtually adapt the differentiation strategies of the Mediterranean countries to polar destinations. Some ideas will be detailed in the last part, as suggestions and ideas.

- **Target markets**

As the Balearic Islands, some polar destinations could also focus on a certain geographical target market, for instance the region of Fairbanks, Alaska, that developed direct flights from and to Japan (supra), could become the specialist of aurora tourism for Japanese visitors, adapting its products and services to this market.

- **Differences based on unique natural resources**

Following the example of Spain and its coasts, some polar regions could focus on their natural assets and communicate it. Norway already applied this concept with its “fjord of dreams”, a name that was totally made up for tourism. (Personal communication with Bocci L., April 16 2007) In Siberia, the Kamchatka peninsula offers unique volcanoes, (some in a national park classified world heritage by the UNESCO), that could be communicated as a regional icon. The examples are numerous, especially for polar destinations that are highly based on nature.

- **Special event**

A sport or cultural event always stimulates tourism. If this event becomes worldwide famous, like the Cannes festival, the name of the area becomes associated to it. The snow festival of Kiruna (Swedish Lapland) is not worldwide famous but could be developed in order to gain popularity and develop tourism in Swedish Lapland, often in competition with Finnish Lapland and its Santa Claus Village.

2. Primary data

2.1 Presentation and justification of the method

A qualitative research is appropriate since the topic is not measurable, and aims to understand the differentiation process, to answer to a “how”.

Qualitative research methods are suitable for addressing questions of how and why things occur.

(Carson et al. 2002, p 66)

Although some general facts can be stated, the answers greatly depend on each case and a qualitative research is more adapted to obtain an in-depth and concrete point of view.

By the very nature of the subject, managerial performance and activities within organizations cannot be adequately studied within neatly arranged compartments in isolated and artificial settings.

(Fetterman et al. 1989 cited Carson et al. 2002, p 64)

This qualitative research is divided in two steps, in order to globally apprehend the topic and have two different views:

- Focus group with tourism students
- Personal interviews with polar destinations tourist organizations.

2.2 Focus group with tourism students: how would they choose a polar destination and what image do they have?

A focus group was helpful in order to empirically explore the topic before the personal interviews and obtain some results from another point of view. This focus group was conducted during an hour with eight tourism students from the Netherlands, Germany and France, aged between 22 and 28 years. The tourism students already have a foot in the tourism professional world but also represent potential customers for tourist destinations.

A focus group is beneficial to:

- Obtain general background information about a topic
- Stimulate new ideas for further research
- Diagnostic problems
- Generate impressions (Carson et al. 2002)

Besides, this method takes advantage of the group dynamic, synergy and interaction, valuable yet totally absent components of the personal interviews method.

The analysis of the qualitative data follows the structure of the focus group. (Appendix 4)

▪ **Introduction**

A brainstorming about polar destinations reveals three categories: activities (dog sledge, ice fishing, ice hotel, Santa Claus), natural elements (ice, snow, northern lights, seals, sea lions) and words often associated to negative feelings (darkness, emptiness, loneliness, boring), although darkness and emptiness can be positive for some people. Cold can even be perceived as positive, because although many people do not like when it is too cold, some others visit a region especially because it is cold, for the challenge.

The participants perceive snow as an essential element of a polar country, although the definition of Polar Regions is personal. “For instance, Spanish people can consider Stockholm as polar” (female, 26, focus group).

The “game” aiming to see if participants are able to identify the polar countries where some pictures were taken shows that some destinations are easily identified and linked to images: (Appendix 5)

- Finland: Santa Claus
- Sweden: ice hotel (several participants ignored the presence of ice hotels in other countries)
- Norway: cliffs and fjords
- Alaska: architecture similar to the rest of the United States in the cities
- Iceland: hot water (none of the participants mentioned the word: geyser)
- South hemisphere: penguins
- Canada: polar bears

Other pictures are less evident to guess, such as icebergs in Greenland and Antarctica, dog sledging in Russia, Sami people in Sweden, Lappish church, northern lights in

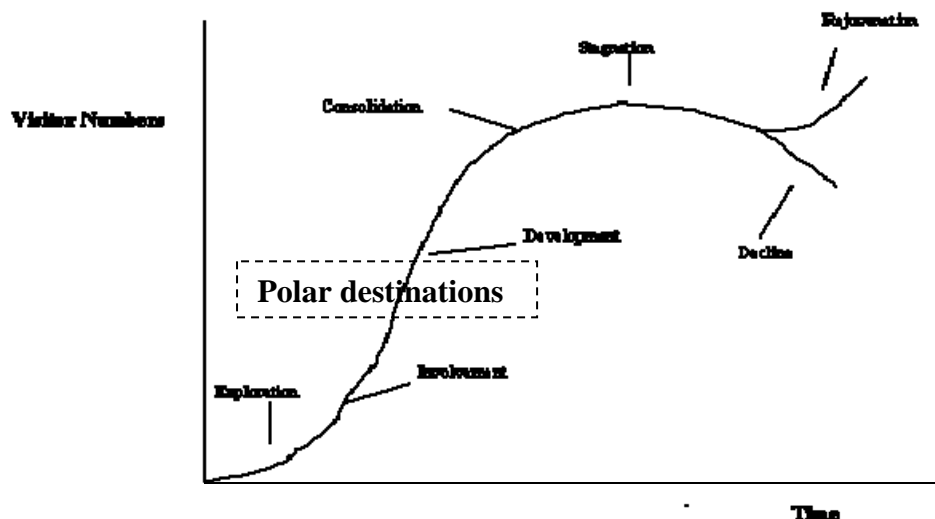
Alaska, bear hunting salmon in Alaska, or ice hotel in Québec. The participants think that these pictures could be taken somewhere else in the polar world.

- **Getting to the topic**

All the participants consider that demand for polar tourism is increasing, since people are looking for something different, experiences, are “fed up of the sea” (female, 23, focus group), and also because of the climate change.

The participants would place polar tourism between new trends (exploration) and growth (development) on the destination life cycle.

Figure 1: The destination's life cycle



Source: Butler 1980 cited Raglan 2002

They are asked to name other polar destinations than the ones they saw on the images and mention Russia, Patagonia, Eastern Canada but also Japan and Kerguelen Islands.

- **The topic**

The participants are asked to pick a polar destination, if they had to visit one, and to justify their choice.

Patagonia is mentioned three times, for the following reasons:

- Combination of several elements (polar and non polar activities, Chile is very extreme)
- Landscape
- Far away from Europe
- Penguins
- The South Pole sounds more interesting to visit than the North Pole
- Spanish speakers

Norway is mentioned twice, for:

- The landscape (fjords, combination of mountain and sea)
- The food
- Advertising

The Antarctica is mentioned once, because “if I go to a polar destination then it has to be really polar”. (Male, 23, focus group)

Russia is also mentioned once, because of its different culture.

Finally, Iceland is mentioned once for its typical hot springs, proper to this country and impossible to find somewhere else.

Then the participants are shown a variety of leaflets from different Polar Regions and have to pick their favourite only for the front-page. (Appendix 6)

The two “winners” are Iceland and Swedish Lapland, both selected twice.

The Iceland leaflet corresponds to what the participant had in mind about the country and is “aesthetically nice”. (Male, 23, focus group)

The Swedish Lapland leaflet is picked for its modernity (in opposition to the Finnish Lapland one, considered as too old fashioned) but also because there are no human being on the front page, and it corresponds better to the polar image that when there are

a lot of people (like the Iceland leaflet, where several persons watch the Northern lights).

Finnish Lapland is picked once because the participant would personally like to spend Christmas there. Antarctica is also selected once, for the baby penguins. One participant chooses Norway for its colours, and finally Manitoba is mentioned for its originality and contrast between modernity (cell phone) and tradition (fishing).

The participants can establish differences between polar destinations, thanks to the symbols usually associated to the countries, such as hot springs for Iceland, fjords in Norway and glaciers in Patagonia. They also mention the presence of different animals in different places, such as the penguin in the South hemisphere. Some destinations are considered to offer more sports, like Canada with fishing and skating on the lakes. Some destinations, like Sweden, are considered both traditional (for the Sami culture and all the tourist products linked to it) and modern (for the invention of the Ice Bar).

Some participants that never went to the Nordic countries cannot establish differences between Norway, Finland and Sweden. All the participants mention the fact that seasons are the other way around in the South atmosphere, and that landscapes and inhabitants vary. “The ones that eat raw fish (identified as Inuits by another participant) could be used for tourism advertising.” (Female, 26, focus group)

For the participants, some polar destinations, like Northern Europe, Canada, and Patagonia, receive more tourists than other such as Russia, considered as the least touristic because of its lack of development, promotion, interest in tourism, and complexity to get there (visa, lack of infrastructure within the country). They identify Moscow and Saint Petersburg as the only tourist places. Norway is considered popular

for the European and Japanese markets. One participant considers Antarctica as very touristic, while another affirms that the number of visitors is very limited there.

