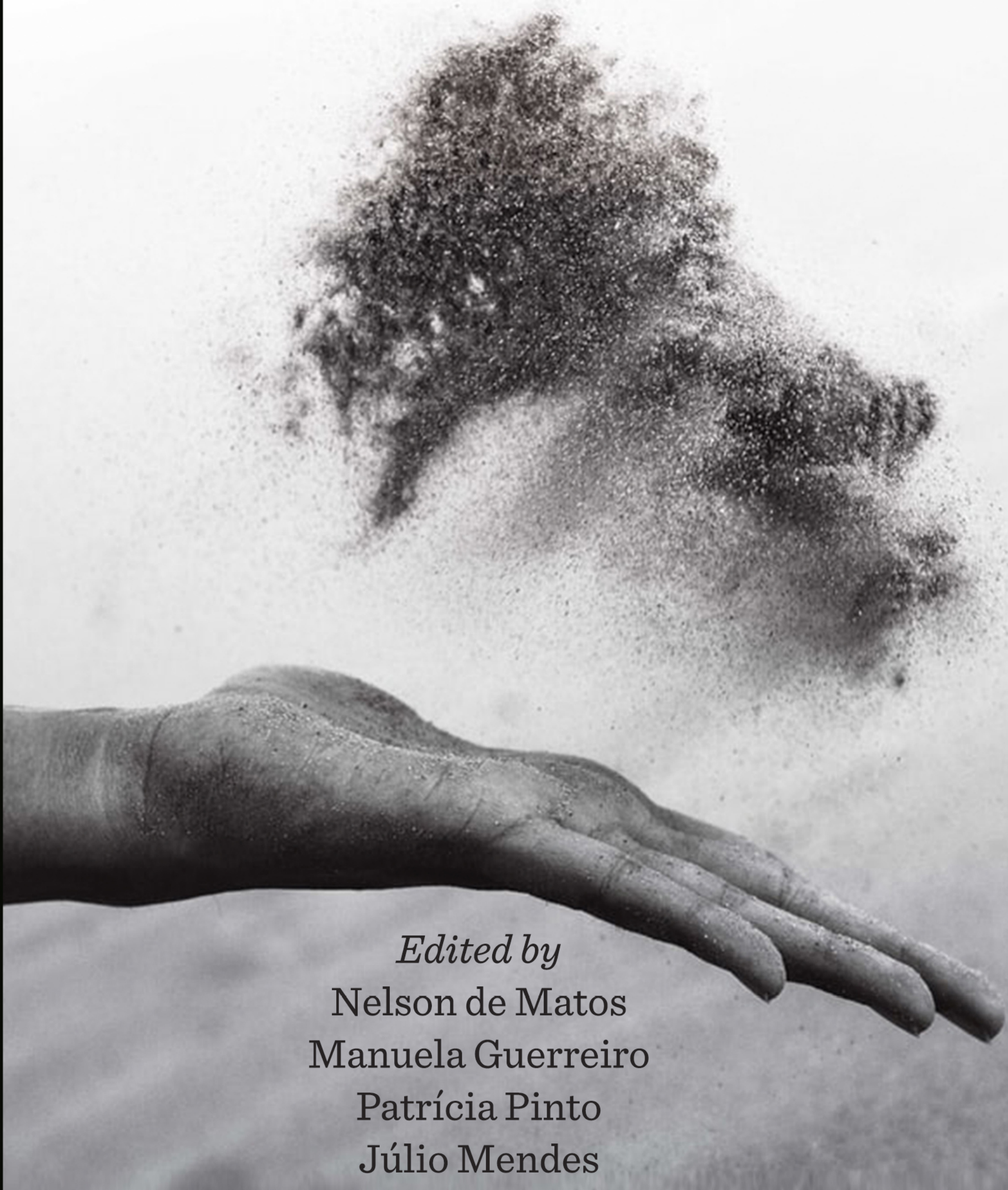
Marketing, Creativity and Experiential Design



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PREFACE

Marketing is "the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large" (American Marketing Association 2015).

On the other hand, design is regarded as a human-centred approach to innovation, focusing on developing meaningful solutions for customers.

Combining these two approaches has led to an increase of interest in understanding the contributions of design and design management to the marketing strategy. One of the reasons for such interest in both disciplines lies in the difficulties firms face in achieving customer satisfaction.

In effect, design has been a critical factor in managers' decision-making and operational processes to answer the new way consumers perceive, consume and act upon services and products. This recognition regarding marketing design research has grown significantly during the last decade of the 20th century and arrived long after Kotler and Rath's claim in the 80's that marketing needed design. Such suggestion resulted from the role and importance of Marketing and design intersections to:

Marketing, experiential design and innovation - the experience marketing, centred on the consumers' subjective evaluation and consumption, requires creativity to build new stages to reach consumers and get their attention and emotional responses to establish a higher degree of product connection with organizations' brands.

Designing creative products and packaging preferences - new product development can change the market because sustainable approaches require creativity to transform old products into new ones. In addition, customers' preferences are also evolving in the same direction, leading to the use of colour as an instrument to get customer preference.

Digital marketing, interaction design and Human-centred design - the experience of consumers was extended to the digital market, allowing for new ways to create, engage and involve customers. User Experience, User-generated content, SEO, SEM, among others, became new terminologies to help consumers' experience in this new world. The digital market also permitted the development of new markets (e.g. social marketing, Internet of things, and marketing automation). The Human-centred design and the environmental setting in which organizations operate and customers act requires a design approach to assist and enhance these interactions between the offer and demand sides.

Research methodologies developments in Design management and marketing - mix-method approach between academia and industry managers have become the norm. New techniques and methodologies in understanding the consumers' experience and journey throughout the different platforms and channels are required. Firms and marketing managers also need user-friendly design and insights on improving service efficiency, quality, and, mostly, consumers' experience.

Marketing, Creativity and Experiential Design: future avenues - anticipating the future is a critical task to be accomplished without neglecting the past and present state of the art. The existing routes and future avenues among extant theoretical and empirical frameworks provide marketing and design crucial challenges for acquiring and retaining consumers.

Nevertheless, marketing and design intersection studies are lacking, remaining a modest topic despite its importance and previous attention. For instance, several academics and practitioners have started to examine design as a strategic approach considering that it could be a valuable way to innovate and address customers' needs with impact in redesigning business models. Firms also became aware that design can improve products' aesthetics and functionalities, influencing consumption choices.

Thus, it is fundamental to understand the consumer target behaviour to translate the marketing strategy into relevant iconographic images. Design is generally seen as a combination of artistic, communicative and strategic measures or as *art*.

Therefore, we aim to understand and explore the marketing and design framework and find its intersections to identify challenges and opportunities.

In effect, marketing and design require an integrated approach to convey different perspectives, particularly creativity, stimuli, and emotions. Today like tomorrow, product and service brands need to be designed, delivered and managed as a holistic and meaningful experience. This marketing perspective highlights consumers' emotional responses and involvement in co-creation activities. It also emphasizes customers engagement as a critical variable to awaken and generate specific responses, purchase decisions, and brand attachments during experiential consumption.

Thus, creativity, innovation and distinctiveness are determinants for design success, providing differentiation and added value to products and services.

In other words, design provides a unique opportunity for organizations to gain a competitive advantage in their daily battle in acquiring a unique selling proposition and a high level of brand awareness in the market. Thus, the challenge lies in finding and understanding the synergies between these two areas. The existing literature recognizes fruitful research avenues. One of these avenues is design and environmental cues (e.g., atmospherics and *servicescapes)* influence on customers' behavior and emotions.

It is also unclear how to incorporate art, design, or aesthetics in decision-making from the marketing perspective. This gap emphasizes that there is still much to be known about design and its influential role in marketing. Thus, the task for any marketer and designer lies in overcoming these gaps and strengthening marketing and design interplay.

PART I –

MARKETING, EXPERIENTIAL DESIGN AND INNOVATION

CHAPTER ONE

EXPERIENCE MARKETING — SYSTEMATIC LITERATURE REVIEW: IDENTIFYING FUTURE AVENUES

NELSON DE MATOS, JULIO MENDES, MANUELA GUERREIRO

Introduction

The concept of experience marketing (EM) has been a challenging theme for many researchers over the past few decades (Holbrook et al. 1984; Hudson and Ritchie 2009; Alagöz and Ekici 2014; Nasution et al. 2014; Tao 2014). This is mainly because of consumers' new needs and new trends, but it is also due to the highly competitive arena in which managers and stakeholders must operate. In this environment, managers seek to gain a competitive advantage by setting the correct positioning strategies, as Crompton, Fakeye, and Lue (1992) and Pike (2012) suggested, and by creating, using and developing brands that sell experiences (Pine and Gilmore 1998).

Therefore, a better comprehension of EM is necessary, since the success and survival of many organisations depends on selling experiences. In this regard, to understand it, scholars and managers have to "look back into the past" and identify "tendencies to anticipate the future" (Saur-Amaral, Ferreira, and Conde 2013: 35).

Moreover, a systematic literature review covering 35 years of research, describing the key contributors' authors, research areas and clustered topics, is missing. From this literature analysis, potential gaps can be identified, and new or old avenues of research can be rediscovered or strengthened. Thus, this paper's main goal is to identify the research gaps in the experiential marketing (EM) area. For this goal, the following specific objectives were set:

- To provide an overview of the main contributors to the EM framework.
- To identify the main areas of research within the EM.
- To find out the main clusters and items (or research topics) studied until the present.

Therefore, this paper will first address the literature review, followed by the methodology and systematic literature review procedures as identified by Saur-Amaral et al. (2013). In the section 'Systematic Literature Review', the search steps and filtering procedures are explained, followed by the descriptive statistics. Then, the bibliometric networks will be presented, and potential research gaps identified. Lastly, conclusions are presented.

Literature Review

The EM construct has been recognised in the literature since Balderston's (1925) initial work on co-production in the milk industry, followed by Martineau's (1958) discussion of store personality and Holbrook and Hirschman's (1982) reinforcement of fun and fantasies as relevant aspects of consumers' needs and wants. Since the 1990s, three seminal works have been published that have captured the attention of academics and practitioners. The first of these was the introduction of the Experience Economy concept by Pine and Gilmore (1998); the second was Schmitt's (1999) book, which made an initial attempt at bordering/framing the construct; the third was Brakus, Schmitt, and Zarantonello's (2009) brand experience scale.

The deep impact of these authors' works at the end of the millennium was followed by many other authors addressing conceptual and theoretical reviews (e.g. Oh, Fiore, and Jeoung 2007; Tynan and McKechnie 2009; Verhoef et al. 2009), consumer behaviour (e.g. Akgün, Koçoğlu, and İmamoğlu 2013; Krishna and Schwarz 2014; Gilovich, Kumar, and Jampol 2015; Lemon and Verhoef 2016), brand and brand experience (e.g. Brakus et al. 2009; Khan and Rahman 2015), festivals (Akyildiz and Argan 2013; Lee and Chang 2016), and many other related topics (Petrick 2002; Quadri-Felitti and Fiore 2012).

The need to establish an emotional brand attachment (Schmitt 2013; Khan and Rahman 2015; Schmitt, Joško Brakus, and Zarantonello 2015) with consumers has been repeated. The reason lies in what consumers nowadays seek, which is neither simply goods nor services but the benefits of the experience consumption provides (Pine and Gilmore 2011). In this cluttered market, managers need to understand the subjective and composite nature of the experience construct. As Ritchie and Hudson point out, among the fundamental streams identified as the major challenges in consumer experience research is a "conceptual work and/or research that [seeks] to define and understand 'the essence' of the experience" (2009: 111).

Methodology

To examine the extensive body of literature, 1159 documents on EM (published articles, articles in the press, conference papers, book chapters, reviews, short surveys, editorials, notes, etc.) were retrieved to perform the systematic literature review, which consists of a process to "summarize in an explicit way, what is known and not known about a specific practice related question" (Briner, Denyer, and Rousseau 2009: 19).

For the analysis of those documents, a Social Network Analysis and Visualisation software was used "to provide easy-to-interpret graphical representations of bibliometric maps" (van Eck and Waltman 2010: 529). The software was previously employed in other studies (Leydesdorff, Bornmann, and Zhou 2016; Olczyk 2016).

Systematic Literature Review

Search Steps and Filtering Procedures

The search was conducted on 22 November 2016, using the Scopus database, "the largest abstract and citation database of peer-reviewed literature" (Elsevier 2016). The search terms used were "experiential marketing" and/or "experience marketing" for publications within the years 1982–2017, and added to the database in the last seven days. All document types were included in the research (published articles, articles in the press, conference papers, book chapters, reviews, short surveys, editorials, notes, etc.). The subject areas defined were *business, management, accounting area*, and *social sciences*. All other areas, such as medicine, engineering, agriculture, and environment (among others) were excluded due to the study's purpose (i.e. marketing area). A third subject area, classified as *undefined areas*, was subsequently included in the search after a comprehensive reading of the documents that were relevant to the study's aim.

No limitation was made regarding keywords, source title, author's name, or country. A total of 1159 documents were obtained. In the next step, a full list of the documents, including title, abstract, year, name, subject area, document type, source title or type, country, keywords, and language, were exported to a CSV file. The file consisted of the working sample which was exported to the network software analysis used to construct and visualise bibliometric networks. Using the software, the sample of the documents was loaded, and the number of occurrences set for the terms was 10 (out of a total 3119 terms found). Next, of the 32 terms, 19 terms were selected as the most relevant (60% of the full list of terms) (van Eck and Waltman 2010).

Descriptive Statistics

In Figure 1-1, the documents distribution per year from 1982 to 2017 shows a growth of interest by researchers on the topic in 1995 (with a minor decrease to only 16 papers in 1999) to reach 26 papers by 2000. The peak year of publishing represented in the sample was 2012, with 102 documents in one year. After this period, the topic remained important but without the intensity of 2012, as 2015 showed only 60 documents published. Nevertheless, by the end of 2016, 82 documents had already been published.

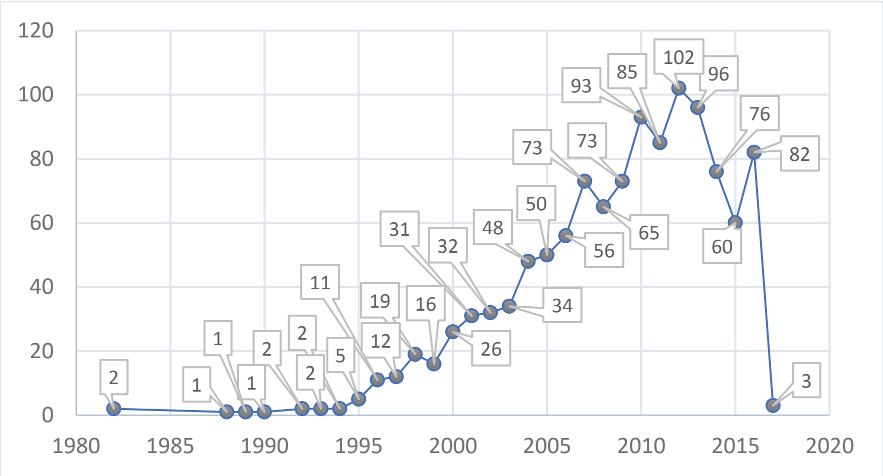

Figure 1-1 Documents Distribution per Year (1982-2017)
Source: Authors' Own Elaboration using Excel Software

With regard to the subject areas of the experience marketing documents, the business, management, and accounting areas were the most dominant with 987 documents (85.2%), followed by the social sciences with 360 documents (31.1%) and undefined/other areas with 19 documents (1.6%).

Next, the research identified the most representative journals (Figure 1-2) as the *European Journal of Marketing*, with 39 documents in total (3.4%), followed by *Tourism Management* with 38 documents (3.3%), *Journal of Consumer Marketing* with 32 documents (2.8%), *Journal of Retailing and Consumer Services* with 31 documents (2.7%) and *Marketing Intelligence and Planning* with 30 documents (2.6%). These were the only journals to reach a total of 30 documents within the set timeframe.

The distribution of the documents per country (Figure 1-3) was also assessed, with the United States (379 documents) showing a clear leading position compared to other countries. In second place is the United Kingdom (216 documents), followed by Australia (106 documents) which had less than half the number of documents published in the UK. In fourth place was Taiwan (50 documents), and in the succeeding places, Canada (48 documents), Spain (40 documents) and France (39 documents). Overall, the dominance of English-speaking countries in experiential marketing research is most apparent.

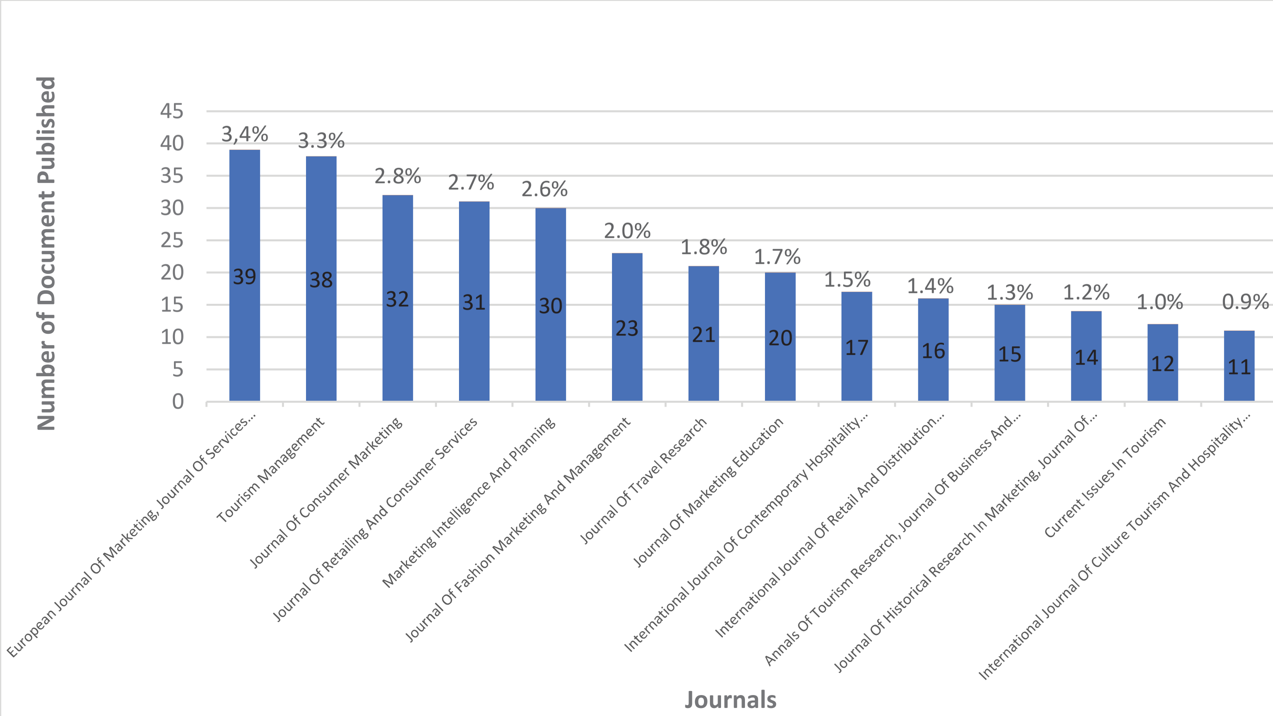

Figure 1-2 Documents Published per Scientific Journal (1982-2017). Source: Authors' Own Elaboration using Excel Software

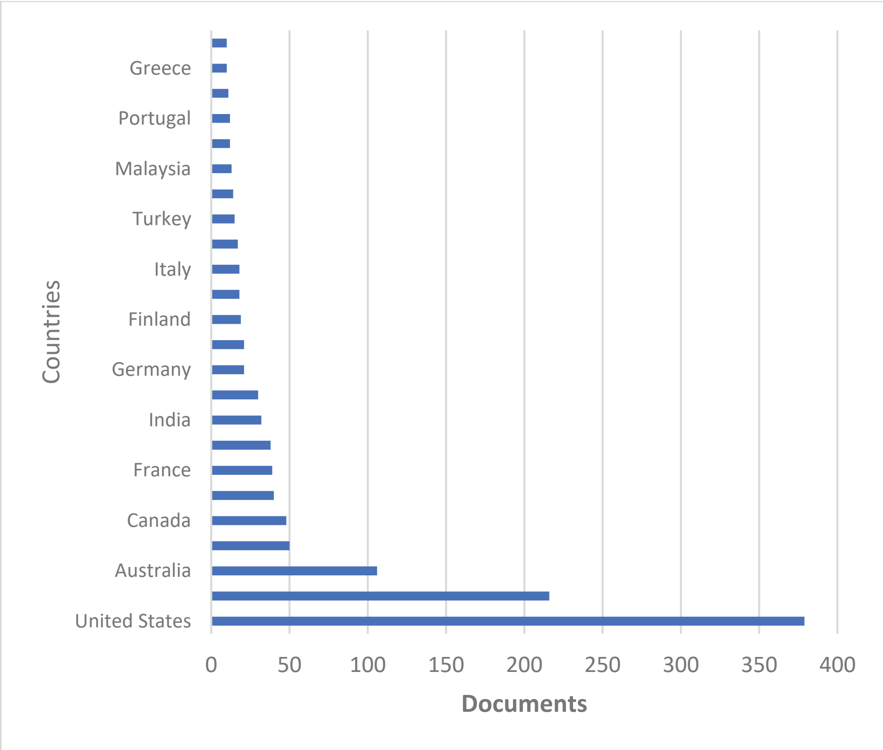

Figure 1-3 Documents Distribution per Country (1982-2017)
Source: Authors' Own Elaboration using Excel Software

The authors that published the most research on the construct (Figure 1-4) were identified as Fiore, Gilmore, Palmer, Ennew and Wilson (four documents in total), followed by the remaining authors listed in Figure 1-4, with a total of three documents published. Although EM is a subject of interest to many authors, no authors in the sample showed a predominance over their peers regarding published documents.

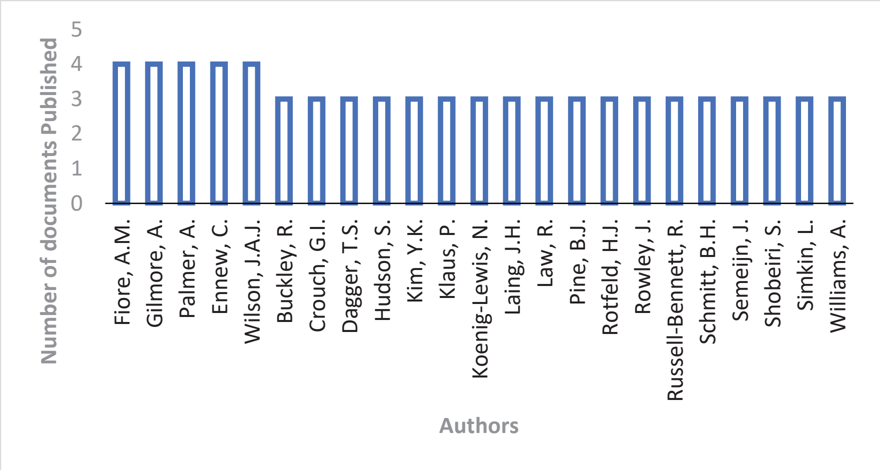

Figure 1-4 Distribution by Author (1982-2017)
Source: Authors' Own Elaboration using Excel Software

Next, the bibliometric data retrieved from the sample and the networks established among the different items in previous studies will be studied. Initially, the overall map of the main areas which were identified will be explored, followed by an individual analysis of each area. Thereafter, the overall networks will be presented.

Exploring the Bibliometric Networks

After running the social network analysis and visualisation software with the sample file about experience marketing, three main areas could be identified, as Figure 1-5 shows: a) tourism, b) marketing, c) business. A fourth area, outlined in gold and associated with the retail sector, could also be acknowledged. The research networks identified demonstrate the rather balanced distribution of topics between the four areas, despite some dominance of marketing due to the size of the *effect, influence* and *satisfaction* spheres (which represent the most relevant items regarding experiential marketing studies). Overall, topics regarding *tourism, tourist, culture, motivation, visitor* (in **tourism**), *organisation, business, success, case study,* and *university* (in **business**) are the areas most explored by previous researchers.

Figure 1-5 Literature Review, Map of Main Items per Area
Source: Authors using Network Analysis and Visualisation Software

Regarding the four main areas identified, the business-related research in Figure 1-6 demonstrated concern for items related to *success, organisation, technology, case studies, community, network, planning, innovation, university,* *planning,* and *promotion.* At the same time, new areas in the business area can be identified, such as *money, marketing mix, operation, teaching, diversity, emergence, partnership, collaboration, personal experience, higher education, transaction,* and *positioning.*

Figure 1-6 Business Area
Source: Authors using Network Analysis and Visualisation Software

The tourism sector also demonstrated (Figure 1-7) the sphere items *tourism, tourist, culture, place, image, motivation, visitor,* and *culture* as the most dominant. New items can nevertheless be found, such as *Facebook, scholar, hospitality, travel, authenticity, marketing implication, attraction, tourist experience, tourism industry, destination marketing, festival* and *entertainment.*

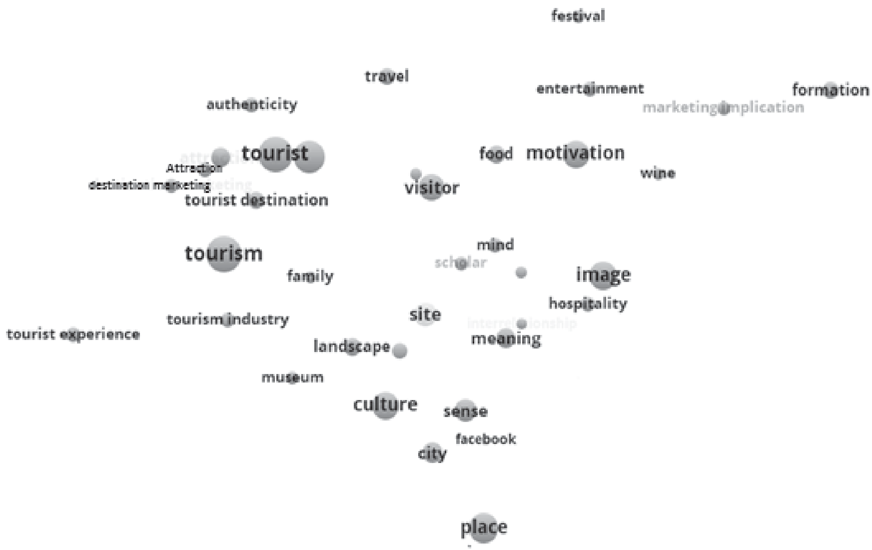

Figure 1-7 Tourism Area
Source: Authors using Network Analysis and Visualisation Software

The marketing area (Figure 1-8) shows more diversity of items, despite some dominance of the experiential marketing *effect, influence, attitude*, *behaviour, intention, customer satisfaction,* and *trust*. New methods of establishing networks of constructs can be seen in *structural equation modelling*. Moreover, items related to *feeling, pleasure, positive effect, conceptual model, service provider, brand experience, willingness, setting, positive effect, antecedent, construct, moderating role and effect, advertisement,* and *customer loyalty* are becoming evident.

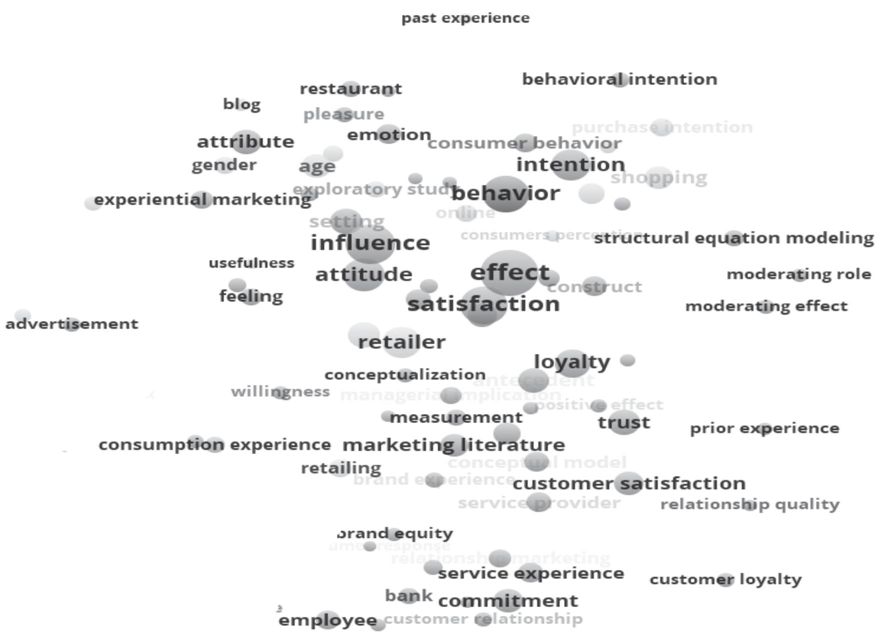

Figure 1-8 Marketing Area
Source: Authors using Network Analysis and Visualisation Software

A fourth area can be considered within the marketing area related to retail experience (Figure 1-9), despite being in its early stages; items such as *retailer, store, age,* and *shopping* are the most prominent. On the other hand, *reputation, audience, online, purchasing intention, retailing,* and *gender* assume greater interest among researchers.

Figure 1- 9 Emergent Area of Retail
Source: Authors using Network Analysis and Visualisation Software

Next, the items were analysed with regard to their evolution and networks over time (specifically the period from 2006–2012, one of the most active) through networking mapping. In Figure 1-10, the items within the timeframe mentioned are represented by colours, from blue (2006), light blue (2008), yellow (2010) to red (2012 or later). In this regard, it can be found that the business area was primarily a key area for EM, since most studies at the early stage (2006) were published within this area. From 2008 (in light blue), the first networks between business and other areas of marketing and tourism were made, with *influence, retailer, place, customer satisfaction, service experience, image* as the most evident.

After 2010 (in gold), the researchers' focus was aimed at *effect, tourist, loyalty, motivation, visitor, behaviour,* and *trust* (marketing area), among other areas. In 2012 and later, the network map does not confirm an evident presence of any special or strong topic, although *motivation, authenticity, entertainment, festival, destination image, hospitality meaning, mind, connection,* and *website* in the tourism area start to progress. The same can be said about the items *behaviour, satisfaction,* and *customer satisfaction* in the marketing area. Still, the strong presence of the business approach, moving to or reaching the areas of tourism (such as *tourism, tourist* *destination, culture,* and *landscape*) and marketing (such as *commitment, feeling, gender,* and *influence*) can be seen in Figure 1-10. New items regarding *purchase intention, relationship quality, moderating role and effect, behavioural intention, past experience, formation, festival,* and *destination image*, among others, were also identified.

Figure 1-10 Main Areas Networking, Time Series (1982-2017)
Source: Authors using Network Analysis and Visualisation Software

Similar inferences can be drawn from the density map (Figure 1-11), in which "the colour [red] of a point in a map depends on the number of items in the neighbourhood of the point and on the importance of the neighbouring items. The density view is particularly useful to get an overview of the general structure of a map and to draw attention to the most important areas in a map" (Van Eck and Waltman 2010: 529). From the density map, three main areas – marketing, business and tourism – once again reveal their importance. The fourth – retailing – is emergent, but not so evident in the density map (Figure 1-11).

In marketing, *influence, effect* and *behaviour* are in the red area as the most important, but other items are increasingly relevant (identified in the yellow area). These items are *retailer* (within the border of the colours red and yellow*), loyalty, attribute, emotion, conceptualisation, trust, marketing literature, measurement,* and *structural equation modelling.* In the business area, *organisation, business, success, case study, economy* and *community* are revealed to be the most important once again, but in the yellow area, only *university, detail, planning,* and *emergence* are found, demonstrating less diversity than marketing. The items *place, city,* and *culture* are aggregated to the tourism area, but are very close to the yellow area and the region of the business area, probably due to the way these items are seen nowadays, e.g., tourism from a business perspective. The tourism area is the smallest relative to marketing and business, and it also shows the least diversity in relevant items, with only *tourist* and *tourist destination* in red. In yellow, *tourism* and *authenticity* can be found.

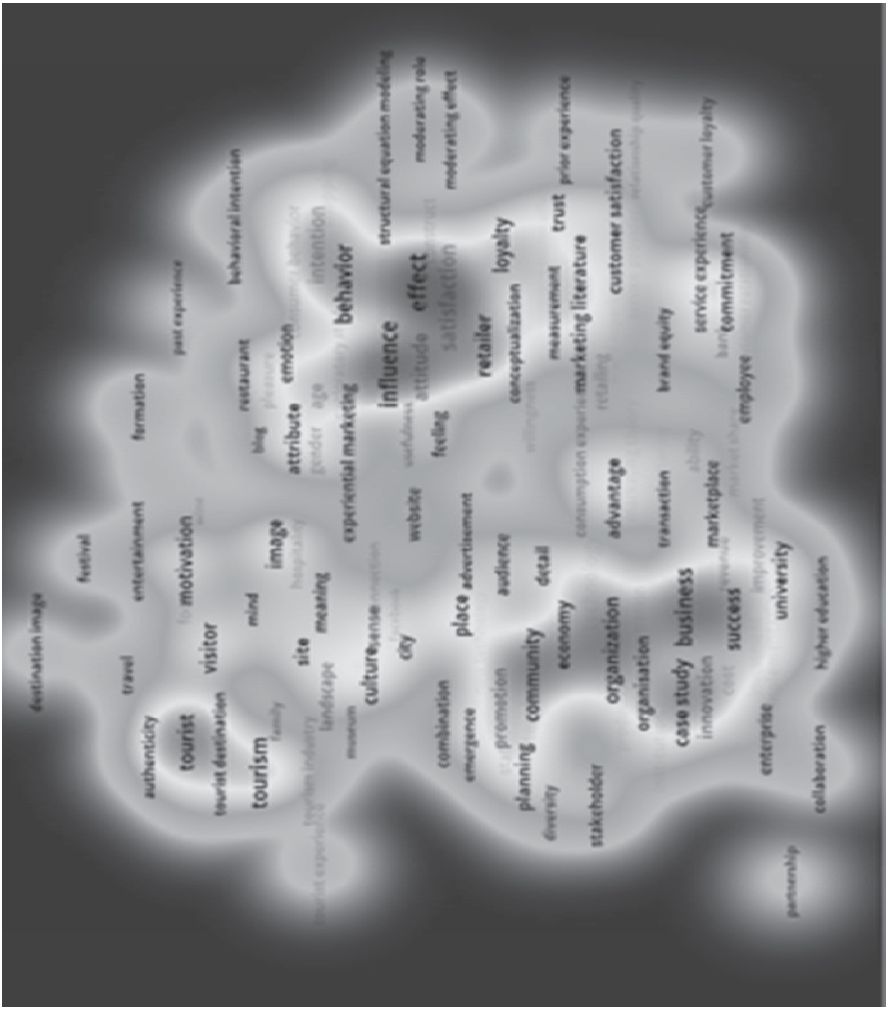

Figure 1-11 Marketing Density Map (1982-2017)
Source: Authors using Network Analysis and Visualisation Software

Identifying Research Gaps within the Literature Review Using a Density Map

From the density map (Figure 1-11), the items identified previously were built into clusters using the software. From these clusters, several items were identified and networks found. Since the red, yellow and even green areas were the most explored over the timeframe of 35 years, potential research gaps can be identified in the light blue areas, as they still lack a better body of knowledge regarding networks among the different items of the EM framework. In this context, and without neglecting the other areas of opportunities (e.g., in the red zone), the emergent items (i.e., light blue areas) for EM or future topics can be summarised as follows:

- Partnership, collaboration, and higher education (business context);
- Tourist experience, destination image, festival and family (tourism context);
- Customer loyalty, relationship quality, prior experience, moderating effect, moderating role and behaviour intention (marketing context).

Experiential marketing within the area of tourism requires further attention from academia, since there is not much *neighbourhood* (i.e., red zones are separated and distant from each other) among items identified in the density map (Figure 1-11). On the other hand, both business and marketing approaches have established a solid background from the density image, but the networks between both areas is still wide and bridges need to be built: there is no yellow or red corridor linking both areas. Conversely, business and tourism show a light yellow "path" connected lightly to both areas, i.e. the items *place, city,* and *culture*. Nevertheless, there is still space for networks to be established between all areas and items.

Conclusions

In the context of experiential marketing, the study's first goal was to identify research gaps in the experiential marketing (EM) construct. The results revealed the importance of assessing alliances (items, *collaboration* and *partnership*) in *higher education* within the EM business research area. In tourism, *the tourist's experience, the destination image, festivals* and *family* are undeveloped areas. In marketing, the quality of customer engagement (items*, relationship quality)*, prior knowledge and experience (*prior experience*) will continue to impact (*moderating effect* and *moderating role*) the consumer's decisions (*behaviour intention, customer loyalty)*. The second objective set was to provide an overview of the main contributors to the EM construct. The results showed an increase in interest for the topic EM over the years, reaching its peak in 2012. It was also found that the journals that most contributed to the construct were marketing journals (*European Journal of Marketing, Journal of Services Marketing*), apart from *Tourism Management*. The United States, the United Kingdom and Australia were the countries in which the topic was researched the most. Moreover, the predominance of English-speaking countries is also demonstrated regarding the most prolific authors, with the top three (Fiore, Gilmore and Palmer) being native English speakers.

The research also found three main areas or approaches (*Marketing, Tourism* and *Business)* within previous EM research (third objective set). A fourth area considered to be emerging, *Retail*, was also found. Within those areas, the main clusters and items (or research topics) studied were found (fourth objective). Among these, *success, organisation, technology, case studies, community, network* and *planning* were acknowledged from the business perspective. *Tourism, tourist, culture, place, image* and *motivation* were clustered in the tourism area. Finally, in the marketing area, *effect, influence, attitude, behaviour, intention, customer satisfaction* and *trust* were all found to be important in the past decades. The research provided an overview of the EM construct over a timeframe of 35 years, identifying areas, items, clusters and trends. The origin of the main body of the literature at an early stage was also possible to identify; its evolution and networks (i.e. Figure 1-10) within the different items and areas of knowledge (marketing, tourism, business) were also distinguished in the study. The importance of the construct EM is not limited to one area of knowledge but is endless in having many different networks between its three main areas, as described.

Acknowledgements

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CHAPTER TWO

INNOVATION THROUGH THE EXPERIENCE ECONOMY: THE SYNERGY BETWEEN PRODUCTS, SERVICES, AND EXPERIENCES

MOHAMMAD BAGHERI,
CLÁUDIA BRAGA DA CUNHA

Introduction

Pine and Gilmore (1998) postulate that the economy has progressed from commodities to experiences, where the economic value of offerings has been set by two variables: price and competitive position. Goods and services have long been offered by companies and perceived by customers as distinct propositions. This idea started in the agrarian economy with products as mere commodities, evolved to the industrial economy that was mainly based on the production of goods, advanced and shifted to a focus on services that were mostly bundled with goods, and has now reached the stage where experiences are not part of services: they have become the new economic offering (i.e. experience economy) (Pine and Gilmore 1998). Within the supply and demand dyad, the authors have chosen to explore the experience economy construct from the supply viewpoint, which is considered the one that provides the stage for the experience to take place, although they recognise that usually, co-creation is part of the process (Pine and Gilmore 1998). Meanwhile, Sundbo (2009: 433) argues that researchers and practitioners need to perceive experiences as an independent industry that intends to provide a "mental journey" for their customers, leading to a memory, something that is "more immaterial and intangible than services".

LaSalle and Britton (2002) also claim that the shift from goods to services and now to experiences is unavoidable. Initially customers owned products that they liked to have combined with services. Nowadays, services are a given (expected), and customers prefer to have other things bundled within the products or services (i.e. different types of consumption experiences) in order to meet their expectations. Hence, the authors recommend that we stop thinking about what products do and start thinking about what they offer.

By looking at the current approach followed by businesses and the growing trend of companies moving towards a more experience-oriented proposition, it can be assumed that the evolution of products to services and then to experiences is the next level of innovation. Since innovation is no longer providing a full-featured product or an excellent service, it needs to be bundled with an unforgettable experience so as to become ingrained in the customer's mind, leading to re-purchases and the probable loyalty of the customer towards the company. In order to offer such innovative experiences, companies need to look at their core competencies in introducing a new offering (product/service) and the real needs of customers or the jobs to be done. LaSalle and Britton (2002) argue that incorporating unique and priceless attributes is possible in every product or service, but if they cannot be established in the offering itself (due to commoditisation), these characteristics may be built into the surrounding experiences. As the authors emphasise, a product is merely a portion of the total experience; therefore, the experience has the potential to be priceless.