According to the participants, polar activities are numerous, such as dog sledging, fishing, skiing, climbing, glaciers, ice skating, swimming in Iceland, snowmobile, hiking, photographing, canoeing, cruises, jumping from the rocks (base jumping in Norway), sauna, and drinking.

They can also easily name polar dishes (salmon, haring, caviar, blueberries, lingonberries, vodka, beer, potatoes), but nobody would go to a polar destination for the gastronomy.

The participants hardly ever hear about polar tourism, and only for sports.

▪ **Conclusion**

In their plans for their next holidays, polar destinations are not mentioned. Nobody is against a visit to a polar destination, but nobody would select it as a first choice and would rather go somewhere else. According to them, the main obstacles to tourism in polar destinations are:

- The cold weather
- The difficulty to find somebody that wants to go with you
- The price (of the trip but also of the equipment)
- The bad image (emptiness, darkness, nothing to do)
- The lack of advertising
- The fact that many people do not consider these destinations as potential tourism destinations and believe it is hard to get there

2.3 Personal interviews of polar destinations professionals

This step is necessary to gain an in-depth and professional point of view, thanks to personal interviews with the following polar destinations professionals:

Table 4: List of the interviewees

<i>Organization</i>	<i>Location</i>	<i>Name and function of interviewee</i>
<i>Tourist board</i>	Finnmark, Norway	Torunn Rorvik, product manager
<i>Tourist board</i>	Gällivare (Lapland), Sweden	Titti Bergman, Visitors/ entrepreneurs assistant and head of projects
<i>Information and promotion centre</i>	West Iceland	Hrafnhildur Tryggvadóttir Manager
<i>Convention and visitors bureau</i>	Anchorage, Alaska	Rachel Sperry Information and Events specialist
<i>City of Whitehorse</i>	Whitehorse, Yukon, Canada	Harmony Hunter, Tourism & Economic Development Assistant

Source: own elaboration

For geographical reasons, these directive interviews were telephonic or by e-mail, and this is a limit since they lose in quality and richness. (Appendix 7) The analysis of the collected data was done thanks to the following methodological table using the dimensions and hypotheses revealed by the literature review, as well as a comparative matrix. (Appendix 8)

Table 5: Methodological table used for the analysis of the qualitative data

Dimensions and variables	Content and quotation
Polar tourism, regions and tourists	
Polar and winter tourists are two different types of tourists.	
Polar tourism will never be mass tourism	
Polar regions are trying to develop distinctive products	
Weaknesses	
Polar regions suffer from seasonality	
Polar destinations are expensive	
Polar regions suffer from a lack of differentiation/the offer is homogeneous and products are hard to differentiate	
Differentiation ideas	
Creativity is usually not a differentiating idea	
A differentiation on prices is possible with high prices	
To be first can be a differentiating idea	
Tradition can be a differentiating idea	
To be trendy can be a differentiating idea	
To be environmentally friendly is not enough to be different	
A new idea: combination of tourism types	
New element: the access as a competitive advantage	
Necessities to differentiate	
Value must be added to existing resources (natural for instance)	
Differentiation often require a sacrifice of products/services, attributes or target markets	
The differentiation has to respect the USP criteria	

Source: own elaboration based on the literature review

- **Polar regions and polar tourists**

- Polar tourism is different from winter tourism

All the interviewees agree that polar tourism is different from winter tourism. They define polar tourism a “very exotic tourism in areas difficult to access” (personal communication with Bergman T., July 22 2007), different from the most common tourist destinations, referring to certain regions.

Polar tourist are people that actually like to go North, winter tourism could be anywhere in the world. (...) I can go skiing in British Columbia or I can go skiing in France. (Personal communication with Hunter H., July 25 2007)

In a nutshell, polar tourism has a geographical definition, whereas winter tourism has a seasonal definition.

- The evolution of polar tourism

They all believe that tourism in Polar Regions will grow in the years to come, and some regions expect their number of visitors to increase dramatically, like the Yukon in Canada or Finnmark in Norway. Indeed, they all locate their destination in the growth (development) stage of the destination life cycle.

There is so much room and potential here that we are going to be in the growth stage for many years to come (...) we have already been in that stage for a while. (Personal communication with Hunter H., July 25 2007)

Nevertheless, four interviewees out of five are convinced that polar tourism is too exotic and expensive to become mass tourism, and that it will never grow “to the level of lazy sun travelling.” (Personal communication with Bergman T., July 22 2007)

- An effort to develop distinctive products?

Most of the interviewees have noticed an effort from their destination’s operators to develop distinctive products and to distinguish themselves. As examples, dog sledging

and northern lights tours are mentioned twice, and snowmobile safaris, igloo hotels and trekking with reindeers are mentioned once.

- **Weaknesses**

- Seasonality as a common problem

All the destinations interviewed suffer seasonality problems, with most of the visitors coming in summer, even though some destinations, like Gällivare in Swedish Lapland, consider themselves as winter destinations. The seasonality problems could be solved thanks to appropriate marketing and promotion along with an increase of services (shops, transports, access...) during shoulder and winter seasons.

- Polar destinations are expensive

The unanimity of the interviewees considers their destinations as “more expensive than other options.” (Personal communication with Sperry R., July 22 2007) Nevertheless, Finnmark (Norway) and Gällivare (Sweden) have average prices compared to the rest of their country, and accommodation in Alaska is cheaper than in other big American cities. Ms. Hunter explains the high cost of certain activities and restaurants by the price of shipping and handling, since the Yukon does not have a port. Visitors to Iceland, Alaska and the Yukon’s are in great part fairly well off. Ms. Sperry also mentions the transport as expensive, since the cities are spread apart.

- A lack of differentiation between polar destinations?

Mses. Hunter and Rorvik admit that their destination’s tourism offer (respectively the Yukon, Canada and Finnmark, Norway) is similar to its competitors (for the Yukon Alaska, British Columbia and Alberta and for Finnmark, Finnish and Swedish Lapland, Iceland and Svalbard.)

Nevertheless, all the interviewees consider their destinations as different from other polar destinations. (Infra)

- **Differentiating ideas**

- Creativity seems to be useful

All the interviewees believe that creativity is useful (and even essential) to differentiate a tourism destination.

Being so far north and not having the advantages of the bigger cities in Canada, you have to be creative up here. (Personal communication with Hunter H., July 25 2007)

Finnmark developed a creative product that has become very popular: king crab fishing:

One person is diving down and the others are standing on the ice waiting for him coming up, and when he comes up he shows the crab and it gets very exciting if he gets any crab (...) they get to hold the crab, they take pictures and after they can eat the same crab. That's our creative product. They could have done it much more boring. (Personal interview with Rorvik T., June 25 2007)

Alaska also used creativity to develop Anchorage's city symbol and ambassador: Seymour, the moose, and the e-mails sent to Anchorage Convention and Visitors Center are answered by a certain "Ask Seymour". (Appendix 9)

- Is a differentiation based on high prices possible ?

Although none of the destinations interviewed has a differentiation based on high prices, all the interviewees believe it is possible, with a specific target market. "I think a destination can differentiate due to high costs. Just look at St Tropez..." (Personal communication with Bergman T., July 22 2007)

Alaska offers expensive tours, attractions and activities.

- Being first, a way to differentiate?

The interviewees' opinion is shared about being the first. On the one hand, Mses. Tryggvadóttir and Mrs Hunter are convinced that being the first to do something can greatly help a destination to differentiate and influence its notoriety. "One idea, which becomes real, can make a difference for a whole area." (Personal communication with Tryggvadóttir H., July 23 2007)

On the other hand, Mses. Rorvik and Bergman believe that people are just looking for new destinations to travel to, and tend not to care who was the first, as long as the "copies keep the same standards" (personal communication with Bergman T., July 22 2007). This latter even considers that it can be more difficult to be the first than to be the seconds.

Ms. Rorvik explains that Finnish Lapland was the first to sell and promote the products now offered by Finnmark, Norway.

- Differentiation can be based on tradition

All the interviewees are definitely convinced that tradition, history, ethnicity or sagas can be differentiating. In Finnmark, the Sami culture (how they used to live and how they live nowadays), and the coast culture (fishing villages) are both greatly used for tourism products.