Innovation can be sourced from bundling experiences with products and services, or it can also be positioned as a new offering or a new economic output in its own right. Pine and Gilmore (2011) argue that companies within the experience economy do not sell goods or services but the final result of them, i.e. the experience that is created within each customer. Thus, companies that wish to change their mindset and offer engaging value propositions that go beyond the mere utility of the product or service will be able to transform a dull encounter into an engaging one.

Accordingly, this paper focuses on three dimensions of a valuable offering by conceptualising the concept of innovation in the experience economy and introducing a model containing New Product Innovation (NPI), New Service Innovation (NSI) and Hybrid Solutions (HS). The remainder of the article is structured in the following manner: looking at the literature which suggests combining products and services to introduce hybrid solutions, exploring research in materialising service innovation, reviewing experience marketing and also taking a deep dive into the concept of the experience economy and finally concluding the discussion by presenting a conceptual framework for innovation in the experience economy.

Literature Review

Product Innovation vs Service Innovation–Should firms aim for the hybrid solution?

The literature shows that over the years manufacturing companies have been shifting their focus and also their efforts from products to the services which have been increasingly acting as the central part of each company's offering and consequent value proposition (Gebauer, Gustafsson, and Witell 2011). By changing their mindset from innovative products to services, companies have started to introduce new products and services that could be perceived by customers as added-value propositions (Eggert, Thiesbrummel, and Deutscher 2015). Where services have become an increasingly relevant part of a company's proposal, this has enabled them to achieve competitive advantages (Jacob and Ulaga 2008).

Companies in the manufacturing sector are developing new offers that combine goods with services where the role of innovation is emphasised not only in terms of financial performance but also takes into account the strategy and marketing of businesses (Santamaría, Nieto, and Miles 2012). Consequently, these types of companies are becoming more centred on customer needs and wants, as well as other factors related to the innovativeness of goods and services because it seems that they enhance the performance of the companies (Gebauer et al. 2011). This allows them to thrive and be perceived as early adopters of new technologies, presenting new products and services in advance of other companies. Through the combination of product innovation with service innovation, i.e. hybrid innovation, companies tend to enhance their profits where hybrid innovation acts as a complement of product innovation in industrial markets (Eggert et al. 2015). In addition, the literature shows that when companies incorporate the service component in their innovation process during the early stages, they seem to present better results, especially if the service becomes an integral part of the design thinking (Ulaga and Reinartz 2011). Manufacturers that take into account the offer of hybrid solutions during the creative process tend to look for opportunities to reduce their costs and achieve a more relevant competitive advantage (Ulaga and Reinartz 2011).

Scholars like Eggert et al. (2015) argue that industrial companies which choose to shift from product innovation to service innovation might see a decrease in their profitability. Since companies based on service innovation tend to show negative financial performance, the authors conclude that this type of innovation should not be regarded as a substitute for product innovation. When comparing companies that opted to enhance their products with new services against those that chose to focus their efforts only on product innovation, the latter tended to be outperformed. Therefore, in order to avoid what Eggert et al. (2015) consider to be a commodity trap, a company focused on the value creation regarding its services and hybrid innovations is expected to be able to establish a competitive advantage based on differentiation that may influence the perception of customers on price, and lead the company to achieve a greater financial performance.

Fang, Palmatier, and Steenkamp (2008) and Jacob and Ulaga (2008) reveal that companies which shift their strategy and focus to services related to their core product business tend to have increasingly positive revenues, especially if the service intensity overcomes a critical level of approximately 20% in terms of the company's turnover. Companies aiming to improve their value and enhance their performance may need to shift from a product-centric approach towards a more service-centred offering, thereby allowing them to stand out in the global competitive market (Fang et al. 2008). The research of Fang et al. (2008) shows that service transition strategies may decrease or increase depending on the growth level of the industry since up to a certain point the service ratio in high-growth industries tends to have a negative impact on a company's value.

Despite the existence of differences in terms of innovation processes between new products and new services, mainly ascribed to the characteristics of services like intangibility, co-production with customers, heterogeneity, and perishability (Nijssen et al. 2006), research findings show that new product development and new service development tend to have the same core dimensions. Moreover, new service development and new product development tend to involve distinct departments of the company where, for example, research and development is apparently more relevant to the latter (i.e. new product development), whilst the company's intrinsic capabilities and organisational factors may have a more significant impact on new service development (Nijssen et al. 2006).

According to Shankar, Berry, and Dotzel (2009), customers tend to evaluate a company's offering by the extent to which products and services become valuable when used together (i.e. complementarity), or by the level of dependence/independence of the solution, leading companies to bundle products with services. Therefore, depending on the degree of complementarity or independence, companies can have four distinct hybrid bundles: flexible, peace-of-mind, multi-benefit or one-stop. A flexible bundle occurs when products and services that are very independent of each other are combined in flexible ways, allowing customers to value them more significantly. In turn, the so-called peace-of-mind bundle enables a company to join products and services that are neither significantly complementary nor dependent on each other, but are attractive to the customer through the use of the brand's appeal. The multi-benefit bundle can be defined as a hybrid offering where product and service are highly dependent and complementary, and customers perceive their value only when they are sold together. On the other hand, a one-stop bundle combines products with services which, although apparently perceived as minimally complementary and highly independent when presented together, tend to attract consumers to purchase the service or the product simply because it is available at the point of sale.

Similarly, Santamaría et al. (2012) argue that hybrid offerings can be set in three different ways: combining goods and services in a single package that will allow the company to differentiate from its competitors; offering solutions that can fulfil customer needs instead of selling products per se; and enhancing consumer acceptance of a product through its use or adoption, overcoming possible situations that are apparently perceived as barriers.

Gebauer (2008) argues that companies which are product oriented but wish to evolve towards a service approach, combining the two offers, may follow distinct service strategies by incorporating after-sales service, customer support, outsourcing partners or a development partner. When companies opt to become an after-sales service provider, their initial efforts will be dedicated to offering clients competitive prices for products and services, which are usually fostered by economies of scale and manufacturing efficiency (Gebauer 2008). Thus, an after-sales provider company will try to focus on cost leadership in order to achieve a competitive advantage and excel among its rivals (Gebauer 2008). A company that aims to adopt a customer support strategy and become a customer support provider tends to offer a clear value proposition based on a reliable product as well as a differentiating service, a solution that is usually process-oriented and centred on each customer's specific needs (Gebauer 2008). In turn, outsourcing partners is a service strategy that tries to bundle products with services that have an average level of differentiation along with cost leadership, in an attempt to offer a good value for money proposition in terms of product and service, thus decreasing the customers' financial investment whilst managing the inherent risks of the proposal (Gebauer 2008). Conversely, a development partner strategy is mainly focused on a customer-centric proposition that enables customers to reach better process performance, due to the research and development of customised services that aim to contribute to service differentiation through the use of after-sales and process-oriented services specially designed for the customer (Gebauer 2008).

According to Shankar, Berry, and Dotzel (2009), companies that intend to offer hybrid solutions should always bear in mind four distinct rules related to differentiation, scalability, pricing, and branding. When products or services are perceived as commodities, one way to increase their value in the eyes of the customer is to add a high-quality service or product (depending on the commoditised item). However, if hybrid solutions provide answers to severe problems, they will offer the company a unique and sustainable advantage because competitors may not be able to imitate it and customers will perceive switching costs as being extremely high. Whenever it is possible to improve the quality of the service, human interaction can transform the service into something extremely distinct, making it difficult for the customer to find an alternative. Regarding economies of scale, the authors argue that building them may improve the financial performance of the company because it enables it to blend different services in a specific location, decreasing the overall cost of offering a hybrid solution. In addition, in order to assess the financial outcomes of different hybrid propositions, managers need to analyse the best and most profitable ways to bundle services and products for distinct markets. After concluding that the company has a viable hybrid offering to a particular market, managers should try to enhance the value through branding since the brand usually contributes to a halo effect of a hybrid proposal.

In conclusion, over the years, manufacturing companies have focused their business strategy mainly on new product development. However, ever-increasing competition combined with the need for innovation and expansion of activities to host markets has led product-oriented companies to incorporate services into their offers. This seems to result in hybrid propositions that tend to be perceived by customers as value-added solutions which may help them accomplish specific tasks quickly.

Materialising Service Innovation

Bettencourt, Brown, and Sirianni (2013) claim that true service innovation may originate from shifting the focus away from service solution back to the customer. The authors propose that instead of asking, “How are we doing?” companies need to ask, “How is the customer doing?” Many businesses look at the service innovation concept through the lens of incremental innovation of the current services. However, looking merely at the present services restrains the company’s innovation capabilities by limiting the new notions.

Service innovation has become the source of a competitive advantage for many companies which transform the customers’ collected data into meaningful and distinctive services. Offering timely services does not differentiate companies anymore; instead, companies need to create innovative services that offer more value to the customer. Chesbrough (2005) indicates that creating such an innovative service is not easy, and this is due to two facts: the intangibility of the service activity and the active involvement of customers in generating the service offering. Berry, Shankar, Parish, Cadwallader, and Dotzel (2006) argue that many service improvement activities are incremental, like extending the opening hours of stores, creating online stores alongside the physical store, and offering loyalty cards. The improvement limitations of the current approach results from companies trying to enhance the service at the design or implementation stage (Thomke 2003). Revolutionary services require genuine innovation rooted in real customer needs rather than just improving the current services (Bettencourt et al. 2013), and companies have to look at the long-term relationship with their customers.

To offer innovative services, companies need to expand their vision beyond the present services in order to meet the essential needs of their customers, including the jobs that customers were trying to do and the output they used in order to measure success (Heskett 1987). When businesses alter their focus from service solution and revert to their customers, they can create value through co-creation which has two-fold benefits that are both meaningful to customers and exclusively differentiated from the competitive offering (Gummesson 1995). As different scholars argue (e.g. Christensen, Cook, and Hall 2005; Bettencourt 2010; Bettencourt et al. 2013), current service improvements limit innovation by focusing on service as the unit of analysis instead of looking at the fundamental needs of customers.

Leonard (2002: 4) argues that "customers can say what they want if they are asked to make selections within a familiar product category". The author cites a number of examples, among them, Nissan Design's understanding of how US customers wanted their new cars to smell or how the loyal customers of Harley-Davidson wanted the engine to sound like. Customers in these cases were able to contribute and express what they wanted because of their extensive experience with the product category and their educated and sophisticated tastes. Alternatively, if customers were requested to offer suggestions for new products or give opinions in an area with which they had limited or no knowledge, they would have faced two kinds of blocks: firstly, "what psychologists call functional fixedness, the human tendency to fixate on the way products or services are typically used, making people unable to imagine alternative functions" (Leonard 2002: 4); and, secondly, when customers have difficulty in considering a solution due to their contradictory needs. Kimberly-Clark faced this challenge when parents commented that they did not want their toddlers to wear diapers anymore whilst at the same time not wanting their child to wet their bed, the problem which the pull-up diaper aimed to solve. The appropriate solution to deal with these two mental blocks is to ask customers to focus on the desired outcomes which can help companies identify difficult-to-articulate needs (Leonard 2002).

The other technique that Leonard and Rayport (1997) introduced to handle these types of situations was behavioural observation. This is similarly beneficial in realising what customers are trying to achieve when they are unaware of their behaviour so that the observation can assist in revealing their unstated needs. The authors also argue that the role of the customers' voice is critical, albeit distinguishing the difference between what customers express and want, whilst acting upon the implicit needs and demanding tactics beyond just listening.

Bettencourt et al. (2013) developed an approach to innovation that allows companies to identify opportunities for breakthrough service offerings which are not constrained by current or proposed service solutions. Their approach is a job-centric approach that focuses not only on the customer's assessment of the current offerings but also on the jobs that the customers are hoping to get done. This approach is based on the idea presented by Ulwick (2002) and Bettencourt and Ulwick (2008) which looks, in much detail, into the reasons customers currently hire service solutions and give them a broader view about related jobs and processes.

Bettencourt and Ulwick (2008) argue that people "hire" products to get jobs done, such as hiring word processing software to create documents or scalpels to remove soft tissues. Companies require a new way of listening to their customers that could take the form of a "radical shift from customer-driven to customer-informed innovation" (Ulwick 2002: 1) because "imagining the unimaginable is for R&D departments, not customers". In order to spur creativity, companies need to discover the desired outcomes of the customer rather than the solution. The answers obtained will form the platform for change and transform innovation from serendipity into rigorous discipline (Ulwick 2002).

The job-centric approach of Bettencourt et al. (2013) for service innovation involves four steps. The first step is to have an active partnership with customers so as to discover what jobs they are trying to complete by hiring the service in the first place. The second step is for service providing companies to delve into and highlight whether these jobs are part of some greater process which can be tapped into to create additional customer value. The next step is learning about the existence of the current opportunities that can get these customers' jobs done. For example, realising real customer needs to confirm that their feedback is not only accurate but also practical for directing a valid service innovation (Bettencourt et al. 2013). Finally, step four entails detecting and employing the company's resources in constructing and designing value for the company and its customers in order to attain credible service innovation (Bettencourt et al. 2013).

Companies quite often face a shift in demographics, new rivalries, emergent technologies, new rules and regulations or market effects that were not projected (Day and Schoemaker 2005). So, the following questions are possible: "How companies can see these changes and capitalize on them?" and "How they can avoid being blindsided?" These trivial signals usually start at the periphery, "the blurry zone at the edge of an organization's vision. As with human peripheral vision, these signals are difficult to see and interpret but can be vital to success or survival" (Day and Schoemaker 2005: 136). Companies need to increase their vision to be able to detect opportunities that are on their blind side or develop a company-wide peripheral vision. As proposed by Bettencourt et al. (2013) and argued by Ulwick (2002), this new approach focuses on the results that customers are hoping to achieve in getting the job done irrespective of the selected method to accomplish it.

The job-centric model of Bettencourt et al. (2013) refers to the innovation approach of the study of Berry et al. (2006), arguing that there are two distinct service innovation fronts which companies have to take into consideration: innovation in how the service is delivered and innovation of the new offerings that satisfy the core benefits being sought by service customers. After referring to the concept of service-dominant logic of Vargo and Lusch (2004), Bettencourt et al. (2013) claim that their own proposed model for innovation also involves looking differently at customers and altering the view from user and buyer who seeks "value-in-exchange" to the co-creator of value and to "value-in-use". The authors' model gives customers an active role in service creation, shifting the mindset of the customer who is perceived as a passive recipient of a service to a key player in the creation of the value (i.e. the co-creator of value).

The problem with most traditional innovation frameworks is that they are locked up with the idea of improving the current product features rather than expanding them into services (Bettencourt et al. 2013). The proposed model of Bettencourt et al. (2013) detects the unmet needs of the customer regardless of the solution selected to fulfil them, which can be an approach to assist product companies discover value-added opportunities, leading them to discover consumption processes and patterns which complement the jobs that the current products are being used for. Through this acquisition process, the company can discover if this need is part of a more extensive process or job that can be met by the current products, eventually assisting the company to realise those outcomes which are most unmet (Bettencourt et al. 2013). The detected outcomes are the most promising opportunities to offer service innovation and a chance to develop a strong relationship with the customers (Bettencourt et al. 2013).

Companies need to think out-of-the-box for service innovation and look at the real needs of customers and the results they aim to achieve by utilising the hired services (Bettencourt et al. 2013). Through this approach, companies will focus on customers and their unuttered needs, thus, when the emphasis is on the customers' job and not the service, the strategies followed by companies in service innovation become organised and anticipated, and in addition satisfactory for both the company and its customers (Bettencourt et al. 2013).

Experience Marketing

Experience marketing is an enticing new concept both in academia and the market (Schmitt 2011). By looking at the past decades' product or service offerings in different sectors, from Apple products to Jet Blue, Mini Cooper to Abercrombie & Fitch, one can see that brands are creative and innovative in marketing to consumers (Schmitt 2011). In his book "Experience Marketing", Schmitt (2011) states that the current approaches of brands are appealing to customer senses because they are more emotional than rational and they tend to target the utilitarian notions of value.

Experience can be categorised in two ways: the first refers to past "knowledge and accumulated experiences over time", and the second, to the present "ongoing perceptions and feelings and direct observation" (Schmitt 2011: 60). The author also refers to the experience in business vocabulary and mentions that in the marketing context, experience is the sense of collected knowledge whilst another usage is direct observation or necessity. As Schmitt (2011: 60) indicates, the experience refers to "perceptions, feelings, and thoughts that consumers have when they encounter products and brands in the marketplace and engage in consumption activities as well as the memory of such experiences".

One of the pioneering academic articles in experiential marketing is by Holbrook and Hirschman (1982). The authors argue that consumption has started to be viewed as a constant stream of consumer fantasies, feelings and fun, and state that the dominance of the information processing perspective overshadows consumption phenomena such as leisure actions, sensory pleasure, daydreaming, aesthetic fun and emotional responses. This perception looks at consumption as the primary subjective state of consciousness with different symbolic meanings, hedonic responses and aesthetic criteria, and which is powered by the contrast between information processing and experiential views.

Schmitt (1999) compares traditional marketing with experiential marketing arguing that the former looks at the consumer as a rational decision maker who considers the functional features and advantages of products, whereas the latter perceives the consumer as a rational and emotional human being who cares about acquiring pleasurable experiences. The author concludes that the final objective of experiential marketing is to build holistic experiences that incorporate individual experiences into a holistic form (Schmitt 1999).

In line with this definition, Schmitt (2011) indicates that experience marketing is mostly described as any customer-focused marketing activity that makes a connection to customers, from products, packaging and communication to offline and online activities. Gentile, Spiller, and Noci (2007: 397) also look at the conducted research on experiential marketing and provide a state-of-the-art literature review, which define it as follows (references in this quote are omitted):

> The Customer Experience originates from a set of interactions between a customer and a product, a company, or part of its organization, which provoke a reaction. This experience is strictly personal and implies the customer's involvement at different levels (rational, emotional, sensorial physical and spiritual). Its evaluation depends on the comparison between a customer's expectations and the stimuli coming from the interaction with the company and its offering in correspondence of the different moments of contact or touch-points.

In experience marketing, value does not merely inhabit the object of consumption, the search for and the processing of information, it similarly manifests the experience of consumption (Schmitt 2011), which the research of Gentile et al. (2007) segregates into hedonic and experiential value as opposed to the utilitarian and functional value. Their study confirms that a related section of value proposed by the companies to customers is connected to the experiential features of what is lived as a positive consumption experience irrespective of the context. An emotional bond is formed based on the customer who is living a positive experience and the company's brand leading to customer loyalty, which encourages companies to practice strategy balancing between the hedonic and utilitarian values (Gentile et al. 2007).

Schmitt (1999) introduces five types of experience marketing approaches, inclusive of sense, feeling, thinking, acting and relating. The author describes them as strategic experiential modules (SEMs) to be employed by marketers. Taking this into account, Gentile et al. (2007) present six experiential components: sensorial, emotional, cognitive, pragmatic, lifestyle and relational. However, they were not empirically tested. Brakus, Schmitt, and Zarantonello (2009) categorise several experience dimensions and propose a brand experience scale which covers four dimensions – sensory, affective, intellectual and behavioural – which are invoked by various brands studied in their paper.

Using these four dimensions, Zarantonello and Schmitt (2010) conducted a field study to validate whether various consumers preferred different experiential appeals, in which they discovered that five kinds of consumers exist: hedonistic, action-oriented, holistic, inner-directed and utilitarian. Considering this finding, the authors conclude that holistic consumers are located at one extreme with interest in all aspects of experience, while utilitarian consumers are at the opposite end of the extreme with no attachment to brand experience. The authors indicate that the remainder reside between these two ends of this extreme and are viewed as "hybrid consumers" or hedonistic consumers with significant attachment to sensorial gratification and emotions, action-oriented consumers with an attention to actions and behaviours, and finally the inner-directed consumers with a concentration on internal processes like sensations, emotions, and thoughts.

Referring to the above brief look at the research of experience/experiential marketing and Schmitt (2011), it can be perceived that in the studies of experience marketing there are some unanimities which recommend conceptualising experiences in conjunction with multiple experience dimensions that include sensory-affective, cognitive-intellectual, and behaviour and action-oriented components. However, it is essential to consider that customers may be influenced by experience staging during at least one of the three moments when they interact with the company: pre-sales, purchase and consumption (Candi et al. 2013). Thus, in the case of products, the experiential value may be created using new product innovations or staging an experience during the buying process where elements related to function and hedonism may be combined in order to create experiential value (Candi et al. 2013). In order to benefit from innovation through staging experiences, companies need to take into account that this motivation should be in line with their overall strategy (Candi et al. 2013).