Alaska and the Yukon are worldwide famous for the gold rush that took place at the end of the 19th century, and propose products around this theme. Along with the traditional visit to historical settings and museums, Alaska also proposes a show where a fictional character, Dusty Sourdough, entertains visitors with his gold rush stories after a dinner in a gold mine. Tourists that visit Alaska are also greatly interested in the Trans-Alaska pipeline and each year, the Yukon quest, an important dog mushing race, attracts many

visitors to the region. This event is based on the Yukon dog sledge tradition and follows one of the gold rush routes.

- To be trendy can help to differentiate...on the short run

On the one hand, three interviewees out of five believe that trendiness can be a differentiating element.

Reykjavík Capital area is trendy, the nightlife and style have been published in the last few seasons, with good outcome. (Personal interview with Tryggvadóttir H., July 23 2007)

Alaska benefited from the adventure tourism trend to launch a new branding for the city of Anchorage and hit another target market than its traditional retired baby boomers: “Anchorage: Big Wild Life”. “We boast everything big here just like your adventure will be.” (Personal communication with Sperry R., July 22 2007)

Ms. Rorvik mentions the possibility for Finnmark to focus on ecological tourism, in order to take advantage of the ecotourism trend.

On the other hand, two interviewees assume that trendiness comes and go, and cannot be used as a long run strategy to differentiate. “Trendy means in my view that next year it is not trendy any longer...” (Personal communication with Bergman T., July 22 2007)

- Environmentally friendly, a difference?

Ms. Rorvik believes that if Finnmark keeps being good at ecological tourism, this will become one of the reasons why visitors will come. Indeed, Finnmark, Alaska and the Yukon are clearly environmentally friendly destinations, with their wildlife, parks and rules. The area of Snæfellsnes, West Iceland was the first area to be awarded with the Green Globe certification as a tourism destination, with the participation of communities and companies. On the contrary, Gällivare (Swedish Lapland) is too far away to be environmentally friendly (mainly for transportation reasons), but some of the local entrepreneurs use the ecological aspect as a selling argument.

- A new idea: combination of different tourism types

The personal interviews reveal a new differentiating idea, which consists in combining different types of tourism at one destination. All the interviewees mention both products based on nature (adventurous products such as dog sledging, northern light tours, hiking, ice fishing, ice climbing...) and culture (tours to the mines, historic tours, museums, fishermen villages, Sami settlements...) “Finnmark tourism is based on nature and culture, that’s our main mission”. (Personal communication with Rorvik T., July 25 2007) Mses. Sperry and Hunter identify the combination of the city (Anchorage and Whitehorse) and nature as a competitive advantage.

Whitehorse is a decent size city, with all the amenities that you can ever need, but then two minutes outside you are in the wilderness. (Personal communication with Hunter H., July 25 2007)

Finnmark also has a competitive advantage towards its main competitors, Finnish and Swedish Lapland: the combination of sea-based products such as fishing villages, king crab fishing, cruises, fjords, etc. and inland products such as hiking, skiing, dog sledging, snow mobile, etc.

- New element: the access as a competitive advantage?

Finnmark and Iceland clearly benefit from the easy access as a competitive advantage. Indeed, Mrs Rorvik mentions the transport several times: the opening of the road to the North Cape during the whole year, the proximity from Oslo, and the development of the transport infrastructure in the region. Ms. Tryggvadóttir also identifies the easy access the whole year round as West Iceland’s main competitive advantage. The city of Anchorage is also easily accessible, middle point between Alaska’s northern and southern visiting point. Alaska also boasts having the most air traffic in the country. On

the contrary, Ms. Hunter considers the remoteness of the Yukon as an asset for differentiation.

It's the whole experience of even coming to the Yukon that makes it distinct. We are far North, that's a difference. (Personal communication with Hunter H., July 25 2007)

Nevertheless, she mentions the direct flights from Frankfurt to Whitehorse in summer.

- **Necessities to differentiate**

- Do natural resources need added value?

The interviews tend to show that natural resources are sometimes sufficient to create a difference, with a touch of imagination. For instance, Finnmark has the king crab as natural resource and made a distinctive product out of it, king crab fishing. (Supra)

Along the nature based products, Anchorage offers the leisure and culture of other American big cities. Anchorage also used its wildlife (natural resources) to create the city symbol, Seymour the moose. (Supra) Indeed, the surroundings of Anchorage host a population of more than 1600 moose.

The Yukon took advantage of its natural resources in winter to develop a famous event, the Yukon Quest. (Supra)

- Does differentiation require a sacrifice?

Finnmark, West Iceland, Gällivare (Swedish Lapland) and Whitehorse (Yukon) did not have to sacrifice any attribute or target market. Ms. Tryggvadóttir adds "not yet". (Personal communication with Tryggvadóttir H., July 23 2007)

However, Alaska decided to focus on a few different target markets among the wide range of possibilities, such as well-off retired baby boomers or sports and adventure visitors. One example of a campaign clearly not targeting everyone was an ad featuring a license plate saying Alaska, B4UDIE (= before you die).

- The USP criteria has to be respected

Nearly all the destinations interviewed appear to have a Unique Selling Point.

Finnmark has a combination of coast and inland products, which is not unique in the world but relatively unique towards its main competitors. (Supra)

Gällivare offers early snow compared to its main competitors, and the direct proximity of the mountain Dundret.

Alaska clearly focuses on the “big” aspect, with the biggest national park of the United States, the biggest mountain of North America, the biggest king salmon ever fished, the biggest concentration of glaciers, and of course the new Anchorage branding. (Supra) “I think we are quite unique in what we offer”. (Personal communication with Sperry R., July 22 2007)

The Yukon Quest could be considered as a Unique Selling Point in winter. Even so, Ms. Hunter considers the pristine wilderness as the Yukon’s most distinctive aspect.

3 Summarizing table of empirical data

Table 6: Summarizing table of empirical data

Dimensions and variables	Secondary data (Virtual benchmarking analysis)	Primary data	
		Focus group	Personal interviews
Polar tourism, regions and tourists			
Polar and winter tourists are two different types of tourists.			Yes Polar: extreme, certain regions Winter: anywhere, season, more accessible
Polar tourism will never be mass tourism		Demand increasing But polar image=emptiness	Will increase but not become mass tourism. Growth stage.
Polar regions are trying to develop distinctive products			Yes (theme tours, accommodation...)
Weaknesses			
Polar regions suffer from seasonality		Cold weather as an obstacle	Yes, more visitors in the summer.
Polar destinations are expensive		Yes (trip + equipment)	More expansive than other choices. Visitors are generally fairly well off
Polar regions suffer from a lack of differentiation/the offer is homogeneous and products are hard to differentiate		A lot of pictures could be taken anywhere (dog sledge, northern lights, icebergs...)	Yes, especially for winter products.
Differentiation ideas			
Creativity is usually not a differentiating idea	Spanish coast's different names	Esthetic and originality can be important	Yes it is, if it helps creating good products
A differentiation on prices is possible with high prices,	French Riviera has a tradition of luxury and elegance	Prestige of going to really polar (extreme) places	Yes
To be first can be a differentiating idea		Swedish Ice hotel and Ice bar are famous	Yes: A good idea can make a difference for a whole area. No: some people do not care who was first
Tradition can be a differentiating idea	Tradition of English bourgeoisie on the French Riviera	Can be too old fashioned but contrast with modernity is interesting	Yes (Sami, gold rush...)
To be trendy can be a differentiating idea	Spanish nightlife, especially Ibiza		Yes, but not on the long run

To be environmentally friendly is not enough to be different			No. Most of the polar destinations use it as a selling arguments
A new idea: combination of tourism types	Combination of sun and sea tourism with culture, nightlife or special events	Combination of tradition and modernity Combination of mountain and sea Combination of polar and less polar products	Combination of nature and culture Combination of inland and coastal products
New element: the access as a competitive advantage	Low costs to the Balearic	Obstacle to tourism in polar destinations: people think they are not easily accessible	Nearly all the interviewees mention the access
Necessities to differentiate			
Value must be added to existing resources (natural for instance)	Nightlife for Spain Culture, gastronomy, arts Special event	Challenge Combination Emotions	Yes. Distinctive products or events combination of nature and culture
Differentiation often require a sacrifice of products/services, attributes or target markets	The Balearic Islands decided to share the market and each island focuses on one geographical market	Norway appeals mainly to the European and Japanese market	Not necessarily
The differentiation has to respect the USP criteria		Destinations having an USP are more easily identified	Yes. (Finnmark, Alaska, Gällivare...)

Source: own elaboration based on the literature review and the empirical research

The background of the slide is a photograph of the interior of an ice hotel. The walls, floor, and ceiling are made of clear, faceted ice blocks. A large, multi-tiered crystal chandelier hangs from the ceiling, casting a warm glow. The architecture features tall, narrow ice pillars and arched openings. The overall atmosphere is cold yet elegant.

Part III, Theoretical and empirical data confrontation :

How polar destinations can find a
successful differentiation ?

*"I have questions to all your
answers"*

Woody Allen

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This part aims to confront the theoretical and empirical data in order to provide an answer to the problematic developed at the end of part I, analyzing the hypotheses revealed by the literature review and the new elements brought by the empirical research.

1. Confrontation of hypotheses and empirical data

1.1 Polar tourism, regions and tourists

- **Polar tourism is definitely different from winter tourism**

The literature review reveals a difference between polar and winter tourism: polar tourism aims to reach Polar Regions, does not necessarily need permanent installations and is mostly organized during the summer. Winter tourism aims to experiment the snow and the season, and require permanent infrastructure. The empirical research totally confirms these hypotheses and put the stress on the fact that polar tourism can only be undertaken in a few regions of the world, and is extreme and exotic, while anyone can be a winter tourist in any area of the globe that has snow in winter.

- **Polar tourism will not become mass tourism**

The literature shows that polar tourism will not become mass tourism, statement shared by the interviewees, who believe it is too extreme and exotic to ever reach the level of sun and beach tourism. However, polar tourism will certainly grow in the years to come, according to the literature, the interviewees and the focus group participants. As seen in part I, Rovaniemi in Finland already receives considerable flows of tourist during Christmas time. The focus group participants consider that polar destinations should not develop too much, or they could lose one of their characteristics: emptiness.

- **A real effort to develop distinctive products**

The exploration of the literature evokes the tendency from Polar Regions to develop distinctive products, like Northern Canada that offers specialized products such as northern light tours for the Japanese market among others, or polar bear watching, with some of the best spots in the world for these two activities. The interviews confirm this tendency, especially around the development of dog sledging, and northern light products.

1.2 Weaknesses

- **Polar regions receive most visitors in summer**

The literature review underlines a strong seasonality problem for most of the Polar Regions. The results of the focus group show that cold weather is an obstacle to visit Polar Regions. Indeed, this could be part of the explanation as the personal interviews reveal that most of the tourist activity in polar areas takes place in the summertime, but marketing actions are being undertaken to enhance winter and shoulder seasons.

- **Polar tourism is expensive**

The theory identifies polar tourists as quite demanding with high standards and income, and the SWOT analysis presents polar tourism as expensive, due to the maintenance of infrastructures, remoteness and seasonality. The interviewees confirm these hypotheses since their visitors are mostly well-off and that they consider their own destinations as more expensive than other options. The focus group participants explain this by the cost of the transport and equipment.

- **The actual offer suffers from a lack of differentiation**

The SWOT analysis part I reveals a lack of differentiation in the polar products, and an actual offer which is quite homogeneous despite the efforts to develop distinctive products. In reality, the results of the interviews tend to confirm this statement, especially for winter products. The focus group results show the difficult identification of the countries where some polar activities pictures were taken.

1.3 Differentiation ideas

- **Very successful**

- High prices

The literature reveals that a differentiation based on high prices could be possible, if the difference of quality is visible and/or the product brings prestige. Indeed, the virtual benchmarking approach refers to the French Riviera, as a destination that cultivates a tradition of luxury and elegance. Some participants of the focus group explain that going to really polar area can be prestigious; therefore people might be willing to pay for this prestige. In addition, the interviewees all believe such a differentiation is possible.

- Tradition

Tradition appears to be a key factor of differentiation. Indeed, it was theoretically supposed to be a differentiating idea, if it managed to cohabite with modernism. The empirical research provides unanimous results. The virtual benchmarking approach mentions the English bourgeoisie vacationing on the French Riviera. Two centuries after, this tradition still appeals to many visitors. During the focus group, some participants criticized an advertisement considered too old fashioned, but appreciated

the contrast between tradition and modernity of Sweden for instance. Finally, all the interviewees are convinced that a destination can base its differentiation on traditions (Sami, gold rush, coastal culture, etc.). The literature also refers to fictional or real characters that can be used to perpetuate a tradition, such as Santa Claus in Finnish Lapland. The results of the interview illustrate this with the example of Dusty Sourdough, the fictional character that tells gold rush stories.

- **Can be successful**

- Creativity

In the literature review, creativity is not supposed to be a differentiating idea, since many companies use it nowadays, sometimes at the expense of the realistic attribute of the product or service sold. However, the empirical data tends to show the contrary. Indeed, the virtual benchmarking analysis mentions the different names of the Spanish coasts, which could be considered as creativity. During the focus group, several participants evaluate the aesthetic and originality as important in promotion. Finally, the interviewees are all convinced that creativity can (and even should) make a difference, giving birth to innovative products and original ideas.

- Being first

In the theoretical part, being first was assumed as a differentiating idea, associating an image of knowledge, experience, innovation and originality to the destination, and mentioning the example of the Swedish Ice hotels and bars. The focus group partly verifies this hypothesis, since the participants totally ignored the presence of Ice hotels in other countries than Sweden. One of them also considers the Ice Bars as a modern asset for Sweden. However, the interviewees are not unanimous on that respect. On the one hand, some believe that being first can definitely differentiate a destination, and on

the other hand some suppose that people do not care who was first, as long as the copies are good.

- Trendiness

While the literature infers that trendiness should be communicated as a differentiating asset and the benchmarking approach evokes Spanish nightlife as a trendy and successful differentiation, the interviewees' opinion is not unanimous on that respect. The main part believes that trendiness should be used to differentiate, while the other considers that it should not be used as a long run strategy. Indeed, the literature mentions the ephemeral character of a differentiation based on trendiness, and recommends the use of experts. This is what Reykjavik did, with several publications about the capital's style and nightlife that obtained good results.

- **Less successful**

- Environmentally friendly

In the theoretical part, the ecological aspect appears to be fundamental to nature based destinations such as polar areas, but not enough to be a differentiation in itself. The regions interviewed are mostly environmentally friendly. Gällivare is not, yet some entrepreneurs use it as a selling argument. This tends to comfort the hypothesis revealed by the literature review. In fact, if most of the Polar Regions are environmentally friendly, this is not a factor of differentiation, unless it presents an added value, such as the Green Globe certification in West Iceland for instance.

1.4 Necessities to differentiate

▪ Essential

- Value added to existing resources

The literature mentions the necessity for tourist destinations to add something else (unique experience, spirit of place, etc.) to their natural assets, which can often be found in other places. The empirical research confirms this hypothesis. The benchmarking analysis uses nightlife, culture, gastronomy, arts and special events as examples of added value. The focus group participants mention challenge, combination of several elements and emotions. Lastly, the interviewees believe in the necessity of having distinctive products, events or the combination of nature and culture to be different.

- USP criteria

The literature review details the concept of Unique Selling Point, which has to be prepositional, limited to one or a few, and selling unique benefits to the market. In the report of the focus group, polar destinations that have a USP (symbols, images) tend to be more easily identified. Most of the interviewees agree on the fact that tourist destinations must offer a competitive advantage, or USP. Norway mentions the coastal products that its main competitors do not have.

▪ Less essential

- Sacrifice

According to the literature analysis, differentiation often requires sacrifices (product, attribute or target market). The benchmarking approach tends to partly confirm this statement, thanks to the example of the Balearic Islands, whose market is different according to each island. Some of the focus group members assume that Norway is

focused on the European and Japanese market. Nevertheless, only one destination interviewed had to make a sacrifice, focusing on a few target markets. The sacrifice of attributes or products is not mentioned at any stage of the empirical research.

2. Apparition of new elements

The empirical research reveals new differentiating ideas, which were not, or partly present in the literature review.

2.1. New differentiating idea: the combination of different tourism types

▪ Tradition and modernity

According to the literature review, tradition should not be obsolete in order to be a differentiating element. Indeed, the focus group participants go further and mention three times the contrast between tradition and modernity as a very valuable characteristic for a polar destination. This contrast is mentioned for an advertisement (Manitoba) that mixes fishing and new technologies, and for another advertisement (Swedish Lapland) that is really modern in its design yet still evokes a pristine wilderness, and finally for Sweden that managed to keep Sami tradition alive while developing innovative products such as the Ice Bars.

▪ Nature and culture

One participant to the focus group would like to visit Norway for its combination of mountain and coastal culture. In fact, the combination of inland and coastal products is one of the main differentiating characteristics of Finnmark. All the other destinations consulted also offer both nature (outdoor activities) and culture-based (museums,

nightlife, historical settings, Sami culture) products. As natural assets are often not enough, polar destinations' cultural heritage can be a good source of competitive advantage.