According to the research findings of Candi et al. (2013), innovation through experience stage can be used not only by big companies or those related to hedonic activities but also by SMEs from distinct industries which seem to rely on experiences to achieve a competitive advantage. It can be concluded that generally, the behaviour of people and specifically consumers is an intriguing and continually complex consequence of multidimensional interactions between organism and environment, which in this dynamic process neither problem-directed nor experiential components can safely be ignored (Holbrook and Hirschman 1982: 139). Therefore, companies should not neglect the experiential aspect of consumption, regardless of offering products or services, or bundling both.

Conceptual Development

Experience Economy

The experience economy concept was first introduced in the business strategy literature in 1998 by Pine and Gilmore but it only became widely known after the publication of a book with the same name in 1999 and subsequently it has been referenced in more than 3,500 articles and books (Freire-Gibb 2011). Since the release of their book "The Experience Economy", Pine and Gilmore (2011) state that experience thinking has been better accepted in three distinct areas: experiential marketing, customer experience management and digital experience. Almost 50% of all the publications have focused on the fields of business, administration and economics; only after 2004 has research on tourism and culture devoted more attention to the topic, especially regarding planning and local economic development in Denmark (Freire-Gibb 2011).

In an increasingly globalised world overwhelmed with goods and services that are becoming undifferentiated, it seems that staging experiences is the best solution for companies to create value, increase revenues and generate more employment, leading to a shift from an economy based on goods and services to an economy ruled by experiences (Pine and Gilmore 2011). According to the authors, although experiences have always been a part of business activities, only recently have companies been able to disentangle experiences from products and services, transforming them into an economic output where the consumer is willing to pay "to spend time enjoying a series of memorable events that a company stages, as in a theatrical play, to engage the customer in an inherently personal way" (Pine and Gilmore 2011: 3).

Although companies have been offering experiences along with their core products or services, they do not tend to charge for these experiences (Pine and Gilmore 1998). Since experiences seem to be distinct from goods and services, Pine and Gilmore (1998) argue that they should be promoted and sold as a clear economic offering, leading to the experience economy.

One of the main reasons why the authors defend the emergence of this fourth stage of economic progress relates to the increasingly perceived commoditisation of goods and services which can be balanced through the adoption of experiences as a way for companies to differentiate themselves from competitors, independently of the market in which they act (i.e. B2B or B2C) (Pine and Gilmore 1998).

Despite the fact that many companies tend to sell their products or services embedded in experiences, Pine and Gilmore (1998) state that companies should disentangle the latter, designing them as distinct offerings that will lead customers not only to perceive experiences as different propositions but also to understand and be willing to pay for this distinct value proposition. Experiences can be defined as something remarkable and personal that companies reach when they "use services as the stage, and goods as props, to engage individual customers in a way that creates a memorable event" (Pine and Gilmore 1998: 98). With ever-increasing new technologies and innovations, experiences can be detached from physical places like amusement parks, museums or theatres, what the authors call stages, and be delivered and experienced in a virtual world (Pine and Gilmore 1998). According to Pine and Gilmore (1998), depending on the level of connection and participation established with the customer, experiences can be divided into four different categories – entertainment, educational, escapist and aesthetic – which when combined in one single realm can be perceived as the most valuable experience.

Notwithstanding the fact that the experience economy is in an early stage of development, Pine and Gilmore (2014) maintain that throughout the world there has been an increasing number of business offerings focused on promoting experiences that aim to engage customers in memorable events which should be considered economic outputs, instead of simple add-ons to a company's products or services. A company that aims to enter the experience economy needs to understand that revenues and profits need to be generated by the experience per se, not by the services and/or products used to set the event (Gilmore and Pine 2002).

Companies that seek to become part of the experience economy should be driven by five value-creating opportunities: customising goods, enhancing services, charging for experiences, fusing digital technology with reality, and transformative experiences (Pine and Gilmore 2014). They require an understanding of customers' wants in a more personal way in order to be able to use mass customisation to produce and offer what customers want, and when they want it (Pine and Gilmore 2014). Companies that shift their mindset from service to experience should transform the marketplace into a theatre where everyone plays a role, including the employees who are continuously on the stage (Pine and Gilmore 2014). Additionally, companies need to charge explicitly for the experience per se, so that customers can value the time they spend at a particular place or event and perceive the experience as the primary value proposition of the company (Pine and Gilmore 2014). Through the integration of digital technology, companies can combine and fuse the real with the virtual, enhancing the experience of customers which may be transformed into something more lasting than a mere memory: a way to enrich and improve every single experience (Pine and Gilmore 2014). As regards the hospitality and lodging industry, Gilmore and Pine (2002) argue that companies should intentionally use their services as a way to stage the experience where products act as the support for embracing customers in a personal and individual event, an experience that needs to be associated with an admission or access fee (Gilmore and Pine 2002).

According to Binkhorst and Dekker (2009), one of the leading and growing sources of experiences is related to tourism activities where the creator or designer of the experience includes tourists as an active part of the entire process. This is particularly true in developed societies where customers are trying to enhance their quality of life through the consumption of activities related to leisure and tourism. If managers consider tourism "as a holistic network of stakeholders" that are all involved in the experience and its environment, companies will develop a proposition where tourists perceive themselves as active participants, providing a more genuine interaction with the rest of the actors involved in the creation of the experience. Within the tourism experience network approach, tourists are part of the process and considered as human beings with specific/individual values and needs.

The literature reveals that most of the time, the production of experiences has been related to, and studied from, specific perspectives such as leisure, tourism and culture (Sundbo 2015). Over the years, with the introduction of the experience economy concept in the late 1990s, academics have become more interested in understanding how companies can use experiences, not as an add-on to services or products but as an output that enables them to achieve profits (Sundbo 2015).

According to Sipe (2016), companies that focus on experiences as an economic output are generally neglected by innovation research in business, which seems to centre its attention mainly on new product development resulting in a gap in the literature concerning innovation from the experience economy viewpoint. Despite the increasing interest in hospitality and tourism by academics and practitioners, who are becoming more aware of the creation of unique value propositions based on the experience economy, the study of Sipe (2016: 81) reveals that managers tend to perceive experience innovation as something that “requires attending to service standards and incremental improvements of existing offerings”. It is crucial that companies do not neglect the aspects that make the experience unique for the customer who needs to perceive it as something valuable and unique.

Researchers and practitioners need to perceive experiences as an independent industry that aims to provide a “mental journey” for their customers, leading to a memory, something that is “more immaterial and intangible than services” (Sundbo 2009: 433). Through the use of technology, especially Information and Communication Technologies (ICTs), experiences may be stored, transported and exported to any part of the globe (Sundbo 2009). According to the author, it is essential to stress the fact that in order to fully understand the impact and relevance of experiences in economy and sociology, one needs to be aware of three issues. First, a society tends to seek unique and exclusive experiences. Secondly, companies try to produce innovations through the use of creativity and technologies (namely ICTs) which tend to help companies to develop new kinds of experiences that can be mass produced. Thirdly, systematising the innovation process enables companies to be more efficient.

On the other hand, Binkhorst and Dekker (2009) argue that most companies tend to pursue innovation by using a product-centric approach ruled by an attempt to identify and understand consumers’ needs and wants, which compromises the opportunity to engage with potential customers in the process, generating more value for both parties. The authors further argue that companies should base their experiences on a personal perspective since the interaction between companies and customers can be focused on a specific time and place that may result in the co-creation of an experience that is perceived as unique and valuable.

Morgan, Elbe, and Curiel (2009) claim that the experience economy had previously been considered by academics and practitioners as product-oriented and superficial due to the extended use of examples from the entertainment sector, as evidenced by the well-known example of Disney. Tourism has been largely associated with the experience economy, mainly because it tends to show that consumers seek more than functional aspects offered by services: they are interested in memorable events that usually surround these services. In an increasingly competitive market, manufacturing and service companies may use experiences as a means to engage customers since people tend to be willing to pay more for something that is perceived as unforgettable, despite being intangible and having immaterial characteristics. Therefore, in order to avoid the artificial aspects of experiences, companies need to stage them in a way that will lead consumers to recognise experiences as related to a specific context, enhancing their authenticity (Binkhorst and Dekker 2009). Within the experience economy context, companies' offerings and consequent value propositions should be created and innovated through a process of co-creation where "customers interact with the company and generate their own experience" (Binkhorst and Dekker 2009: 313). Consequently, the experience economy seems to be a broad construct that involves industries outside of the entertainment, culture or tourism sectors and one that is driven partially by individuals who seek a way to adopt an identity that may allow them to become part of an increasingly wealthier society (Lorentzen 2009).

Although practitioners over the years have become increasingly aware of the relevance of experiences as a means to provide value propositions to their customers, most of the time, they have failed to understand the broad scope of experiences which go beyond offering solutions based on entertainment (Berry, Carbone, and Haeckel 2002). Companies need to understand that customers tend to value distinct benefits which are related to the functional and emotional features of the offer but which depreciate the value of their propositions (Berry et al. 2002). In order to avoid this trap, the authors propose that companies need to be driven by customer experiences which are more complex and more difficult to imitate and which allows them to add an emotional aspect to their offer, creating a competitive advantage based on differentiation.

Van Boven and Gilovich (2003) came to the conclusion that experiential purchases are driven by an individual's desire to acquire and live an experience which, although physically impossible to retain, will be transformed into a memory. Moreover, their research findings show that people with higher levels of income and education are seemingly happier when buying experiences rather than goods.

Although most of the literature on the experience economy is focused on business, administration and economics, some scholars have increasingly devoted their attention to tourism and culture since 2004 (Pine and Gilmore 2011). As a result, experience thinking has been accepted and implemented in experiential marketing, customer experience management and digital experience. More recently, companies have been able to unbundle their offers and promote experiences as a separate part of their propositions and strategy, thereby creating value through "the stage" of experiences that customers are willing to pay for. According to the authors, companies in the experience economy sell the outcome that results from the combination of goods and services, transforming a single encounter into an engaging one. In an increasingly globalised world where goods and services may be perceived as commodities, companies will tend to use experiences to differentiate from rivals and achieve a competitive advantage that is not based on costs/prices.

Nevertheless, it is critical to stress the fact that experiences should be individual and memorable where customers are actively involved, which allows them to perceive the experience as authentic and specifically designed according to their values and needs. Since experiences are something immaterial and memorable, companies may use technology, especially ICTs, to mass produce these moments, and store and distribute them worldwide.

In conclusion, functional and emotional features tend to depreciate the value of a company's proposition when it is based on products or services. In order to avoid such a trap, companies should be driven by customer experiences fuelled by happiness and co-creation.

Innovation in Experience Economy

In an interview with Harvard Business School Working Knowledge, LaSalle and Britton (2002) state that providing satisfactory customer services to customers does not differentiate companies from their competitors anymore; instead, companies must build value-adding experiences around their product offerings. The authors of "Priceless: Turning Ordinary Products into Extraordinary Experiences" published by Harvard Business School, express that as people progress and grow as human beings they similarly evolve as consumers. This occurs for two reasons: firstly, when an extraordinary product like a VCR becomes ordinary, and secondly, when the meaning of value alters or expands, for example, the convenience of having a vacuum cleaner or a house cleaning service. Referring to these phenomena, the authors assert that during the twentieth century people experienced three periods where these two kinds of evolution happened on an enormous scale. The first period took place at the beginning of the century and was mainly product-centric, the second was around the 1960s and was service-centric, and the third period, which is still currently happening, focuses on the complete customer experience.

In an increasingly competitive market, companies should look for more valuable innovation by exploring experiential benefits, instead of focusing their attention merely on aspects like functionality and technology (Candi, Beltagui, and Riedel 2013). In this context, staging experiences may be considered as a promising strategy for companies that seek to improve their competitive advantages through the creation of new offerings which combine innovation with experiences.

Since Pine and Gilmore introduced the concept of the experience economy in 1998, constructs like experience marketing and innovation in the experience economy have been explored by different scholars, such as Berry et al. (2002), Van Boven and Gilovich (2003), Gentile et al. (2007), Sundbo (2009), Schmitt (2011), and Sundbo (2015). However, as the authors of the current paper know, heretofore scholars were not able to fully understand the role played by innovation in the experience economy. Based on the concepts presented earlier in the literature review section, the authors propose a conceptual model where value is at the centre of experiences, services and products which are the three vertexes of the experience-dominant logic framework. The model shows the synergy between products, services and experiences.

As shown in Figure 2-1, companies that aim to offer hybrid solutions (HS) tend to combine services and products in one single bundle, resulting in value for customers that seek answers that will enable them to get their jobs done efficiently. In turn, when companies focus their efforts on innovating through products, i.e. New Product Innovation (NPI), they should be able to do it through experiences. The authors believe that experiences should be the mindset that commands the offering of a new product, thereby allowing companies to create valuable propositions. A good example of the right side of the model is the case of Renova, a Portuguese manufacturing company that shifted its strategy from originally selling toilet paper to now offering well-being. Renova adopted the guidelines of Pine and Gilmore (2011) by changing the company's approach to provide a different customer experience while using its products. The left side of the model shows that, through New Service Innovation (NSI), companies which used to focus on services will now need to change their strategic thinking towards experiences that are valuable to customers. This is due to the fact that these experiences are perceived as unique, memorable and individual offerings, especially designed for each human being with the introduction of co-creation as part of the innovation process.

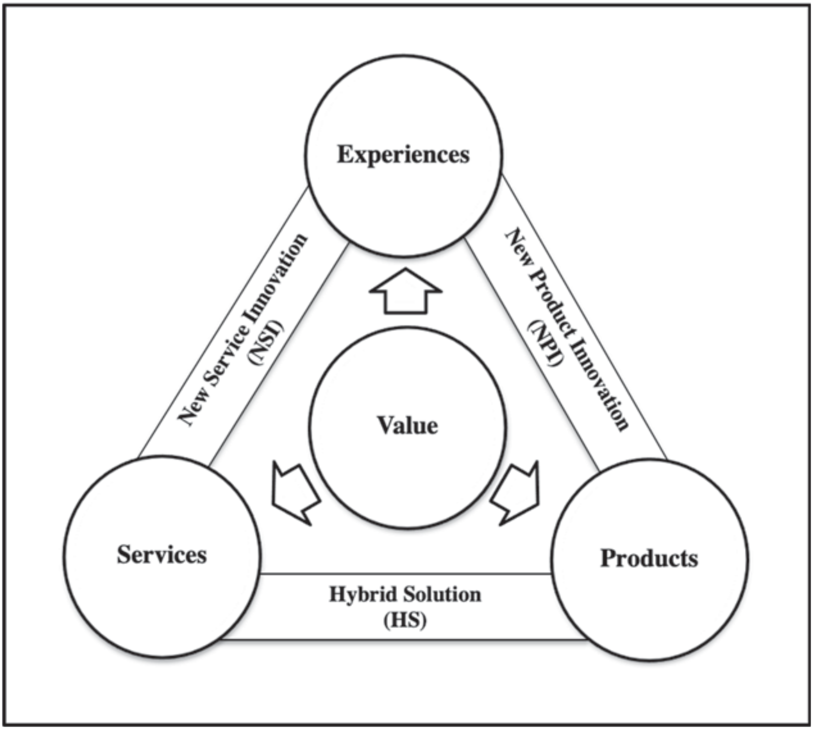

Figure 2-1 Conceptual Model, Innovation in Experience Economy
Source: Authors' Analysis

Accordingly, the authors of the current paper propose that companies which seek a competitive advantage based on differentiation must fuel their strategy and approach to the market with an offer that combines at least two vertexes of an experience-dominant logic framework. Companies wishing to excel and provide a functional, emotional and memorable proposition should ride on the synergy of combining products, services and experiences in one single and unique offering.

Conclusions

The wide range of company offerings can be fitted into three value propositions: products, services and experiences. Since the beginning of the twentieth century, companies, organisations and businesses around the world have offered products and services and combined them to innovate and offer a valuable proposition to customers. It seems that mass production of pure products made companies fall into the commodity trap where goods could easily become obsolete. This led many companies to introduce services on top of their products so as to entice more customers. However, somewhere in the process, some companies understood that services were becoming increasingly relevant and decided to shift their business strategy by unbundling services from the products and charging for both offerings separately. More recently, companies have started to consider another option: the hybrid solution that combines products and services in one single bundle.

In an increasingly globalised market where goods and services seem to be perceived as commodities, some companies have opted to pursue a new avenue: the experience economy, a concept initially introduced by Pine and Gilmore in 1998. In this new phase, companies now aim to provide unique, memorable and individual experiences to customers worldwide through the use of innovations, such as ICTs, which allow people to become an active part of the process, mainly by co-creation.

Based on the literature, the authors of the current paper have developed a conceptual model that is supported by the experience economy concept where products, services and experiences are the means that companies should use to achieve a competitive advantage grounded in differentiation. Within this model, the authors believe that New Product Innovation, New Service Innovation and Hybrid Solutions are the channels through which companies can reach each vertex of the triangle (i.e. Products, Services and Experiences). When these channels are combined, this will allow companies to obtain a valuable, memorable, unique and individual offering devoted specifically to each customer.

Limitations and Future Avenues

Since the outcome of this paper is a conceptual model that has not been empirically tested and was built on the concept of the experience economy, scholars and practitioners should be aware of the limitations that are intrinsically related to the lack of validation of this framework. Furthermore, the present study was not intended to develop a broad scale for introducing the experience economy in different industries. Another limitation of this paper relates to the absence of a broader discussion and research in academia concerning the experience economy.

The authors strongly recommend that future research entails the exploration of whether certain types of experiences, not necessarily an extraordinary experience, can be considered as a credible customer experience. Studies in a specific industry other than entertainment or culture, leisure and tourism, would contribute greatly to this area of research in the experience economy.

PART II –

BRANDING, IDENTITY AND PRODUCT-SERVICE DESIGN

CHAPTER THREE

OLD SPECIES, NEW PRODUCTS: CREATIVE SEAFOOD AND SUSTAINABILITY

JORGE RAMOS, PEDRO G. LINO

Introduction

Quite recently the European Union's new common fisheries policy (CFP) determined that from the start of 2019 all fish caught by European fleets must be landed (Veiga et al. 2016). This issue is far from consensual (García-Rivera et al. 2015), but nevertheless the law is now under enforcement (de Vos et al. 2016). This landing obligation seems to be an important step towards the reduction of the waste of biological resources that come from the sea (Salomon et al. 2014).

Apparently, the decision taken could benefit the stocks of traditionally preferred seafood species by forcing fishermen to take measures to decrease by-catch (i.e. fish that are caught but were not targeted species). However, in the initial stage during which the improvement of selectivity is being optimised, a significant amount of by-catches must be landed (Prellezo and Curtin 2015). The dilemma then is that in order to protect particular exploited resources, other species not easily absorbed by the market must also be landed (Villasante et al. 2016). Thus, the problem is what to do with these by-catches (Borges and Lado 2019). They are good for sustainability but not for business. This is simply because it is not easy to preserve everything that comes from the sea (Damalas 2015). There is neither enough infrastructure prepared for such a challenge, nor the capacity to work efficiently in this way (Penas and Lado 2016).

There are several examples of using less valuable seafood species for either animal or human consumption. Some have been more successful than others (Borges 2015). Examples of complete failure (Valentinsson et al. 2019) and fruitful success (Andersen and Ståhl 2018; Guillen et al. 2018) can be found.

In order to face this new paradigm in species landing, new ways to solve the aforementioned problems need to be found – i.e. by bringing all the fish onboard and landing them, what can be done with the low-value species and where can the surplus be stored? By contrast, where there is a supply value chain set up (Dodd and Bouwer 2014), what happens when supply of the main raw material ceases or diminishes drastically? The consumer clearly needs to be informed, but to what extent?

The objective of the present chapter is to try to suggest to decision makers some potential ways to deal with the issues of compulsory landings and seafood species that suffer from a marketing problem of diversified origins. This chapter aims to rationalise how the less sought-after finfish species and related processing solutions can be used in a creative manner to suit consumers' needs and even create new markets.

When Less Desired Seafood Becomes More Valuable

Some seafood species have a low market value due to several reasons. For instance, they might be tasteless, or people simply might not wish to consume them because of cultural, economic or other reasons. People might be suspicious about the taste of a species or have a lack of confidence due to fears of toxic or poison compounds found in seafood's edible parts.

Cod and Hake Issues

When dealing with less valuable seafood species, several different disciplines are relevant. Of these, marketing is a valuable example. The desire of marketers is to find strategies to sell the product, whatever it is (Clemons 2019). In order to succeed, marketers need to find ways to influence consumers to buy a less desired seafood product.