2.2 The access as a key element to differentiate

The literature refers to the city of Fairbanks, Alaska, which managed to have direct flights from Japan, in order to boost its northern lights products. The empirical research presents the access as a key element to differentiate a destination. The virtual benchmarking analysis points out the development of low cost flights to the Balearic Islands. Besides, according to the conclusions of the focus group, one of the main obstacles to tourism in polar destinations is that many people assume they are not easily accessible. Finally, nearly all the interviewees mention the easy access as a competitive advantage (by road or air).

3. Summarizing table of the confrontation between theory and field

Table 7: Summarizing table of the confrontation between theory and field

<i>Dimensions</i>	<i>Variables</i>
Polar tourism, regions and tourists	<ul style="list-style-type: none"> - Polar tourism is different from winter tourism - Polar tourism will not become mass tourism - There is a real effort to develop distinctive products
Weaknesses	<ul style="list-style-type: none"> - Polar regions receive most visitors in summer - Polar tourism is expensive - The actual offer does suffer from a lack of differentiations
Differentiating ideas	<p>Very successful</p> <ul style="list-style-type: none"> - High prices - Tradition <p>Can be successful</p> <ul style="list-style-type: none"> - Creativity - Being first - Trendiness <p>Less successful</p> <ul style="list-style-type: none"> - Environmentally friendly
Necessities to differentiate	<p>Essential</p> <ul style="list-style-type: none"> - Added value - USP <p>Less essential</p> <ul style="list-style-type: none"> - Sacrifice
New elements	<ul style="list-style-type: none"> - The combination of different tourism types as a differentiating idea - The easy access as a competitive advantage

Source: own elaboration based on the literature review and the empirical research

4. Propositions

The results of the confrontation between the theoretical and the empirical research will provide an answer to the problematic exposed at the end of part I, in the guise of propositions.

4.1 Fundamental elements of a differentiation

- **Added value**

The interviews confirm the lack of differentiation in polar areas. Indeed, all the polar destinations interviewed mention the pristine wilderness, the open space, the nature, as competitive advantages. Unspoiled nature figures among the main motives of polar tourists, but is not enough to differentiate, as all the polar destinations are nature based. It is therefore essential to add value to the natural resources, except if they are really unique, such as geysers in Iceland for instance.

- **Combinations**

Polar tourists are willing to find pristine wilderness and sometimes discover other cultures. (Supra) A good combination of outdoor and cultural activities can therefore answer this demand. A few polar destinations can combine city and nature, such as the Anchorage or Reykjavík areas, which can offer both nature and trendy urban products (nightlife, eating out, and museums). This kind of combinations could particularly appeal to young adventurers, which constitute a growing market for polar destinations. Polar areas that are not close to big cities can as well offer cultural products, such as historical settings (the gold rush), indigenous settlements (Sami, Inuit, etc.) or typical villages (the fishermen villages on the Finnmark coast). This type of combinations could attract less adventurous baby boomers, another important market segment for polar tourism. (Supra)

Polar destinations can also combine tradition and modernity, such as Sweden with Sami products and the Ice hotel, or Norway with fishermen settlements and luxury cruises with all the modern amenities. Polar tourists usually have high standards but seek nature and culture (supra) and therefore could be seduced by this style of combinations.

- Creativity

Creativity is a valuable asset when used properly, that is to say when it is not used at the expense of the realistic attributes of the destination. (Supra) Nowadays, many tourist destinations use creativity, but the empirical research shows that many Polar Regions are still traditional on that respect.

Creativity can be used for innovation and can sometimes result in very distinctive products, such as the king crab fishing in Norway, the northern lights accommodations in Finland and Alaska or the Ice hotel in Sweden. These examples show that natural resources and a touch of creativity can produce added value. Indeed, the Ice hotel might be copied but the fact of being first is positive for a destination's image. Following the example of northern lights accommodation, Churchill (Manitoba) could create products and accommodation around the theme of polar bears.

Creativity can help to transform "classical" products into ludic experiences, such as Dusty Sourdough (the gold rush story teller) or Seymour the moose, in Anchorage. Such ideas are not too difficult or costly to put into place and can make a great difference.

Creativity can also be used in marketing and promotion, to enhance the destination's natural resources and sell dreams thanks to design, originality, emotions etc. Creativity can help to communicate the famous spirit of place (supra) to potential visitors, such as Spain intended with the coasts' names that immediately evoke natural elements and atmospheres. (Supra)

- Access

The access is definitely important for polar destinations, often remote and having an image of "inaccessible" for potential tourists. Roads, flights, railways, all the transports can constitute an added value towards competitors. Northern lights are present at any polar destination, but Fairbanks, Alaska, developed direct flights from Japan and

therefore possesses a significant competitive advantage. Whitehorse, the Yukon's capital, has a direct connection with Frankfurt in summer, and German tourists represent now an important part of its visitors.

- **The USP**

Whatever the added value is, it should respect the USP criteria. Alaska evokes the advertising campaign B4UDIE, which does not respect the USP criterion of proposing something. However, the new campaign: “Anchorage: Big Wild Life” tends to respect the criteria, since it is limited to one proposition (the Anchorage's wild life), it sells benefits of interest to the market (since polar tourists' main motivation is the unspoiled nature) and the benefit is unique. The wild life is not unique to Alaska, but this state boasts having big things, as part of its identity. This slogan can also be interpreted as big wild life in the city itself (nightlife, dynamism, youngness etc.) In reality, Anchorage managed to propose two things in one slogan. (Appendix 9)

4.2 Thinking outside the box, a way to overcome the weaknesses

- **The bad image is not necessarily an enemy**

For a certain target market, “weaknesses” could be used as selling arguments.

- Natural obstacles

Polar destinations have an image of being cold and dark, but since this is true part of the year, why trying to change it? These apparent weaknesses could be perceived as strength for certain people. Indeed, a part of polar tourists look for extreme experiences. If they chose a polar destination instead of a winter destination for instance, they might want to experiment the typical characteristics of these destinations, such as darkness in winter and freezing temperatures. Some adventurers indeed seek the extreme, so the

coldest it is the better. And the darkest it is, the easier it gets to observe the northern lights!

- Remoteness

The Yukon uses its remoteness as a competitive advantage, selling the whole experience of even coming there. In fact, the term polar in itself refers to the extremities of the world, and this is one characteristic that makes polar areas unique for extreme adventure seekers. One of Greenland's slogans was indeed: "Greenland, out of this world". Nowadays it is easier to reach Polar Regions, and polar tourists are less and less considered as explorers. Even so, some are still complicated to travel to, such as Siberia for instance, which could overcome this weakness by selling its unique remoteness and appeal to travelers that like to be considered as explorers rather than tourists.

- Price

Polar destinations are more expensive than other options (supra), but uniqueness has a price and some people are willing to pay for it. Instead of being considered as a weakness, expensiveness can be a guarantee of quality and unique experience. This point will be detailed in part 4.3. (Infra)

- **Seasonality is not a fatality**

Most of the Polar Regions suffer from seasonality and receive the main part of their visitors in summer. But even though this tendency is hard to change, it can be a little influenced.

- Special event

Just like the Cannes festival brings tourists to the French Riviera in spring, some special events can be organized during winter or shoulder seasons. The Yukon Quest attracts

many visitors each year to the area and is unique in the world. Dog sledge races exist in other Polar Regions of the globe, yet the Yukon Quest follows a famous gold route and in a bit more than twenty years, the event has become one of the most important dog mushing races in the world. The Kiruna's Snow festival (Swedish Lapland), on a smaller scale, also organizes dog mushing races and could base its difference on the ice sculptures and activities, typical from an area that gave birth to the Ice hotel concept.

- Seasonal products

Seasonal products can also attract visitors. Along with the usual snow activities such as dog sledging or snow mobile, other products cannot exist in summer. The ice hotels around the polar world are rebuilt every year, since the ice melts. The northern lights cannot be observed in summer because of the midnight sun, and auroral products can help to develop tourism during winter and shoulder seasons. The road to the North Cape, in Norway, was only opened during the summer until three years ago, and since then tourism in winter is increasing. Finland managed to receive an impressive flow of visitors in winter thanks to the Santa Claus village, and unless the other polar destinations, Finnish Lapland now attempts to develop tourism in summer. (Supra)

- Good communication

Any strategy to reduce seasonality has to be promoted effectively. If the products or events cannot exist or take place in summer, it makes them unique in a way and potential visitors should be aware of this difference thanks to an appropriate and focused advertising campaign. Gällivare, in Swedish Lapland, receives most tourism flows in summer yet professionals consider it as a winter destination, and are unable to explain why, but this feeling could be investigated to result in a creative advertising

campaign. Iceland obviously tries to struggle against seasonality with its slogan: “Iceland: discoveries, the whole year around”. (Supra)

4.3 A common denominator: anti mass tourism

As seen above, Polar Regions are in a stage of growth (development) and will not become mass tourism destinations, meaning that they appeal to certain target markets that are looking for exclusive experiences.

- **Winter tourists versus polar tourists**

Winter tourists definitely do not present the same characteristics and motivations than polar tourists. Polar tourism is peculiar and exotic, and these characteristics could be communicated more. The aim of almost reaching the end of the world could be used as a differentiating element. As mentioned before, if one wants to go skiing, one can go to the Alps. It is even possible to mush a dog sledge in several ski resorts of the French Alps, so Polar Regions should underline their geographical peculiarities and their exclusiveness.

- **Expensive destinations: because they are worth it!**

Nowadays people travel more and look for extreme experiences and the prestige that goes with it. And prestige often means expensive. Polar destinations are expensive, but as seen above, it does not have to be a weakness, and can even be a source of differentiation. Indeed, a destination can have high prices, if it manages to justify them by communicating the high quality and/or prestige. Most of the polar tourists are fairly well off and paying more should not be a problem, as long as they know why they pay more. Pristine wilderness, open spaces, emptiness and silence are nowadays considered

as valuable assets by a certain target market, and have a price. Explore the poles, sleep in an ice hotel, fish a king crab, are experiences that do not bring a luxurious comfort but enough prestige and originality to justify their elevated price.

- **Risks**

- Trendiness

Destinations that decide to focus their differentiation on the “anti mass tourism aspect” (after an appropriate market study) should take precautions and not communicate too much their region as trendy. In fact, a trendy destination would attract many visitors and lose its exclusivity. Even though many polar areas still have enough space to welcome important flows of tourists, the image of uniqueness could be affected.

- Eco tourism

For similar reasons, destinations willing to positionate as far away from mass tourism should not insist on their eco friendly aspect. Indeed, nowadays many tourist destinations sell themselves as eco friendly, especially nature based destinations, and the term ecotourism is so employed that it has almost become commonplace. Polar Regions willing to be exclusive should mention their environmental respect (for example, “in harmony with the environment” instead of “ecotourism destination”) but avoid any term that could be linked to less unique tourism. For instance, ecotourism in Costa Rica cannot really be called mass tourism but is not exclusive anymore and figures in any tour operator’s brochure. In a nutshell, the terminology has its importance to cultivate an exclusive image.

4.4 The importance of communication

▪ Positioning

All the suggestions above are only ideas, and a market analysis should be carried out, as well as answering the three questions explained in the literature review: what is there, what is thought to be there and what has been represented as being there before taking any decision. Positioning in its global nature has a fundamental role to play. Indeed, a very good differentiation is totally useless if not communicated effectively. (Supra)

▪ Branding

Branding tends to be successful if it corresponds to the destination's identity (values, symbols). A good branding process can be costly (logo, design, slogan) but is often effective. The examples of successful brandings are numerous: Australia, Spain, the city of Madrid, etc. (Morgan et al., 2004) In the case of polar destinations, Anchorage has developed a city brand around the theme "big". (Infra) Polar Regions present many enduring values (Indigenous culture and beliefs, historical traditions etc.) and symbols (geysers, gold rush, fjords, etc.) that could be used as USPs for a branding process.

Conclusion

Polar destinations appeal to more and more tourists, sometimes almost explorers, seeking unspoiled nature and exotic new surroundings, elements hard to find nowadays. In view of this increasing fancy, the competition between Polar Regions is increasing. Although some polar regions already developed differentiating strategies and innovative products, the offer in general remains homogeneous.

Many polar destinations believe that their pristine wilderness can be a differentiating element. This is certainly an element that differentiates them from other types of tourist destinations, but not from other polar areas. Natural resources are a valuable asset for nature-based destinations such as Polar Regions, but can be enhanced thanks to differentiating ideas that should propose an added value, by means of creativity, combination of different elements, or access facility. The list is not exhaustive, but any strategy should respect the Unique Selling Point criteria.

Thinking differently can also transform polar destinations' main weaknesses into differentiating ideas. Indeed, natural obstacles can be considered as exotic and unique assets for a certain market, and seasonality can be reduced thanks to events, seasonal products and an appropriate communication. Some Polar Regions could also base their difference on their exclusiveness, communicating the fact that they are different from winter destinations and using their elevated prices as a guarantee for prestige and quality, as long as they avoid the commonplace terms such as trendiness and ecotourism.

Finally, any differentiating strategy should be communicated, by means of selected positioning and branding processes.

This research provides an analysis of the polar tourism industry, still little studied, focused on differentiation.

The literature review gives a better understanding of the polar world and tourism, as well as a study of the differentiation process and ideas, adapted to polar destinations thanks to concrete examples.

The empirical study verifies the hypotheses revealed by the theoretical part, through the combination of three different sources of data aiming to gather distinct points of view.

The confrontation between theory and field offers suggestions, risks and examples that could guide, or at least give ideas and tips, to polar destinations tourist organizations willing to develop differentiating strategies and increase their competitiveness.

Because of the innovative aspect of the topic, academic books about polar tourism were not easy to find, yet this weakness could be partly overcome thanks to a wide variety of online articles. The geographical limits also affect the quality of the personal interviews, which could not be realized face to face.

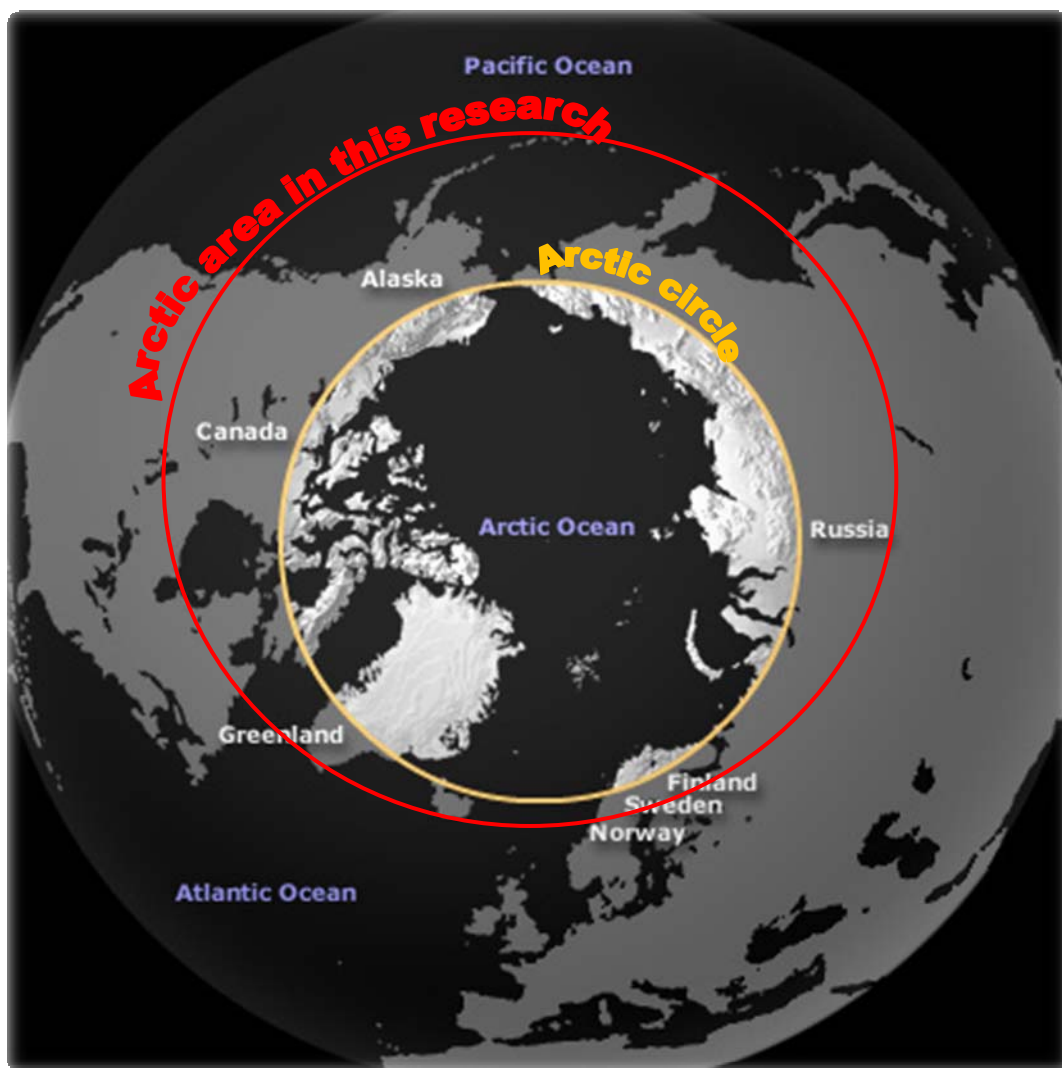
The qualitative method, reduced to eight focus group participants and five interviewees, and the topic in itself do not allow general statements, as the right differentiating strategy greatly depends on each case, but this research could be a starting point for further studies, for instance about polar destinations country branding, or a real benchmarking analysis about destinations differentiating strategies.