When Atlantic cod started to become scarce in the late 1980s and early 1990s, there was a need for a moratorium (Myers et al. 1997). Several cod-consuming countries faced restrictions and were forced to alter their consumption habits (Cook et al. 1997). Portugal – the largest cod consumer per capita in the world – suddenly faced the absence of this raw material in the market (Bjørndal et al. 2015). The initiative was taken to supply another species that was then traded as cod. However, consumers noticed the change and complained. As a result, this misinformation to the consumer was forced by law to be corrected from the common name of "cod" to "Pacific cod". Possibly due to political pressure from Atlantic cod producers, Pacific cod in Portugal was then changed to other names: *escamudo* or *paloco* (*Gadus macrocephalus*, *Pollachius spp.*). The main issue was quality:

Atlantic cod is of a higher quality and had greater acceptance and, as a result, its price was higher, whereas the Pacific cod is inferior. By comparing both species, the differentiation can easily be detected, even by a non-specialist. Portuguese consumers at that time felt, to a certain extent, that they had been fooled (Carvalho et al. 2017). There have also been other mistakes, such as with the European sprat (*Sprattus sprattus*), which is a low-value species that has been traded as the more valuable European anchovy (*Engraulis encrasicolus*). Such biased information provided by the sellers could be seen as a marketing strategy, a simple translation mistake, or mislabelling (Mariani et al. 2015).

Historically, the blue whiting (*Micromesistius poutassou*) had almost no value but was still caught in large quantities, particularly by trawling fleets. Curiously, there is a similar – but highly valuable – fish of another genus: hake. Due to traditional highly prized recipes, the blue whiting started to be sold as “little hake”. For producers, what was previously discarded overboard due to its low value now had an outlet, attributing a higher value to this species.

Marketing and Atlantic Chub Mackerel

In Portugal several decades ago, there was a low market value for the pelagic fish commonly known as Atlantic chub mackerel (*Scomber spp.*), caught many times as a by-catch all over the coast (Borges et al. 2001). The target species was sardine (*Sardina pilchardus*), particularly to sell fresh during the summer season when it attained a good market value. It was possible to sell sardine for processing all year around. In the absence of sardine, horse mackerel and the European anchovy (*Engraulis encrasicolus*), rarer and smaller, were also targeted but always attained a good market value. However, in the case of Atlantic chub mackerel, the value was too low and if it was envisaged to potentially catch any of the previously mentioned species later in the early morning, the whole catch of Atlantic chub mackerel already stacked on the deck was sometimes discarded due to the absence of an outlet. Presently, however, it is now amongst the most important species caught in Portugal (FAO 2019).

Originally, there were too many negative points attached to Atlantic chub mackerel. During the Estado Novo (dictatorship time), Atlantic chub mackerel was considered the fish for the poor because it was not very well appreciated. This species was also not welcomed by fishermen due to its capacity to entangle fishing gear (particularly hook lines and nets). More recently, after a sardine scarcity in the 1990s, Atlantic chub mackerel became a target species, not only because its stocks were in a good state, but also because it was found that it was valuable in terms of healthy fats, namely the omega-3 Docosahexaenoic acid (DHA), which is very important for human health (Nunes et al. 2014). As a result of multiple efforts to promote this species involving cuisine chefs creating healthy recipes using this raw material, it was possible to attain a better value for it in the market. Marketing manoeuvres were crucial for this success. Fish processing plants started to include the Atlantic chub mackerel as a new raw material in their production lines, particularly in the canning industry (Feijó et al. 2018). Meanwhile the market for tuna fattening in Mediterranean farms blossomed and several species were given to feed the tuna, including the Atlantic chub mackerel (Chase 2002). At the present time, Atlantic chub mackerel is found in gourmet cuisine.

Seafood Availability Changes: Two Brief Examples

During the 1960s, herring (*Clupea harengus*) found in northern waters suffered from intense fishing efforts (overfishing), putting this species on the verge of extinction (Toresen and Østvedt 2000). Due to the protection measures taken, stocks recovered and now are abundant once again. As a result, its market price is low, even when caught in northern Europe, and it is being used also to feed tuna species in Mediterranean farms (Vita and Marin 2007).

When certain countries become more developed, fish commodities that were previously exported elsewhere gain value and start to be consumed domestically. This is the case of the Chinese catfish (*Pangasius spp.).* China was a major player in catfish aquaculture and exported this commodity mostly to western countries. Presently, catfish is mainly used for domestic consumption in China and, because the Chinese market is the largest worldwide, there is almost no catfish elsewhere (Zhong et al. 2016).

Marketing Creativity to Deal with Less Desired Seafood

Ugliness and Other Non-Appealing Seafood Features

Providing a fish species with a positive reputation is important, as can be demonstrated by the example of monkfish (*Lophius spp.).* For a long period of time, monkfish was considered an ugly fish without consumers' acceptance when it was sold whole in fish markets (Esteve-Romero et al. 1996). Thus, because monkfish is a large fish, fishmongers started to cut it into strips and chunks to let consumers taste it. Consumers liked the taste, and despite their curiosity in asking what they were eating, they were told that what was important was that they were eating a "new" species (Stockhausen et al. 2012). At the present time, even the monkfish's liver is retained (to be used for adding flavour in Portuguese-style fish bouillabaisse) and the whole fish, including the head, is no longer difficult to sell (Haring and Maguire 2008). Monkfish is now a common product in supermarket freezers, thanks to marketing.

The ugly fish problem can be easily solved by processing the fish (Schmitt 2007). In the 1990s, it was also thought that fishing in deep waters could be a good solution for fish scarcity; there was already technology available to fish deeper. The deep sea seemed to be full of abundant species, even if they were ugly. It was thought that by just chopping off the head and changing the common name, from the marketing viewpoint the problem would be solved (Jacquet and Pauly 2008). However, from the biological point of view it was verified later that it was not sustainable to catch these deep fish species due to their late spawning and low fecundity (Roberts 2002).

Marketing strategies have been used to sell unknown species by simply changing the common name, e.g. from the unappealing "rattail" to the charming "grenadier" (Oliveira and Bechtel 2006). Another example of renaming is the spurdog shark (*Squalus spp.*) and other species of small sharks in the fish and chips industry by changing their common names to rock salmon. Obviously, the fish do not resemble salmon, but it satisfies fish and chips consumers who usually do not care about biological resemblance. A cost of this strategy is related to the overfishing of some species used as rock salmon and consequently the endangering of them (Cotton et al. 2011). One reason for not keeping the common name related to the shark is because it is considered unacceptable nowadays due to the widespread protection of these fish. It could also be related to prejudice against eating shark (Neff 2015).

Another unappealing feature arises with herbivorous species. Usually, these species have a low value attached due to their unpleasant taste. Notwithstanding this factor, by immediately eviscerating an herbivorous fish, it is possible to keep it acceptable to a consumer's taste. The bogue (*Boops boops*) is an herbivorous fish that is traditionally sold in Greece. However, in other Southern European countries the market value is reduced and consequently there is little or no landing at all. Revenue can be gained by either exporting these species to countries where they have a market value or by promoting them through new recipes and marketing (Ciampa et al. 2012).

Undersized and Small Fish

In theory, fishing vessels go out to sea aiming to catch target species. In practice, fishing vessels can effectively catch target species, but also several by-catch species that are discarded (Pauly and Watson 2003).

If a fishing vessel accidentally catches very large quantities of small fish – e.g. boarfish (*Capros aper*) and snipefish (*Macroramphosus scolopax*) – under the new legislation those species must also be landed, not discarded anymore. This problem is solved only if there is the infrastructure to keep the “unwanted” fish. A single large trawler can land several tonnes of tiny fish. Currently, there is no solution for the problem of there not being enough freezing stations.

As soon as a fishing vessel has completely filled its internal capacity in a day, the fishing activity for that vessel should stop and it should return to land the catch. But if the catch is valueless, the vessel will need to return to sea to fish again, in order to compensate for the low profit or eventual financial loss.

Usually, huge quantities of small fish are comparatively less valuable than larger species and the outputs are reduced. Output solutions for the undersized (not legal) or small fish landed are to be transformed into either fish flour or fish meal for aquaculture or the ornamental fish industry. Fish flour should only be processed with seafood leftovers that cannot be used for human consumption. Another possible solution for small fish species is to produce “surimi” (ground meat).

The fish meal issue is very sensitive and problematic. For some authors, it does not make sense to catch fish just to feed to other stabled fish of a similar trophic level (Deudero et al. 2004). This issue is also related to the level of return: in order to produce a commercial-sized gilthead seabream (*Sparus aurata*), it is necessary to provide more than twice as much of its own weight in wild-caught fish as feed (de Francesco et al. 2007). In absolute weight terms, it is more effective and logical for humans to be nourished from the seabream’s food, rather than to feed the seabream with other seafood species.

Cooking Less Well-Known Species

Some species are not well known by the general public. As a result, these species have little to no commercial value. So, such species must be taken to international food fairs and other events in order to be promoted. Blind tasting events are crucial in this sort of promotion in order not to negatively influence those tasting the products. Taste and texture are probably the most influential sensory traits used to promote seafood (e.g. Sylvia et al. 1995; Papadopoulos et al. 2003).

Blind tasting was done with monkfish. Despite having an awful appearance, this fish was chopped into cubes and given to people to taste without any other influence. By not informing the taster (who is a potential consumer), the decision to buy or not was taken on the result of the taste and the disguised aspect to the eye. If both criteria are satisfied, then the taster buys.

Different fish have different shapes and textures, and consequently they need to be prepared for consumption differently. There are some species that are better simply boiled and others grilled, cooked in the oven, or fried. For example, a sardine (*Sardina pilchardus*) is not tasty if simply boiled but it is better when either grilled or fried. It is important to have an adaptation of the product to the consumer. A wide range of recipes, normal and practical, is needed to help consumers to prepare a given fish. In this way, cooking simplicity is very important. Gourmet food is usually not practical in everyday life, unless eating in a restaurant or tapas bar, or on a special occasion. It is important to differentiate.

An octopus needs to be on the stove for a long period of time and a pressure cooker should be used to soften its edible parts. However, shrimps only need a couple of minutes in boiling water and are then ready to serve. These details must be explored by the tourism and restaurant industries in order to develop and be part of the sustainable use of seafood resources.

When a "new" species is introduced into the market, consumers need to know how to handle it. In the Mediterranean, particularly in the eastern part, there have been many invader species from the Red Sea since the opening of the Suez Canal. In such cases, people as consumers first think it is weird to eat unknown (exotic) species, but after some time they become familiar with them and start looking for ways to cook them (Galil 2007).

Nevertheless, aquaculture firms tend to produce what is already well known (Ramos and Ferreira 2019). Thus, in the aquaculture process the issue is not that the species are unknown, but that they can diversify the range of species produced, by descending through the trophic levels and therefore reducing the problem of destabilising the food chain by overfishing (Ramos et al. 2017). By promoting husbandry practices lower down the trophic level, more can be produced. For human consumption, it is worth exploring lower trophic levels to a certain extent, in order to avoid the catastrophic effects of overfishing (Pauly et al. 1998).

Seafood Conservation in Brief

Ancient and Traditional Methods of Conservation

Salting and drying fish is a practice dating back to the old days. For instance, in Portugal, garfish (*Belone belone*), blackmouth catshark (*Galeus melastomus*) and Atlantic horse mackerel (*Trachurus trachurus*) are traditionally sun dried and this can still be a good solution for fish preservation in the future. The industries associated with preserving seafood have shown interest in dehydrated products. There is a wide world market for dried fish products (Aguilera et al. 2003). For instance, in Portugal, the demand for salted and dried cod is increasing (Bjørndal et al. 2016).

Something similar that is quite widespread in North America is the jerky method. Beef slices and strips have any fat removed and are then dried at a relatively low temperature and with salt in order to reduce bacterial contamination (Sampels 2015). Jerky food items are prepared with this method and packed creatively, aiming not only for food readiness but also to appeal to different targets. Jerky food is also facing an increasing demand in countries other than North America. Jerky products are a nutritious, contamination-safe, relatively energy efficient and lightweight food (Kovacevic et al. 2012). Jerky food preservation is based on ancient methods, but it takes advantage of more recent developments in terms of conditioning and packaging.

The Particular Case of Canning

Probably the best way to preserve food is by canning. It is one of the most brilliant inventions of mankind: first, because it is possible to avoid waste (Coimbra 2016), and second, because once canned there are no extra preserving costs. As a preservation method it is far superior to freezing methods, where it is compulsory to expend energy and the preservation period is limited to one year (depending on how low the temperature is). With freezing, there is a lot of energy expenditure and dependence: in the event of an energy failure, all of the frozen fish items are at risk and might get spoiled.

By using canning methods, it is possible to preserve seafood for a longer time, without additional preservation costs. Besides preservation durability without contamination risk (unless a can is damaged and not sealed airtight), canning allows seafood quality to be maintained highly effectively at a low cost and also allows the easy management of shelving for storage.

However, despite being practical, canning methods should not be used exclusively to preserve food for a healthy diet. Research should be directed to other processing and preservation methods, always keeping in mind low or even null energy dependency.

Modern Methods of Conservation

Lyophilisation and other modern methods where there is no energy dependence will be increasingly advantageous in the future. It does not make much sense to preserve seafood species in a way that is always highly dependent on energy. It does not make economic sense because the product becomes increasingly more expensive, because of the energy cost to preserve it and because of the product itself losing its nutritious properties throughout the time.

Lyophilisation is a null-energy-dependency alternative that is already in use, but not widespread. Dehydrated and lyophilised food has already been taken to space stations and it is among the most commonly eaten items there (Paulino-Lima et al. 2010). In space, as in any similarly remote situation, minimising residuals and lowering the risk of contamination is essential. This does not mean that in the future all food will be lyophilised, but it is a preservation method that does not require energy continuously and comes without any loss of the food's nutritional properties (Oikonomopoulou and Krokida 2013).

Selling and Processing Seafood in a Creative Manner

Creative Marketing Alternatives

When loads of by-catch fish are landed, since they have no immediate market, there is no alternative about what to do next. The processing industry itself (machines, workers, etc.) needs to be available to process the landings. The question is how to prepare the whole industry for a huge amount of raw material ready to be processed, when it is highly irregular either in quantity or in species composition?

It is essential that the industry develops a method to save everything instead of wasting resources. When a fish is of an acceptable size, filleting is a good option. But when the size is too small, surimi seems the best option. Another solution where marketing enters into the equation is to promote new products with fish leftovers (Galanakis 2012).

It is important to find alternative uses not only for mature small fish, but also for lesser known sizeable fish species that are not normally part of the human diet. One option is the basket of fish, where fishing associations promote a diversified range of raw fish which includes not only fish that people usually demand, but also other lesser-known species. Raw fish does not need processing other than eviscerating. With the help of new technologies (internet sites, Facebook, mobile applications, etc.), sellers/producers and consumers can easily communicate. Creativity matters in order to avoid waste.

In the case of the fish basket, marketing is vital. An important marketing strategy is to teach consumers how to prepare and, afterwards, to cook the fish species included in the fish basket (Delgado 2017). This has already been done with fruits and vegetables for a long time. The issue in both types of food is their perishability: they are highly perishable and easily become rotten when raw or with soft processing.

It is therefore important to educate consumers to appreciate species according to the most appropriate season (i.e. not during spawning or when the species do not grow) and especially from local waters. With the need for less transport, less energy is wasted. Reducing fish travel time is a way to increase sustainability. Here, the need to develop new preservation methods becomes apparent, mostly focussing on reducing energy consumption, appealing to the consumer, and avoiding wastage of the less wanted fish parts or species.

Creative Marketing for "Old" Seafood Species

Preservation techniques using glass containers/flasks allow the consumer to see the product that is inside the package, which ultimately will influence their purchasing intentions (Chandra Lal et al. 2015).

However, cans might have nice labels and could eventually be sold with a paper wrapping to mimic old times, being sold as "vintage" items. In this way, creative marketing and adequate branding are enough to sell ordinary products (Güven and Yakın 2018). The disadvantage is that what is inside the can is not seen; it can only be trusted that what is inside is acceptable according to the brand's reputation in the market. Brands in such cases are very important (Zeide 2018).

Nice photographs also help to sell products, even when all that is seen is a chunk of hot protein (say, a burger) on a lettuce leaf. It works nicely in the picture, but it does not work in practice, because the heat from the cooked protein cooks the fresh lettuce leaf resulting in an unpleasant mixture. Marketing needs to avoid images that will disappoint the consumer.

Consumers do not like to be cheated. If they think they are buying a neat, square chunk of tasty salmon ready to cook but after unwrapping they also find bones, skin and scales that need to be removed, it will discourage future buys. In Nordic countries, finfish in the wholesale market is presented in a neat manner. It is presented similarly to meat. There is an associated high labour effort to present it this way, but ultimately it adds value to the product and saves the consumer's precious time. Of course, this produces a lot of waste but, if properly planned, the leftovers can be used for producing feed for domestic or farm animals.

Fillets for fish and chips come from a wide range of fish species. The breaded fillet format is eventually more important than the fish species itself. It is a question of how to avoid waste, and how to preserve and afterwards how to present the product.

Discussion

Several seafood organisms that are often caught have no market value. For many reasons, these are generally unwanted. This phenomenon means that there is a market failure for such species. The CFP landing obligation has brought new challenges to seafood with no market value. In addition, there is past experience where it has only been possible to commercialise a species by changing the common name to a more appealing one. Thus, the unsuccessful story of species with no immediate value is not due to marketing reasons, but due to biological reasons. With technological improvements, it has become possible to catch species in deep waters. This process itself is no longer a problem. Neither was it a problem for marketers to change the name of the deep-sea fish species commonly known as the "rattail" to the more appealing designation of "round-nose grenadier". The problem, however, was related to the species' late spawning and sometimes semelparous traits (i.e. reproducing or breeding only once in a lifetime).

The satisfaction of seafood consumers is of fundamental importance. Critical also is seafood sustainability. The difficulty, and consequently the challenge, lies on the management approach where the aim should be to exert the least possible pressure on seafood resources and yet simultaneously satisfy consumers' needs. The question is how to add value to unwanted seafood? One approach can be by developing new methods to preserve and present seafood, particularly those species that have no value when caught, but when processed might see their value increase considerably. There is an urgent need to find new preservation methods and technologies in order to avoid huge wastage of raw materials (seafood). Salting and drying, despite being old methods, can still be very practical and effective with low energy consumption. Usually, they are used with no more than one or two dozen different meats. Thus, in terms of seafood, that figure can potentially be multiplied tenfold.

Factories might develop their manufacturing work and eventually be able to develop preservation methods. Thus, a plant should not be built just to take advantage of, say, a huge amount of boarfish landed, because fisheries are highly erratic. Fishing vessels can go fishing on one day and catch a huge amount of boarfish and yet go out on another day without catching anything. Simultaneously, the plant should not be shut down just because there is a lack of one particular raw material. Eventually, if a huge amount of boarfish is suddenly again caught, assuming there are output channels and the market demands the species, production will be viable again. But what should be done if there is no market at all?

In order to maximise efficiency, a fishing vessel should land not only the target species and other valuable by-catch species, but it should also cope with landing additional less valuable species. The fishing vessel company must profit if landing the whole catch.

Stocking codfish has been done in a combined form of being dried/salted and, more recently, frozen. Stocked cod can then be used creatively as the basis for endless recipes. The Anglo-Saxon “fish and chips” has been used to brand several filleted fish species, sided with French fries and/or peas. The discarded parts of filleted fish may eventually be turned into surimi. Marketing has been very powerful in disseminating surimi as a creative way to take advantage of less well-marketed fish that are used in a huge range of daily meals. Traditional Japanese sushi meals are not only nourishing, but also widespread and have succeeded through powerful marketing, where creative design packaging became appealing and practical. These examples illustrate how creativity can result in a positive impact on the sustainability of marine resources. In such ways, the winners are not only the firms that can make use of high quality and easily available raw materials, but also the consumers who can choose between several competitive brands for the product that best fits their needs, namely a nutritious and ready to consume product.

Conclusions

The promotion of seafood sustainability and the better use of resources must be a priority for mankind. This can be achieved by many methods that are readily available:

- Switching to seasonal and local catches;
- Using marketing strategies to increase demand for previously unknown/unused resources or to increase the worth of low-value species;
- Using technology to reduce wasted resources (e.g. factories producing surimi and fish feed) and to increase knowledge on how to consume previously unused species (e.g. recipes on the internet);
- Maximising/optimising/developing preservation techniques (including ancient methods such as salting/drying, canning, lyophilisation and smoking) to minimise waste and energy dependence during preservation.