Indeed, polar destinations have an incredible potential and offer a fantastic base for differentiating strategies. Polar tourism is only at the dawn of its development and will certainly conquest many travelers in search of breathtaking experiences, in the far reaches of the planet.

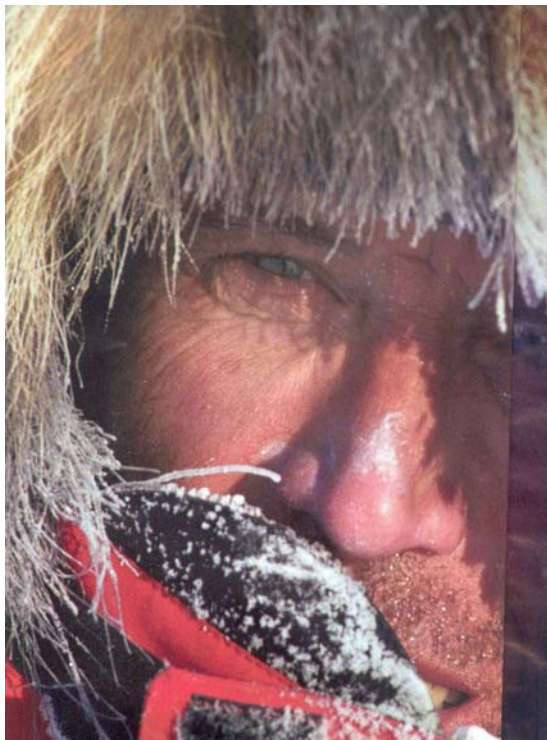
“One’s destination is never a place, but rather a new way of seeing things.”

Henry Miller

Appendix 1: Map of the Arctic Circle and the Arctic area considered as polar in this research



Appendix 2: Advertising campaign from Rolex



VOUS AVEZ 100 JOURS POUR FAIRE
3924 KM À PIED.
UN DÉTAIL : CE SÉRA DANS L'ANTARCTIQUE.
QU'EN DITES-VOUS ?

Alain Hubert, lui, n'a rien dit. Il l'a fait. En 99 jours. Il n'est pas homme à refuser les défis, aussi incroyables soient-ils. Il est même plutôt capable de les provoquer. C'est ainsi qu'en 1997-1998, il a traversé tout l'Antarctique à pied, à skis et avec une aile volante. La liste de ce qu'il a déjà réalisé dans sa vie est un véritable livre d'histoire. Il a été, par exemple, le premier à escalader un obstacle aussi abrupt que le mur du Holtana dans le Queen Maud Land, dans l'Antarctique. Il a traversé le Groenland à skis. Il a atteint le Pôle Nord géographique et s'est attaqué cinq fois à l'Everest, évidemment sans oxygène. Alors si quelqu'un personifie l'éternelle quête d'aventure, ce ne peut être que cet homme : Alain Hubert.

= You have 100 days to WALK 3924 KM. One detail: it will be in the Antarctica. What do you think?



OYSTER PERPETUAL EXPLORER
WWW.ROLEX.COM

ROLEX



QUATRE JOURS SANS DORMIR, SANS APPORT D'OXYGÈNE
ET UNE TEMPÊTE QUI S'ANNONCE :

LA VIE EST BELLE.

= Four days without sleeping, without oxygen supply and a storm is coming: LIFE IS BEAUTIFUL

La philosophie de Jean Troillet est simple : gravir les plus hauts sommets, sans apport d'oxygène, le plus vite possible, avec un équipement minimum. Et si possible, ouvrir une nouvelle route. Un tel programme paraît incroyable. Il a pourtant conduit Jean Troillet jusqu'aux sommets de l'Everest, à celui du K2, du Kanchenjunga, du Lhotse et de nombreuses montagnes parmi les plus hautes du monde. Cette sorte de défis ne se limite pas seulement à la montagne. Il a entrepris la traversée du Cercle Arctique à skis, tiré par des rennes. Il s'est également révélé un navigateur hors pair. Selon Jean Troillet lui-même "La passion est une maladie dont on ne guérit pas, et que l'on voudrait transmettre au plus grand nombre".



OYSTER PERPETUAL EXPLORER II
WWW.ROLEX.COM

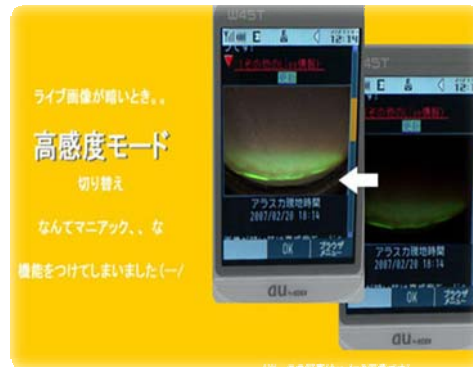
ROLEX

Appendix 3: The Northern lights industry

The Japanese fascination for northern lights



A northern lights' simulator



A cell phone streaming live videos from Alaska's northern lights



Glass igloo, Kakslauttanen, Finnish Lapland

Appendix 4: Focus group guideline

Material: advertisements, brochures, pictures from polar destinations (see appendices 5 and 6)

Part 1: Introduction

- Brainstorming: when I say polar destinations, what come to your mind?
- What would be your definition of polar?
- Have you ever been to a polar country?
- Now I will show you some pictures...can you tell me in which countries they were taken? What helped you to find the answer?

Part 2: Getting to the topic

- Do you think demand for polar tourism is increasing, or decreasing? Why?
- In which stage of the destination life cycle do you think are polar destinations? (drawing on board)
- Which scenery do you imagine when I say polar destinations?
- Could you name some polar destinations?(apart from game)
- Would you like to visit a polar destination? Why? Why not?