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CHAPTER FOUR

A STUDY OF COLOUR PREFERENCES ON PACKAGING CONSIDERING CUSTOMERS' CONNOTATIONS: INSIGHTS FROM IRANIAN SAFFRON

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Introduction

The packaging of a product represents an effective advertising tool that has a critical impact on customers' purchases in today's competitive market. Saffron spice, made from the dried stigma of flowers, is considered the world's most expensive spice and has culinary and medicinal properties (Raja et al. 2012). As Qing et al. (2012) have claimed, packaging plays an important role in the business community and the design of packaging is also an important concern.

Colour, as an element in the packaging design process (Ritnamkam and Sahachaisaeree 2012) and also as a marketing tool, attracts consumers and can shape their perceptions (Labrecque and Milne 2012). Despite various researches on the meaning of colour in different fields of science, design, psychology, and marketing, the context of a product category has been disregarded (Won and Westland 2017).

This research is concerned with colour in packaging designs for saffron, which is "one of the traditional products of Iran" (Gilaninia et al. 2013:1). The question that this study addresses is whether it is appropriate to choose colours for saffron packaging based on customers' connotations about its specifications and attributes as a traditional Iranian spice.

Schnurr (2017) has examined co-creation, which allows customers to contribute to or select the contents of product's offering, and has claimed that customers are able to adapt the colour, labelling, and graphics of the aesthetic features of a product based on their own taste. Following this point, in this study the choice of colours was indirectly conceded to the customers through multiple stages of the interview, questionnaire and conjoint analysis methods. These methods determined the three most affective categories with their dominant connotations. The ultimate result led to more complex colours including yellow-orange, orange-red, black, gold, violet, and lavender based on customers' connotations about saffron.

Literature Review

Packaging

Packaging, in addition to its basic aim of keeping the product safe and making the transportation easy, is considered an effective advertising tool to promote sales (Mohebbi 2014). Several authors have mentioned the importance and role of packaging from various aspects, such as: consumer expectations (van Rompay et al. 2016), consumer buying behaviours (Raheem et al. 2014), consumer purchases (Qing et al. 2012) and purchase decisions (Silayoi and Speece 2004), advertising and presenting the product (Gilaninia et al. 2013; Stanujkic et al. 2015), marketing communication (Cahyorini and Rusfian 2012), and perceptions of quality (Carpenter et al. 2001).

As Becker et al. (2011: 17) declared, "a product's packaging may be a driver of consumer decision making, because it allows consumers to draw inferences about the product, its attributes, or (in the case of foods and beverages) its taste".

The packaging of a good not only attracts and engages the buyer in the purchase stage, but it also influences the consumer's sensory expectations, affects product acceptance after the sale stage, and causes an effect on the buyer's behaviour in the stage of using the product (Rebollar et al. 2012).

Growing competition among producers to attract consumers' attention encourages the need for market differentiation; packaging design is able to communicate product differences visually (Cahyorini and Rusfian 2012). Silayoi and Speece (2004) also believed that the ideal design solution for packaging may be one of the ways to gain a competitive advantage in the market.

Colour in Packaging Design

Ampuero and Vila (2006) pointed to colour, typography, shape, and image as the key graphic variables in packaging design and suggested that packaging designers should be guided to appropriately meet consumers' expectations. Ritnamkam and Sahachaisaeree (2012) analysed four factors of packaging design in their study, including: geometrical shape, colour, shape, and elements and principles. In addition, several studies have shown that layout, shape angularity, and colour usage are packaging features that impact consumer perceptions (van Rompay et al. 2016).

Colours have some characteristics and may influence human emotions or feelings, but the relationship between colour and emotion is complex, and influenced by age, sex, nationality, and cultural background (Gao et al. 2007).

In the visual arts, colour can be the beauty of the form and easily lead to emotional reactions. In packaging design, it captures the consumer's emotions (Qing et al. 2012). Kauppinen-Räisänen (2014: 667) argued that "Colours may communicate because of their innate qualities, shared within the cultural context or subjectively because of personal experiences." In this regard, "Packaging designers are required to take advantage of colors' connotations in designing packaging and combining different colors to attract consumers' attention in making purchase decision" (Mohebbi 2014: 99).

Despite numerous studies on colours and their effects in marketing and packaging (e.g. Gollety and Guichard 2011; Huang and Lu 2015; Kauppinen-Räisänen 2014; Nitse et al. 2004; Rebollar et al. 2012; Schifferstein and Howell 2015; Singh 2006; Valdez and Mehrabian 1994), few articles have represented the characteristics and connotations of colours specifically (i.e. Mohebbi 2014; Kaya and Epps 2004; Sokolova et al. 2015) or colour associations (Garaus and Halkias 2019).

Saffron Packaging

Saffron, also known as the health flower, king of spices, and red gold, is the world's most expensive spice derived from the flower of the Crocus Sativus (Aghdaie et al. 2012). It is interesting to know that "the word Saffron is derived from the Arabic word Za'faran, which translates to yellow" (Abdullaev 2006: 339). Commercial saffron, made from the dried stigmas of the saffron flower, has a distinct and unique colour, flavour, and smell (Ibid).

Saffron is well-known for its application in dyeing industries, medicine, and food industries (Aghdaie et al. 2012). Due to its uniqueness in taste, smell, and colour, as well as its medicinal benefits, it is used in different foodstuffs, like rice, meat, cookies, ice cream, and tea, and in pharmaceutical goods as well (Aghdaie and Roshan 2015). Recent research has shown that saffron, which is traditionally used to colour and flavour, can potentially promote health (Melnyk et al. 2010).

As Mahmoud and Kazem (2012: 7924) claimed, “Iran is the largest producer of saffron in the world”. Saffron is a strategic product mostly produced in the Kerman and Khorasan provinces (Ghorbani 2008).

Although some studies have mentioned the importance of saffron packaging, most of them focused on the export of saffron (e.g. Aghdaie et al. 2012; Aghdaie and Roshan 2015; Gilaninia et al. 2013). The research of Karizaki (2016) indicated that the use of saffron is very common in Iranian foods, sweets, and desserts in most parts of the country. Therefore, the study on the effective factors in saffron packaging design, as a valuable and expensive spice, can lead to an increase in sales in the domestic market.

Methodology

The purpose of this qualitative research is to study the colour preferences of customers in order to select packaging based on their connotations about saffron. In order to derive appropriate colours for saffron packaging, the research intends to follow eight steps:

Step 1: Interview.

Since most of the household responsibilities are assumed by women in Iran (Rafatjah 2012), potential buyers of saffron are females. Accordingly, 50 married females were interviewed as a research sample to identify the connotations of saffron as a traditional Iranian spice. Interviewees ranged from 25 to 55 years of age. They were interviewed in three chain stores in Tehran.

Step 2: Categorising the results of the interview.

The connotations with high frequencies were selected and divided into five categories, including: feelings, social memories, symbols, product’s value, and product’s attributes.

Step 3: Questionnaires.

In this step, to evaluate the categories and the connotations, a five-point Likert scale questionnaire was provided, in which three options with high frequency were selected for each category. Cronbach’s alpha (0.718) confirmed the validation of the questionnaire. After the initial presentation to a pilot group of five people, 60 married females were questioned.

Step 4: Adapting options with colours.

To provide an efficient approach for selecting colours, two options of three categories with high frequencies were adapted with colours. The adaptation was based on a review of common points in documents written by relevant sources.

Step 5: Designing package sample.

As this research is focused on colour, the impact of visual elements like typography and image should be eliminated. In this regard, common appearance features were extracted from existing packages with the same weight (1 gram) to design a simple packaging sample.

Step 6: Generating colour combinations.

Since a conjoint analysis method is used for understanding how consumers trade off product features (Deliza et al. 2003), this research applied the technique. Conjoint analysis generated eight combinations out of two colours for each category.

Step 7: Colouring package samples.

The colour combinations acquired from the conjoint analysis method were transferred to the packaging sample. Eight samples were designed with triple colour combinations.

Step 8: Checking customers' preference.

Eventually, these eight samples were presented to 20 females who were asked to sort the samples according to their connotations about saffron. The ultimate step examined the question: if the selection of packaging colours is done on the basis of customers' connotations, will the packaging be more identifiable in the market?

Results

Preliminary interviews were conducted to identify the connotations of saffron as a traditional Iranian spice. The connotations with high frequencies were classified in five categories: feelings, social memories, symbols, product's value, and product's attributes, as shown in Table 4-1.

Sixty married females (ages in the range of 25 to 57 years, with a mean age of 33.68 years) were questioned with the aim of evaluating the categories and the connotations. Three options with high frequency were selected for five categories. The results of the questionnaire defined the three most affective categories with their dominant connotations by the correlation coefficient (Table 4-2 and Table 4-3).

Table 4-1 Results of Interviews - Connotations of Saffron

Feelings	**Social Memories**	**Symbols**	**Product's Value**	**Product's Attributes**
Joy, Gladness, Happiness, Playfulness, Laughter, Excitement, Vitality.	Iranian Family, Home, Nostalgia, Sociability, Friendship, Celebration, Love.	Saffron flower, Souvenir, Mashhad (second largest city in Iran), Elegance, Grace.	Expensive, Valuable, Luxury, Ceremonial, Formality, Professionalism.	Traditional Foods, Strong flavour, Heat, Energy, Special colour, Unique scent.

Source: Own Elaboration

Table 4-2 Results of Questionnaire – Importance of Categories

Attributes	**Relative Importance (%)**
Product's Attributes	21.23
Product's Value	21.09
Symbols	19.34
Social Memories	19.31
Feelings	19.02

Source: Own Study

Table 4-3 Results of Questionnaire - Most Affective Categories and Connotations

	Attributes	**Options**	**r**
1	Product's Attributes	1.1. Iranian Traditional Foods	0.92
		1.2. Warm Qualities	0.91
2	Product's Value	2.1. Formality and Professionalism	0.90
		2.2. Expensive and Luxurious	0.86
3	Symbols	3.1. Elegance and Grace	0.84
		3.2. Saffron Flower	0.83

Source: Own Study

At this point, six colours should be selected for connotations. Suitable colours with respondents' connotations were selected based on common features of colour emotions, associations, and connotations in different sources (i.e. Garaus and Halkias 2019; Itten 1970; Mohebbi 2014; Morris 2006; Kaya and Epps 2004; Sokolova et al. 2015). For traditional Iranian food, sweets, and desserts, saffron threads are usually soaked in hot water for several minutes prior to use in cuisine, which leads to a yellow-orange colour. So saffron, which itself is a name of a colour, is considered as the colour for the first option.

It is widely believed that saffron has a hot nature. Cold and hot natures (Midzaj) have been believed to exist in Traditional Iranian Medicine (TIM) and the most important piece of work, carried out in the East, was the book "Canon of Medicine", written by Avicenna (Persian physician, 973–1037 AD), who mentioned saffron as a hot natured substance (Shahabi et al. 2008). For this option, the colour of orange-red is chosen. As Itten (1970) described, orange-red is glowing as if filled with inner warmth.

Black, as a classic colour, is associated with formality, professionalism, and power (Mohebbi 2014; Morris 2006; Kaya and Epps 2004). Therefore, this colour is selected in accordance with formality and professionalism as the first option of the product's value.

For expressing expensive and luxurious options, the colour of gold is a proper choice as it is accompanied by concepts such as preciousness and value, as Morris (2006) described.

The colour violet is associated with connotations like elegance and grace (Mohebbi 2014), as the first option of symbolic attributes.

The petals of the saffron flower are a light tone of the colour violet. The colour lavender is considered as the last option.

Table 4-4 Result of Adapting Options with Colours

Attributes	**Options**	**Colour**	**Emotions, Associations and Connotations**
Product's Attributes	Iranian Traditional Foods	Yellow-Orange	Dominant colour of traditional foods
	Warm Qualities	Orange-Red	Hot nature
Product's Value	Formality and Professionalism	Black	Formal, classic, power and professionalism
	Expensive and Luxurious	Gold	Preciousness, value and rich

Symbols	Elegance and Grace	Violet	Elegance and grace
	Saffron Flower	Lavender (floral)	Light tone of violet of the petal part of saffron flower

Source: Own Elaboration

The choice of colour codes and samples was done as follows:

Table 4-5 Colours - Sample and Code

Options	**Name**	**Sample**	**Colour Code**
Iranian Traditional Foods	Saffron		RGB: 244-196-48 CMYK: 0-20-80-4
Warm Qualities	Orange-Red		RGB: 255-104-31 CMYK: 0-59-88-0
Formality and Professionalism	Black		RGB: 0-0-0 CMYK: 0-0-0-100
Expensive and Luxurious	Gold (Metallic)		RGB: 212-175-55 CMYK: 0-17-74-17
Elegance and Grace	Violet		RGB: 143-0-255 CMYK: 44-100-0-0
Saffron Flower	Lavender (Floral)		RGB: 181-126-220 CMYK: 18-43-0-14

Source: Own elaboration based on the reviewed colour literature

The research had need of a packaging sample design to study customers' preferences in colours. For this purpose, the common appearance features of ten existing packages were extracted (Table 4-6).

Table 4-6 Comparing the Appearance Features of Existing Saffron Packages Samples

Samples	**General shape of the package**	**Type of the lines**	**Background**
1	Rectangle	Curve lines	Simple
2	Rectangle	Straight lines	Simple
3	Oval	Curve lines	Simple
4	Rectangle	Curve lines	Simple
5	Rectangle	Curve lines	Patterned
6	Rectangle	Curve lines	Patterned
7	Rectangle	Straight lines	Simple
8	Rectangle	Curve lines	Patterned
9	Rectangle	Curve lines	Simple
10	Rectangle	Curve lines	Patterned

Source: Own Elaboration

The frequencies of each feature were calculated as follows:

Table 4-7 Frequencies of the Appearance Features of Existing Saffron Packages Samples

Features		**Frequency**	**%**
General shape of the package	Rectangle	9	90%
	Oval	1	10%
Type of the lines	Curve lines	8	80%
	Straight lines	2	20%
Background	Simple	6	60%
	Patterned	4	40%

Source: Own Study

At this stage, a simple packaging sample was designed with these features: a rectangle package with curvy lines and no pattern. To generate colour combinations for the sample, a conjoint analysis generated eight combinations out of two colours for each attribute.

Table 4-8 Card ID Generated by Conjoint Analysis System

Card ID	**Product's Attributes**	**Product's Value**	**Symbols**
1	yellow-orange	black	violet
2	yellow-orange	black	lavender
3	yellow-orange	gold	violet
4	yellow-orange	gold	lavender
5	orange-red	gold	violet
6	orange-red	black	lavender
7	orange-red	gold	lavender
8	orange-red	black	violet

Source: Own Elaboration

The colour combinations acquired from the conjoint analysis method were added to the packaging sample and eight samples were designed with triple colour combinations (Figure 4-1).

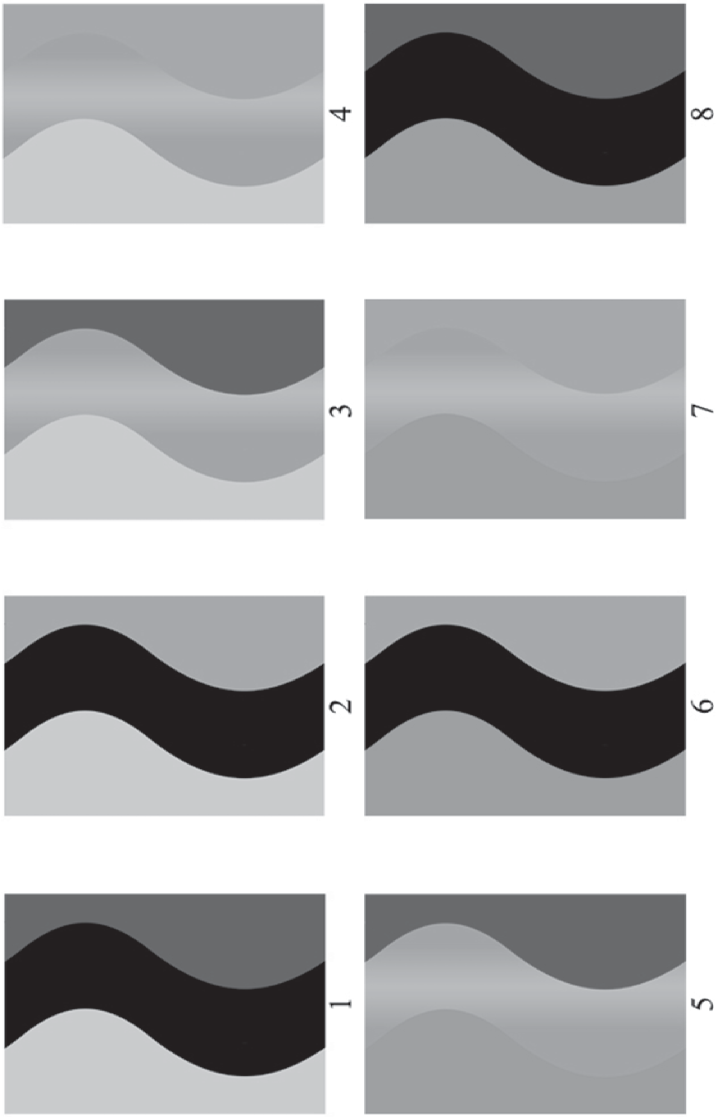

Figure 4-1 Eight Samples with Triple Colour Combinations
Source: Own Study

Eventually, these eight samples were presented to 20 females who were asked to sort samples according to their connotations about saffron. The results (Table 4-9) specified that connotations about the product’s value, with relatively considerable differences, are more important than the product’s attributes and symbols.

Table 4-9 Averaged Importance Score

Product’s Value	47.473
Product’s Attributes	27.648
Symbols	24.879

Source: Own Study

Using the overall statistics (Table 4-10), total utility value for each card was calculated (Table 4-11).

Table 4-10 Overall Statistics

<table>
<tr><th colspan="2">Attributes and Options</th><th>Colour</th><th>Utility Estimate</th><th>Std. Error</th></tr>
<tr><td rowspan="2">Product’s Attributes</td><td>Iranian Traditional Foods</td><td>Yellow-Orange</td><td>-0.250</td><td>0.103</td></tr>
<tr><td>Warm Qualities</td><td>Orange-Red</td><td>0.250</td><td>0.103</td></tr>
<tr><td rowspan="2">Product’s Value</td><td>Formality and Professionalism</td><td>Black</td><td>-1.200</td><td>0.103</td></tr>
<tr><td>Expensive and Luxurious</td><td>Gold</td><td>1.200</td><td>0.103</td></tr>
<tr><td rowspan="2">Symbols</td><td>Elegance and Grace</td><td>Violet</td><td>-0.538</td><td>0.103</td></tr>
<tr><td>Saffron Flower</td><td>Lavender (floral)</td><td>0.538</td><td>0.103</td></tr>
<tr><td colspan="3">(Constant)</td><td>4.500</td><td>0.103</td></tr>
</table>

Source: Own Study

Table 4-11 Total Utility Value

Cards	**Total utility value**
CARD 7	6.488
CARD 4	5.988
CARD 5	5.412
CARD 3	4.912
CARD 6	4.088
CARD 2	3.588
CARD 8	3.012
CARD 1	2.512

Source: Own Study

Eventually, it became clear that a product's value is the most important factor. Customers prefer the colour gold based on expensive and luxurious connotations. Therefore, saffron is known more as an expensive and luxurious spice than as a symbol of professional cooking and official foods.

For a product's attributes, the colour orange-red is superior to yellow-orange, so warm qualities and the hot nature of saffron are a priority for the customers.

In options representing symbols, customers have more powerful connotations for tangible symbols. They prefer the colour lavender as the connotation of the saffron flower than the violet colour, which is associated with the concepts of elegance and grace. It seems that the violet colour for Iranian consumers is not so much associated with the concept of elegance and grace.

For greater clarity, utilities for three attributes are presented in Figures 4-2 and 4-3.