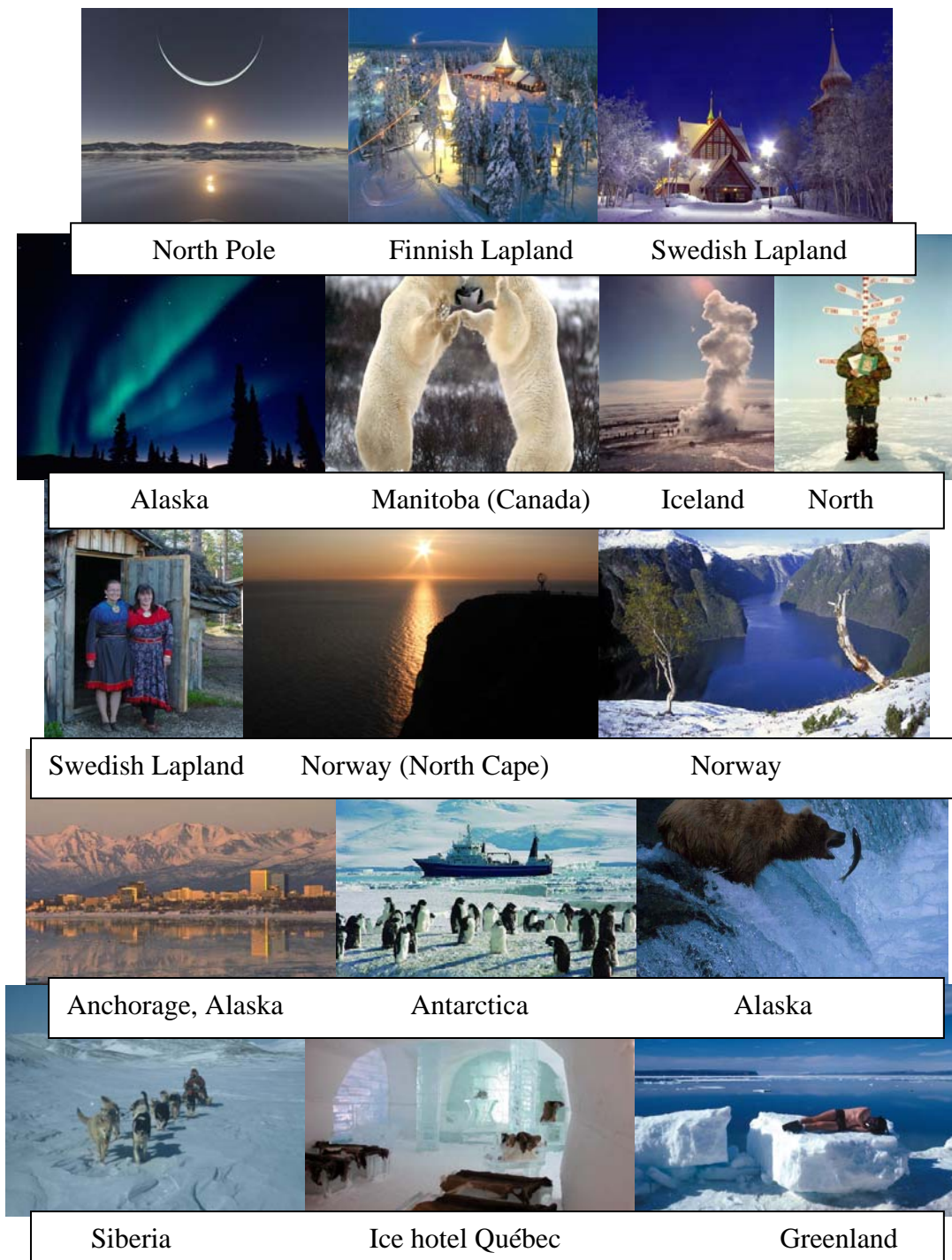
Part 3: The topic

- If you had to visit one, which one would it be?
- Round table: pick one destination and justify your choice
- Handed material: advertisements and leaflets for several destinations: now chose the ad or leaflet (only from the cover) you prefer and justify your choice
- Can you establish differences between polar destinations?
- Can you establish differences between the main geographical polar areas? (Nordic countries, Northern Canada and Alaska, North Pole, Antarctica, Siberia?)
- Which ones do you think appeal more/less tourists?
- Which activities do you know as specific of polar destinations?
- Do you often hear about polar tourism? How?

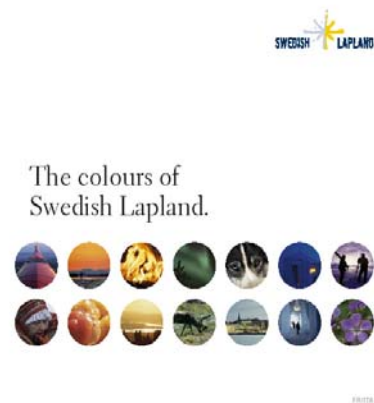
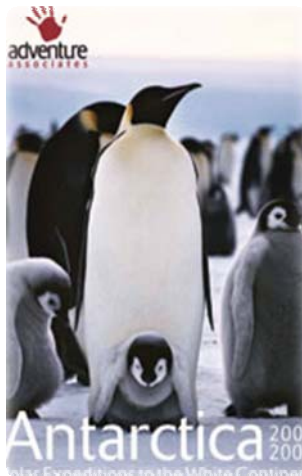
Part 4: Conclusion

- What are your plans for the next holidays?
- After this focus group, if you did not consider going to a polar destination before, would you consider it now?

Appendix 5: Some of the pictures shown during the focus group's « game »



Appendix 6: Brochures' covers and advertisements shown during the focus group



Appendix 7: Personal interviews guideline

Topic 1: Polar regions, polar tourism and polar tourists	Precisions
Do you consider polar and winter tourism as different?	Why? Why not?
Do you think that polar tourism will someday become mass tourism?	Why? Why not?
Have you noticed an effort from polar destinations to develop distinctive products?	If yes: for example, which products? How can you explain this tendency?
Topic 2: Your destination	
In what stage of the destination life cycle would you locate yours?	New trends, growth, maturity or decline/revitalization
Does your destination suffer from seasonality?	Why? Why not? What could be a solution (in case of answer “yes”)?
Do you consider your destination as expensive?	
Could you establish a profile of your typical visitor?	Income, nationality, age...
Which destinations do you consider as your main competitors?	Why? What are the weaknesses of your destination?
Which tourism products/services does your destination propose?	Do you think these products are part of a typical polar destination offer?
Do you consider your destination as different from the other polar destinations?	In which aspects?
What is (or are) the competitive advantage(s) of your destination?	What are your main asset(s)? What is your Unique Selling Point?
Did your destination sacrifice products/services, attributes or target markets in order to be different?	
Do you consider your destination as environmentally friendly?	If yes: why, and do you think it is a difference?
Topic 3: Differentiating ideas	
Do you think creativity can be a differentiating idea?	Why? Why not?
Do you think a differentiation on prices is possible with high prices?	If yes, under which conditions? If no, why not?
Do you think that to be first (=precursor), or specialist is a differentiating idea?	Why? Why not?
Do you think that differentiation can be based on tradition?	Why? Why not?
Do you think that to be trendy can be a differentiating idea?	Why? Why not?
Comments or suggestions? Name and function?	

Appendix 8: Interview of Ms. Harmony Hunter (Whitehorse, Yukon) passed « through » the methodological table

Dimensions and variables	Content and quotations
Polar tourism, regions and tourists	
Polar and winter tourists are two different types of tourists.	Polar tourist are people that like to go North. Winter tourism could be anywhere in the world. <i>“I can go skiing in British Columbia or I can go skiing in France.” “People that go all the way to Yukon and to Alaska, it’s a fairly big step.”</i>
Polar tourism will never be mass tourism	By word of mouth it will become mass tourism because everywhere else will be crowded and people will be looking for something different and new, and <i>“eventually lots of people are gonna come up here.”</i> . People are starting to find out about the Yukon, the baby boomers are a bit more adventurous now. <i>“There’s just so much room for growth here”</i> .
Polar regions are trying to develop distinctive products	Yes. Many operators around here do their best to distinguish themselves, from operators in Alberta for example. The Yukon Quest, a big sledge dog race, is something distinctive.
Polar regions suffer from seasonality, except for the Nordic countries	Definitely, the Yukon suffers during shoulder seasons (spring and fall) , need to work on promoting shoulder seasons. It’s a matter of the right marketing. <i>“We have a lot of things going on in the winter but I think the overall interpretation is that we are shut down in the winter, which is not true”</i> .
Polar destinations are expensive	Yes, it’s a bit pricy, because the Yukon doesn’t have a port, so shipping and handling is very expensive, as well as eating out and certain attractions.. But not more expensive than Vancouver or Victoria. Visitor profile: Retired baby boomers from across Canada and the US, fairly well off.
Polar regions suffer from a lack of differentiation/the offer is homogeneous and products are hard to differentiate	Competitors: Alaska, British Columbia and Alberta Definitely typical from polar offer, similar to Alaska products for instance
Creativity is usually not a differentiating idea	Being innovative, try to offer something different is important. Operators here try to be different, to offer the best experience. <i>“Being so far north and not having the advantages of the bigger cities in Canada, you have to be creative up here”</i> .
A differentiation on prices is possible with high prices	Yukon is a bit expensive but not sure you can base a differentiation on that.
To be first can be a differentiating idea	Definitely, the first to do something
Tradition can be a differentiating idea	Definitely, the gold rush for instance is one of the things that makes the Yukon unique, <i>“that’s basically what made us famous”</i> .
To be specialist can be a differentiating idea	Yes
To be trendy can be a differentiating idea	Yes, but for while, because <i>“trendiness comes and goes”</i> ...
To be environmentally friendly is not enough to be different	Ecotourism is important in the Yukon.
A new idea: combination of tourism types	Outdoor activities combined with museums and historical places (gold rush) <i>“Whitehorse is a decent size city, with all the amenities that you can ever need, but then two minutes outside you are in the wilderness.”</i>

New element: the access as a competitive advantage	<p><i>"It is the whole experience, of even coming to the Yukon that makes it distinct (...) we are far North"</i></p> <p>Direct flights Frankfurt-Whitehorse in summer</p>
Value must be added to existing resources (natural for instance)	<p><i>"It's the whole experience, of even coming to the Yukon that makes it distinct. We provide a product that is in a pristine wilderness and I think that's what makes us distinct. We have huge things".</i> The main distinction is that, there's so much space up here that you really can go into the wilderness and be away from everything. Along with the outdoor wilderness and activities, there are museums and historical places where the gold rush took place. <i>"Whitehorse is a decent size city, with all the amenities that you can ever need, but then 2 min outside you're in the wilderness".</i></p>
Differentiation often require a sacrifice of products/services, attributes or target markets	<p>Did not have to sacrifice anything.</p>
The differentiation has to respect the USP criteria	<p>Pristine wilderness is not unique, but besides there are the gold rush historical settings, unique to the Yukon.</p>

Appendix 9: Anchorage branding and communication



Seymour the moose,
Anchorage's symbol



Anchorage: Big wild life, the new brand that shows all the city's facets



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