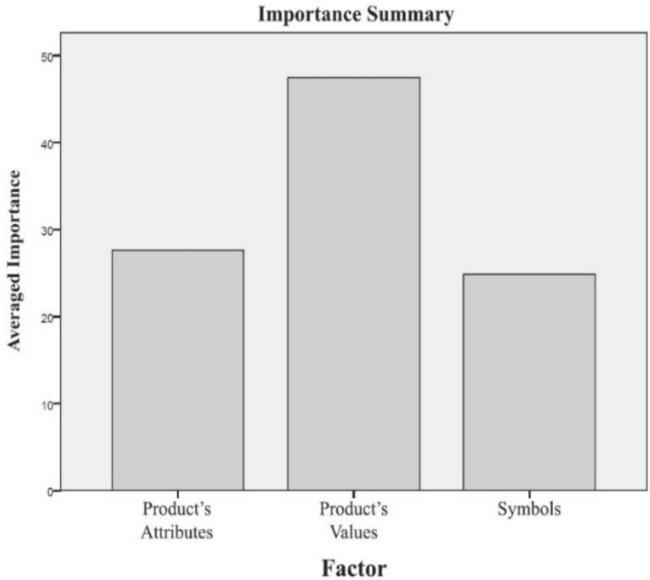

Figure 4-2 Importance Summary
Source: Own Study

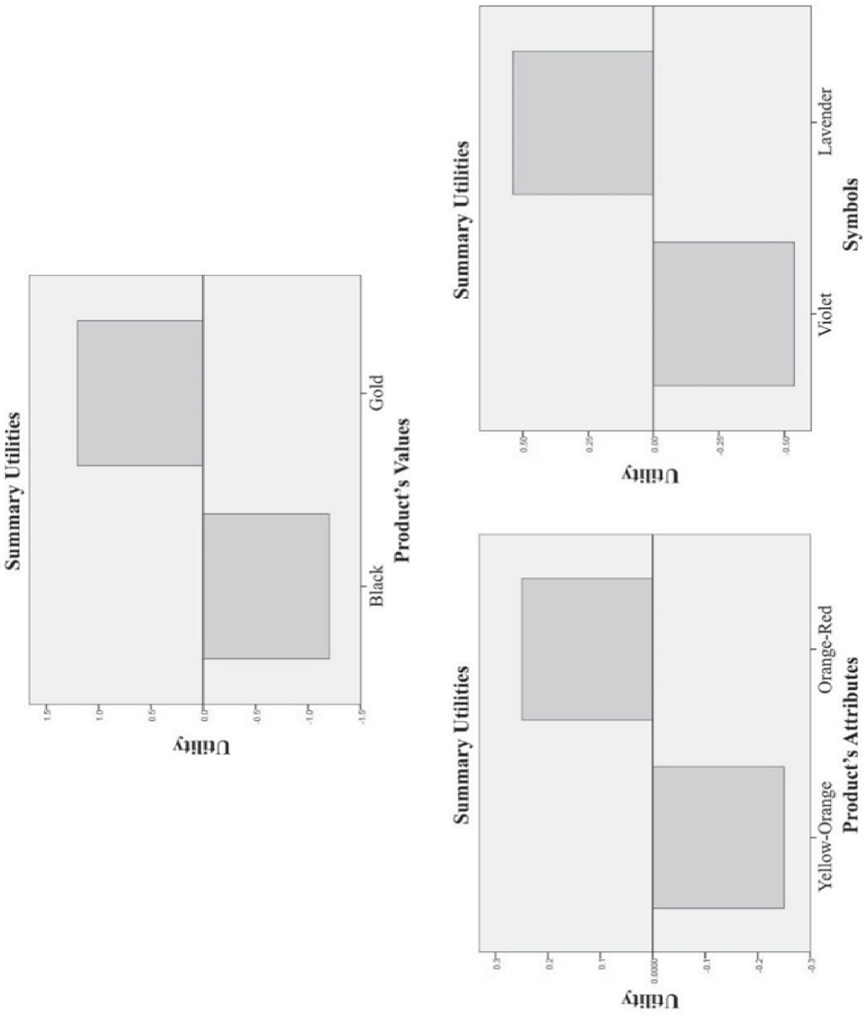

Figure 4- 3 Summary of Utilities
Source: Own Study

Conclusion

While most prior studies have focused on the primary or preset colours, this research attempted to select colours based on the customer's connotations and investigate to what extent colour connotations could match the customers' preferences for the colour of a package. The consumers surveyed in this study regarded saffron as a valuable product with special features. They had preferences for orange-red for the hot nature of saffron, gold to show an expensive and luxurious product, and also the colour lavender as a reminder of the flower of saffron.

Investigating the effects colours have on emotions may be valuable and applicable in packaging design. Such researches can assist designers and also marketers to identify the colours which best convey customers' associations and connotations about a product.

This research considered hue merely as one of the main properties of colour; further studies may focus on other colour appearance specifications like saturation or brightness. Moreover, more research is needed on how people perceive the colours in packaging designs or the relationship between colours and special scents and flavours.

Part III –

Digital Marketing, Interaction Design and Human-Centred Design

CHAPTER FIVE

MARKETING AND DESIGN INTERSECTIONS

VLADISLAV SHVEDCHIKOV,
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Introduction

Marketing and design intersections are essential issues to investigate, both because of their importance in the present market context and because the intersections between these areas can help generate synergies and develop new working solutions. Silk (2006) considers that the fundamental role of marketing is to create value for customers. Thus, companies should define or re-define themselves by the benefits they provide to their customers. As such, firms will be able to capture a portion of the value through the price of their offerings; however, the process of capturing this value should be sustainable. For example, according to Kotler and Keller (2012: 5), marketing is "…about identifying and meeting human and social needs".

The American Marketing Association (2013) offered a similar, but more formal, definition of marketing:
"Marketing is the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large."

In these two definitions, we can see that the scope of marketing is extending beyond the customers' needs and wants into value creation for the community and for society itself. We can also see that design can play a fundamental role in the process of creation, and in communicating that value. Why? Because when they connect (marketing and design) they translate and transform well-designed communication about products and services into value to the customer (Bruce and Daly 2007).

Design allows for the creation of a final product that originates from an idea; however, the idea and the entire creative process should occur before the execution of a service or the development of a product.

Design is a key element that differentiates products and services from each other and allows for the enhancing of individual products and services characteristics and distinctiveness. The role that design plays in concept development, idea implementation, visual representation, branding and packaging, among other areas, is also crucial.

These two areas, when applied together, can create synergies between the idea, the concept and the target market: marketing allows companies to collect information about customers and their behaviour, helping to define segments and positioning, for example, while design relies on marketing input for its future application.

Marketing and Design Intersections

The major activities of marketing are focused on identifying and meeting social needs, finding market patterns to help improve company performance and gain more market share, brand awareness, and customer loyalty. Bloch (2011) suggests that over the last decade, design research has remained at an early stage compared to research on the relevance of consumer behaviour and branding, and that this discrepancy exists because marketing academics are still *outsiders* in relation to areas such as aesthetics and engineering, although they connect to design.

In this regard, Krohn (2015) emphasises that design adds value to the brand and helps to build long-term potential, linking all functions of the company (Figure 5-1) by adding emotional value and meaningful symbolism. Design can also provide support to marketing communications.

Kotler and Keller (2012: 476) define marketing communications as “the means by which firms attempt to inform, persuade and remind their customers—directly and indirectly—of products and brands they sell”.

During the process of preparing new products and services for the market, all promotion channels and elements of communication should be integrated, as mentioned by Silk (2006). After establishing the value/benefit for the customer, this benefit has to be communicated. This is an important task, which a marketer should accomplish and perform with regard to the communication model of the marketing for a product/service. Another aspect the marketer should consider is the role that every communication campaign or tool can play in the overall integrated communication strategy.

Figure 5-1 Marketing and Design Intersections
Source: Own Elaboration

The concept of holistic marketing, in this regard, is one of the significant elements for any company communication (internal or external). Kotler and Keller (2012: 18) define this holistic approach as follows: “A holistic marketing concept is based on the development, design and implementation of marketing programs, processes and activities that recognise the breadth and interdependencies. Holistic marketing recognises that 'everything matters' with marketing and that a broad, integrated perspective is necessary to attain the best solution."

However, the concept of holistic marketing can be divided into four main areas (Kotler and Keller 2012):

- Relationship marketing;
- Integrated marketing;
- Internal marketing;
- Socially responsible marketing.

According to Kotler and Keller (2012), the holistic marketing concept includes all elements of "The Marketing Mix 7 Ps" (product, price, place, promotion, physical evidence, process, and people), "The Marketing Mix 4 Cs" (clients, costs, convenience, and communication) and "The Web Marketing Mix 4 Ss" (strategy, site, synergy, and system). As Bloch (2011) notes, there is yet much research to be done regarding design and marketing intersections, since marketing has been focused more on technical issues. One example can be drawn from the *STP* (Segmentation, Targeting, Positioning) process, since design can be applied to the positioning elements in order to help create unique and memorable recognition of products, services and visual aspects — to aid the communication of product characteristics (e.g. package, visual aspect, form of product), but also to increase brand and product awareness.

In effect, design contributes to aesthetically *pleasing* product appearances, but it can also be used to transform products and services, consequently helping firms acquire consumer satisfaction and loyalty (Beverland, Gemser and Karpen 2017).

The design of a product is noticed by customers because it conveys important information. It can also contribute to customers' symbolic perceptions of products or services and can aid customers in using objects as a method of self-expression (Bloch 2011) or as a way to express their identity (Gruen 2017).

Symbolic forms and letterforms can be the expression of an epoch, a place, an identity or a feeling (Mena 2015). However, semiotic meaning applies not only to the sign but to the typography as well. The form of a letter, like a symbol, contains codified visual information about its context and conveys characteristics before reading (Van Leeuwen 2005). Therefore, semiotics has been the means by which human beings have communicated ideas and experiences throughout time and space. As a visual code, the alphabet has undergone modifications over time in pursuit of an optimal way to convey the messages people want to transmit. As a result, visual codes suggest the need to conduct minor changes over the years and epochs, to adapt to the new requirements, and to be more useful and practical to customers.

Design and Marketing Touchpoints

Design helps to convert a marketing concept or idea into a desired product or service function and can help to define product functions, optimise costs and consequently satisfy customers. The early design decisions in project planning can define long-term success, since they take into consideration the whole life cycle needs of a product/service (Hyder 2010). Another positive outcome of design was presented by Kotler and Rath (1990: 16): "Good design differentiates companies and makes products *stand out from the crowd*."

This statement shows the importance of design in different segments and explains the first steps that are necessary for shifting from one segment to another and gaining a foothold in the desired target-segment. In addition, Boztepe (2007) suggests that utilitarian value is transmitted through functional usefulness, which is evaluated by the capacity to respond to the task completed. The hedonic element in the product experience reflects the aesthetic appeal of the product to one or more senses, reflecting the visual aesthetic and semiotics, which relate to the meaning or sign value of a product design (Van Rompay et al. 2009). On the other hand, pragmatic design is reliable, safe, and convenient to use, and as such a utilitarian value would be enriched with economic efficiency, quality and ergonomics. Best (2011: 12) mentions:

> Many global companies and global economies have gone through a shift from manufacturing and mass-production of tangible products to the production and supply of increasingly intangible services […] this shift is reflected in design, moving debates beyond "design as style and aesthetics", to design of the process, design of the experience, design as a catalyst for innovation, and design as an enabler of cultural and creative change.

Design process is focused on user-centric and user-driven content that involves customers in the process of product/service creation and enriches their experience. Desmet and Hekkert (2007) state that usability is a crucial concept in user-centred design, one in which the quality of the users' relation or interaction with the offering is a key component. Design approach to product offerings requires intuitiveness and ease of use, while inappropriate usability causes problems in meeting the functionality (Norman 2002). To respond to this challenge, Best (2011: 12) highlights how different geographical regions are noticing the influence of design:

> The Nordic Region of Sweden, Norway, Finland, Denmark and Iceland, for example, sees the creative industries as a great asset and opportunity area: "The greatest assets of any region are its people, their individual creativity, skill and talent… The creative industries create wealth and jobs through developing and exploiting intellectual property."

These creative industries use, for example, design thinking, which is described by Brown (2008: 2) as a

> discipline that uses the designer's sensibility and methods to match people's needs with what is technologically feasible and what a viable business strategy can convert into customer value and market opportunity.

Design thinking can contribute to implementing strategies and to successful problem solving through visual communication, by presenting possible solutions and ideas to clarify issues that are hard to define. Implementation of the design thinking and visualisation methods in companies results in better strategies, in understanding hidden problems and in staying focused on the result, without neglecting the need to have a usability and functional approach to the product/service. The design-thinking method shifts the focus from the structure of the company to the customer and helps to understand better the customers' needs and provides a chance to find and adopt new products or services faster as a result of real requirements. The data retrieved from customers and the information about customers generated by marketing (see Figure 5-2) function as strategic points and as inputs to the design workflow.

As Whyte, Bessant, Neely and Yaghi (2005: 2) noted in their definition of creative process management, design can help firms in several ways:

- Design for aesthetic appeal—styling, image, fashion status—for example, the iPod;
- Design for function—for example, aircraft engines, Dyson cleaners;
- Design for manufacturability—creatively thinking about how the product can be effectively and efficiently made;
- Design for sustainability—for example, for re-use, recyclability, etc.;
- Design for reliability and quality in use.

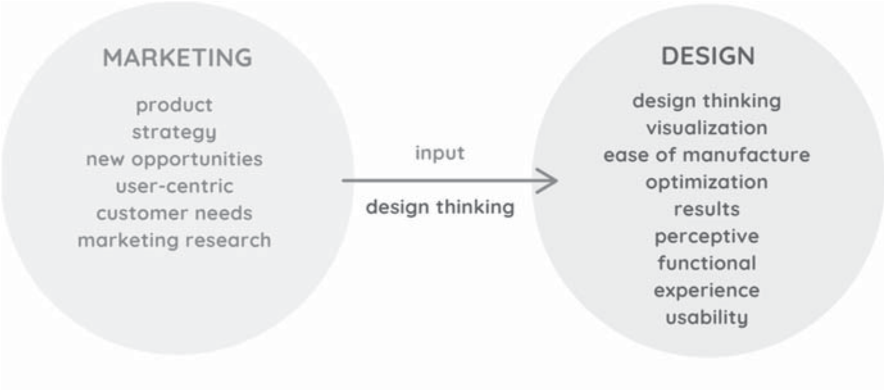

Figure 5-2 Design Thinking Approach
Source: Own Collaboration

The design concept uses marketing input variables received from empirical research and information about customers that allow for converting a concept or idea into designed parts and standard components that assemble and work together to provide the desired product purpose. New products presented to meet customers' needs can be improved since design can amplify marketing, and vice-versa. In addition, innovative representation of product benefits can increase popularity and gain market share.

According to Krohn (2015: 32): "A consistent language of color and shapes at all touchpoints, which creates a unique style and makes the brand and its products unique."

All these parts must be connected ideologically, systematically and visually. Design helps to define both price and the visual communication of the firm, product, service, or brand. Design provides the following benefits (according to DTI 2005):

- Enhances product and service quality;
- Differentiates products and services;
- Markets products and services and enhances company image;
- Lowers production and/or maintenance costs;
- Adds to the creativity, intellectual property and competence of the company.

Starting from the marketing perspective, the main touchpoints between these two areas determine the future of a product's life cycle and communication with the customers. In this sense, the most important marketing inputs that support design projects are a) input data on customers, b) knowledge of customers and behaviour, c) segmentation, targeting, positioning, and d) offer of value proposition. On the other hand, from the design perspective, we can find a) concept development, b) idea implementation, c) visual communication, d) brand, packaging and packaging interior, e) aesthetics, and f) creation of a product that meets customer necessities.

Figure 5-3 Marketing and Design Touchpoints
Source: Own Collaboration

Kotler and Keller (2012) highlighted in the past how the “7 Ps” intersect and can represent touchpoints between design and marketing:

Product: design can enhance the value of the products and improve the usability and customers’ experiences during the usage and consumption of products and services, but also, during product planning and development.

Place: the selection of the location for the business depends on the marketing research, which provides information about the customers' behaviour and interests. In addition, place can contribute to increasing and enhancing the experience stage, which is the place where the service occurs, and customers satisfy their needs and wants to create personal memories.

Price: the constant and continuous examination of product or service prices allows verification of its suitability to the market needs, depending on the product life cycle. Therefore, this variable can change, since it depends on production costs and market demand. Design can contribute to cost reduction for products, since the process of product/service creation can include some elements that can be optimised using a design approach.

Promotion: needs appealing communication, which can be improved with the assistance of design in order to generate and create more appealing visual communication campaigns.

Physical Evidence: relies on the physical environment, which can be improved with service design and product design to create a richer customer experience within the experiential stage and settings.

Processes: addresses the question of whether there are elements of the design process that could be better managed or even optimised with the integration of design. For example, how is the customer's engagement during the experience measured? Can it be improved?

To answer these questions, many different disciplines, such as design, must be considered because during the service experience, expectations can come into conflict with reality, and bad experiences should be avoided.

The cognitive dissonance theory argues that individuals seek mental comfort and avoid situations that may cause mental discomfort (Festinger 1957). Should such a situation occur, individuals may seek information or situations that may reduce their mental discomfort and reinforce or even change their previous beliefs, ideas and values. *Processes are an important* aspect to monitor because during the service experience, customers will be able to confirm or disconfirm their expectations.

People: working with customers requires personalisation, since experiences should be individual, distinctive, unique and memorable. In marketing nowadays, mass customisation is an important element because it leads to the creation of unique experiences for customers and raises brand awareness. For example, Gilmore and Pine (1997: 92) establish the existence of four faces of customisation:

> …collaborative (designers working closely with customers); adaptive (where standard products are changed by customers during use); cosmetic (where packaging of standard products is unique for each customer); and transparent (where products are modified to specific individual needs).

Lampel and Mintzberg (1996) suggested a continuum of various mass customisation strategies, including different configurations of processes (from standard to customised), products (from commodities to unique) and transaction processes (from generic to personalised). This process (Figure 5-4) integrates discipline, marketing and design. Marketing helps to define customers' needs, and design helps to create the desired products/service encounters.

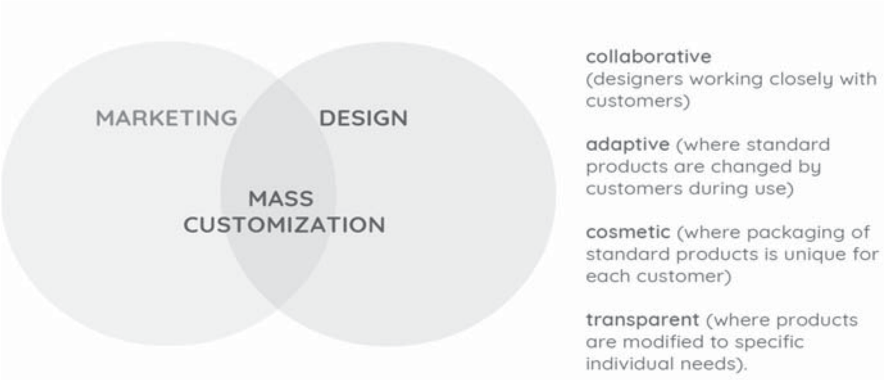

Figure 5-4 Mass Customisation Touchpoints
Source: Own Elaboration

Implications

Today, as in the past, marketing plays an important role in helping designers by providing them with the information and knowledge needed for design implementation in products and services. Moreover, a design approach is vital for the use and efficiency of products and services. Design also enables companies to reach new market segments or even to switch between segments. For experiences and events, such as conferences, the holistic approach improves when design is used for creating memorable experiences. Nevertheless, in mass customisation, design can be the connection between firms' products and customers' identity and self-image.

In this regard, all elements of the communication strategy, including the smallest, are essential for developing visual communication, in which design is central for creating holistic marketing tactics.

On the other hand, design's role in supporting a firm's strategy and marketing planning has also been the focus of continuing attention, due to new methodologies like the design thinking method. Design thinking methodology allows companies to reduce costs, raise brand awareness and improve other important variables of marketing.

Overall, these two disciplines can support and complement one another and increase a firm's performance.

Chapter Six

From Digital Marketing to Marketing Automation: Practices and Answers of the Portuguese Hotel Sector

Pedro M. Cascada, Marisol B. Correia, Nelson de Matos, Carlos M.R. Sousa, Célia M.Q. Ramos

Introduction

Nowadays companies operate in highly complex changing environments that lead the decision-making process to be more complicated among managers and stakeholders, since they have to consider bigger and bigger quantities of information and at the same time meet a higher demand for quicker responses. The performance of decision-makers in a global economy remains a challenge full of opportunities and hazards in terms of both getting access to the market and also when operating in the market, in the acquisition and selling of goods and services.

In addition, the increase of competition in a globalised society, with constant technological changes, and in which new needs and demands of the consumers emerge, calls for a permanent effort of product, service and experience(s) innovation and adaptation. Information communication technologies (ICT) have, in this regard, an essential role, as they provide support to the companies in their decision-making processes, thus facilitating the company efficiency. Moreover, ICT helps the management of the organisational processes, creating new business opportunities and guaranteeing the necessary flexibility of adaptation to the present conditions of competitiveness and entrepreneurial cohesion.

One sector in which the ICT role is evident is in the digital world, mostly among the digital platforms hospitality companies use. Today, more than ever, the future of tourism, and particularly hospitality, is influenced by demand and their response to digital progress and digital dynamics. Consumers are sharing more openly their experience before, during and after the consumption of the service and/or product (Fine, Gironda, and Petrescu 2017). The consumers' experience is extended beyond the traditional spatio-time limitations because the digital age enables consumers' content to be shared, commented or liked, creating new opportunities for electronic word-of-mouth (eWOM) and influencing the demand and offer side (Cheng et al. 2018; Moran, Muzellec, and Nolan 2014).

However, the proliferation of more and more social and communication platforms brings the focus of marketers in the services and hospitality industry, in general, into the problem of reaching consumers and acting and managing on-time their feedback and product and service offers. Thus, the purpose of the present study was to reply to a set of questions that have no answer or are only partly answered in the published investigation:

a) Describe the current situation of Portuguese hotels regarding the use of digital marketing in a double perspective; one in relation to the tools used by hospitality managers and another related to the digital marketing strategies carried out by companies.
b) Verify if there is a conscious, structured and systematised use of the tools and strategies of digital marketing by the hotel companies with regards to research and creation and communication of information.

Thus, this study addresses the role of digital marketing in the marketing strategy at the tactical and operational levels of the hospitality industry. This study's business perspective allows managers in this sector to gain a better understanding of the use of digital marketing tools and their advantages and disadvantages, of the level of investment required, of the strategies involved, and of the sources of information. In addition, the study will identify used tools in the digital setting and the degree of relevance of the tools used for the successful implementation of digital marketing strategies. Lastly, the production of content on social platforms where the hotels have a presence and the degree of satisfaction with the return on investments and with the use of marketing automation platforms will also be addressed.

This knowledge will allow hotels to identify potential gaps and opportunities in the marketing sector. It will also provide prospective researchers and academics with new insights, based on the study developed, for potential future research. Finally, it is hoped that the study will contribute to the development of a reliable knowledge base, from which companies can equate strategies, plans and actions regarding the advantages, impacts and returns of the use of digital marketing tools in their activities. The structure of the article is composed of four sections in addition to the present introduction. The literature review is presented in the second section, followed by the methodology used. Subsequently, the analysis of the results is discussed and presented, including the limitations and the possible future work.

Literature Review

The response of consumers to the different media sources and their content (Batra and Keller 2016), along with the increase in new forms of marketing (Muzellec and O'Raghallaigh 2018), has shifted the path of purchase and what information is searched for (Cheng et al. 2018). Despite attempts by some authors (e.g. Šerić, Saura, and Praničević 2016) to find customers′ perceptions regarding the hospitality digital marketing practices, it remains unclear to what extent hotel managers use and rely on digital marketing communication strategies and marketing automation to boost their customer interaction and involvement and increase sales and profitability.

The customer interaction calls for hospitality managers to consider Lemon and Verhoef's (2016) claim that the customer experience journey has become more personal and complex at the different time-space stages (online and offline) of the experience. Thus, one of the goals for any hospitality marketer is not only the critical task of understanding the reasons and motivations behind customers' interactions, but also which tools and processes can be used to transform the digital marketing to be more successful with the implementation of automation technologies, adding value throughout the customer journey and diverse customer-company interactions. In this regard, for the hospitality industry, in general, the response to the increasing number of existing mobile platforms was the adoption of an omni-channel approach, and also the implementation of automation tools to face the constant demand from consumers for both more technology and human based resources (Rodriguez-Sanchez, Martinez-Romo, Borromeo, and Hernandez Tamames 2013).

In addition, the digital marketing practices and strategies require a more personal approach from the hospitality managers, since experiences are personal. In this sense, attention moved to the creation of more personal narratives (Lee and Gretzel 2012) and user experiences (UX) that mentally engaged consumers (Pine and Gilmore 1998) during the online journey. It is important for the experiences to be relevant (Greene 2011; Kim and Ritchie 2014) and interesting, since a key element in the success of any experience is the active role customers should play (Duerden, Ward, and Freeman 2015) as co-creators and not co-producers (Vargo and Lusch 2015) of the experience of which individual and dynamic narratives are built (Campos et al. 2015; Grönroos and Voima 2012; Prebensen and Foss 2011).

In this process the connections and relationships made between customers and other digital elements of companies (e.g. websites, social networks, blogs) impact on the degree to which they will be able to share their experience and immerse in it (Duerden, Ward, and Freeman 2015; Ekman 1992). Moreover, the intangible, perishable, heterogeneous and inseparable features of services and, therefore, experiences, mean customers are purchasing a set of intangible events or services via the digital context.

The process behind the digital service is crucial, consequently requiring a high level of choreography so that every digital encounter (Bertella 2013; Prebensen and Foss 2011), every moment of the experience in each and every online platform, becomes an active element in engaging customers (Cohen, Prayag, and Moital 2014), in awakening sensations (Morgan, Lugosi, and Ritchie 2010), and in releasing emotions (Basoc 2015; Kwortnik and Ross 2007) that may contribute to a context in which the consumer's web emotions are stirred (Page and Mapstone 2010). However, as the authors argued, consumers' emotional responses to digital media are scarce. In the same sense, the increasing number of marketing platforms and tools in the digital environment encompass several challenges for hospitality managers, since each platform has its own advantages and disadvantages and each provides unique UX, awaking specific emotions and outcomes (e.g. wide exposure, brand awareness).

In this regard, it is argued that, as a first step, it is crucial, before increasing the digital marketing investment in technological and human resources and promotion activities, to understand and identify the digital marketing practices of decision-makers. Portugal, a mature hospitality industry market with several world awards in this industry (e.g. Travel and Hospitality Awards 2019), was chosen as a case study for a benchmark regarding digital marketing practices to help each hospitality manager find the right tools and strategies to improve company performance and competitiveness.

Methodology

Data Collection

This study was conducted in 2017 and includes hotels in all regions in Portugal (mainland and islands). There were 1,135 hospitality units registered in Portugal with three, four and five stars. An online survey was sent to those hospitality units in January-February 2017 and the sample obtained is composed of 75 units.

The survey was divided into three parts; the first one is necessary to collect the characteristics of the hospitality unit and of the survey respondent, the second part to collect information about the usage of digital marketing tools by the hospitality unit and, finally, the third part to get information about the marketing automation platforms used.

The Figure 6-1 presents the characterisation of the sample, where it is possible to see that the majority are hotels, representing 80.0% of the sample, 8.0% are holiday villages, 6.7% are tourist apartments and 5.3% are apartment hotels.

Regarding the management model, the sample has 64.0% national independent hotels, 1.3% foreign independent hotels, 21.3% belonging to a national hotel chain and 12.0% belonging to a foreign hotel chain. Regarding stars rating, 29.3% are 3-star units, 53.3% are 4-star and 17.3% are 5-star units. About working staff, the majority (52.0%) have between 10 and 50 employees, 20.0% have less than 10, 21.3% have between 51 and 250, and only 6.7% have more than 250 employees. Finally, related to billing, only 2.7% have an invoice lower than €50,000, 8.0% present an invoice between €50,001 and €150,000, 18.7% have an invoice between €150,001 and €500,000, 26.7% between €500,001 and €1,500,000, only 9.3% between €1,500,001 and €3,000,000, and finally 26.7% bill more than €3,000,000.

Regarding survey respondents, the majority (33.3%) are director/marketing manager, 17.3% are director/sales/commercial manager, 12.0% belong to the marketing department, 10.7% are general directors and 10.7% belong to the commercial department, 5.3% work in reception and only 2.7% belong to the financial department. Concerning the respondent's qualification, 65.3% have higher education (Bachelor, Graduate), 26.7% have a postgraduate training (specialisation, master's or PhD) and only 8.0% have secondary education (10^{th}-12^{th} grade). In conclusion, all survey respondents have more than a basic qualification. Finally, the majority of respondents (40.0%) are between 36 and 45 years old, followed by 33.3% of respondents between 26 and 35 years old, 9.3% between 18 and 25 years old and 9.3%

as well between 46 and 55 years. Finally, only 8.0% of respondents are more than 55 years old.

Figure 6-1 Sample Characterization Summary
Source: Own Elaboration

Data Analysis and Results

The collected data were analysed with descriptive statistics to evidence the status of the tools used and practices developed by hotels.

As shown in Figure 6-2, in all categories (three, four and five stars), hotels have an annual marketing budget of 1%-5% of the global budget.

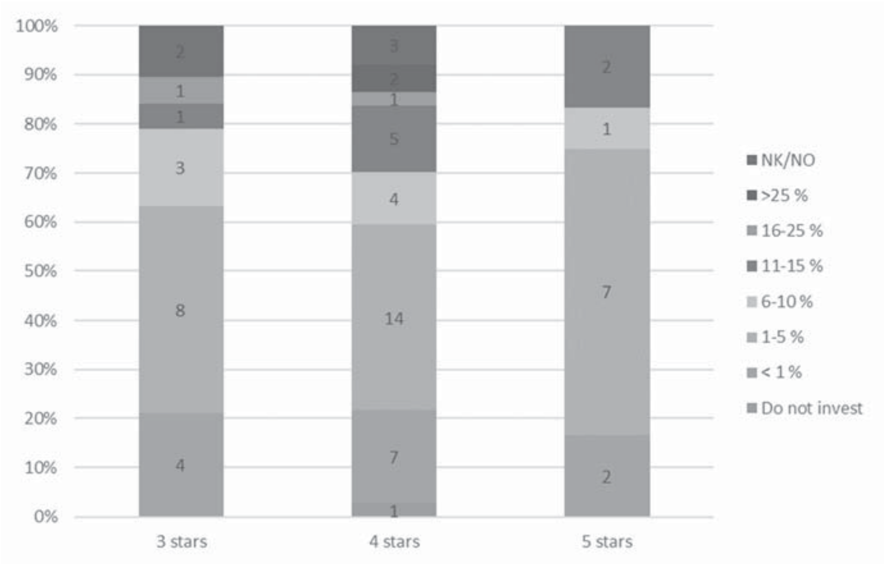

Figure 6-2 Annual Budget Invested in Marketing by Number of Stars
Source: Own Elaboration

According to Figure 6-3, of the more than 91% of companies that use digital marketing, 36% invest in digital marketing, with a budget between 1% and 5% of the annual marketing budget, and only 7.81% invest more than 25%. However, more than 50% of hotels reported that they would increase the budget dedicated to digital marketing.

Figure 6-3 Use Digital Marketing (left) and Digital Marketing Budget (right)
Source: Own Elaboration

As can be seen in Figure 6-4, all hotel units that responded to the question regarding digital marketing strategies indicated the increase in direct reservations/bookings as a goal to be achieved, followed by the brand awareness that corresponds to 66.2% and the increase in visits to the website with 60.6%. On the other hand, only 25.4% indicated an increase in the number of contacts for email marketing lists (lead generation).

Having in mind the results by stars, it is possible to verify in Figure 6-4 that 4-star and 5-star hotels have similar results in all objectives and 3-star hotels have less focus on increasing the number of contents and awareness/branding.

It should be noted that the majority (56.3%) of the hotels answered that the strategies and actions of digital marketing are developed internally, while 14.1% use external services (outsourcing) and 29.6% use both.

Regarding the volume of online sales, the majority (54.7%) indicated that the percentage of online sales volume through partners (for example OTAs) is over 30%, and 60% of the hotels indicated that sales made on the website correspond to 10% or less of the total sales volume.

Concerning the definition of tools to help define the markets/segments to achieve, the main ones are Google Analytics with 67.5%, Facebook Insights with 55.3%, Google Trends with 44.9% and Google Keyword Tool with 44.2%.

With regards to the definition of the most important keywords for the digital marketing of the hotels, 77.9% indicated the empirical knowledge of the business, followed by Google Analytics with 58.7% and the internal database of the hotels with 54.7%.

Regarding the relevance of tools for the implementation of the digital marketing strategy, 59.7% consider the website as very relevant, followed by social platforms (e.g. Facebook, LinkedIn, Twitter, Net-T) with 53.2%.

In relation to frequency of the website audit, 24.1% of the units indicated that they are subject to an audit/SEO report on a quarterly basis and 17.2% indicated that they never performed the audit.

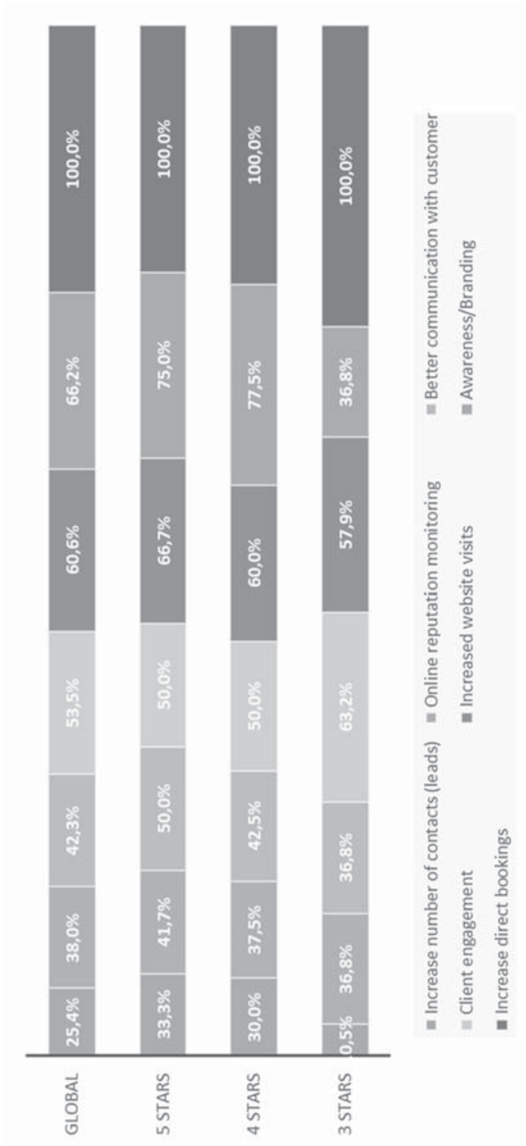

Figure 6-4 Objectives to be Achieved with Digital Marketing Strategies
Source: Own Elaboration

Figure 6-5 shows how often new content is created for the different platforms, as well as the percentage of hotels that use these platforms.

Figure 6-5 Creation of New Contents
Source: Own Elaboration

As can be seen in Figure 6-6, 98.7% of the hotels are present on Facebook, followed by 66.7% on Instagram. It is noteworthy that only 6.7% have a presence on Blogger or have a blog.

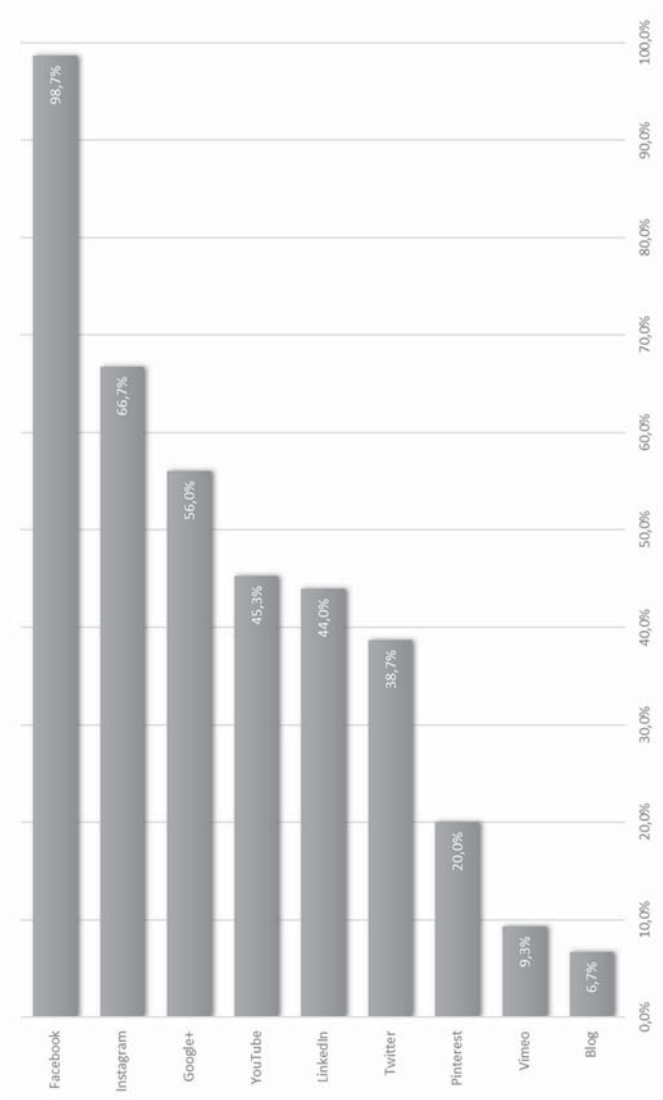

Figure 6-6 Platforms Used
Source: Own Elaboration

Relating the degree of satisfaction with the return obtained through the social media, 61.9% of the 3-star hotels, 50% of the 4-star units and 76.9% of the 5-star units are satisfied.

Regarding paid advertising, as seen in Figure 6-7, 78.6% of the hotels indicated that they use Facebook as a paid advertising platform, followed by Adwords Display/Search with 53.6% and Instagram with 35.7%.

Regarding the use of automation marketing platforms, only 6.9% of the units indicated that they used these types of platforms, indicating the platforms Mailchimp and Hootsuite.

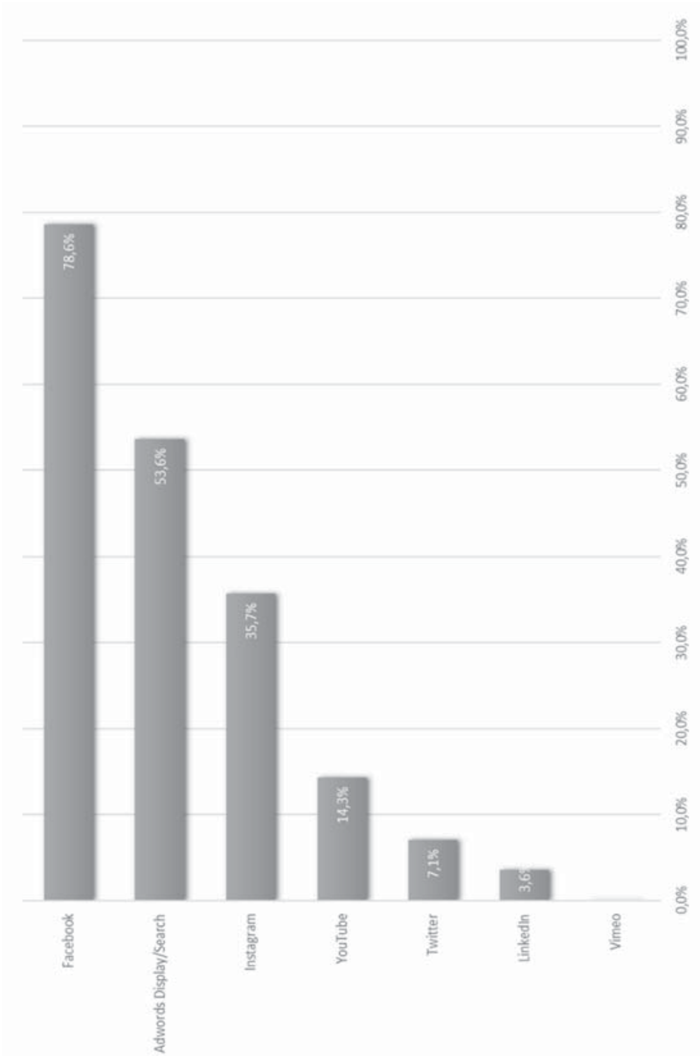

Figure 6-7 Paid Advertising Platforms Used
Source: Own Elaboration

Figure 6-8 presents the indicators that the hotel units use to monitor (measure) the business objectives. As can be seen, the number of bookings and volume of sales are the most used indicators.

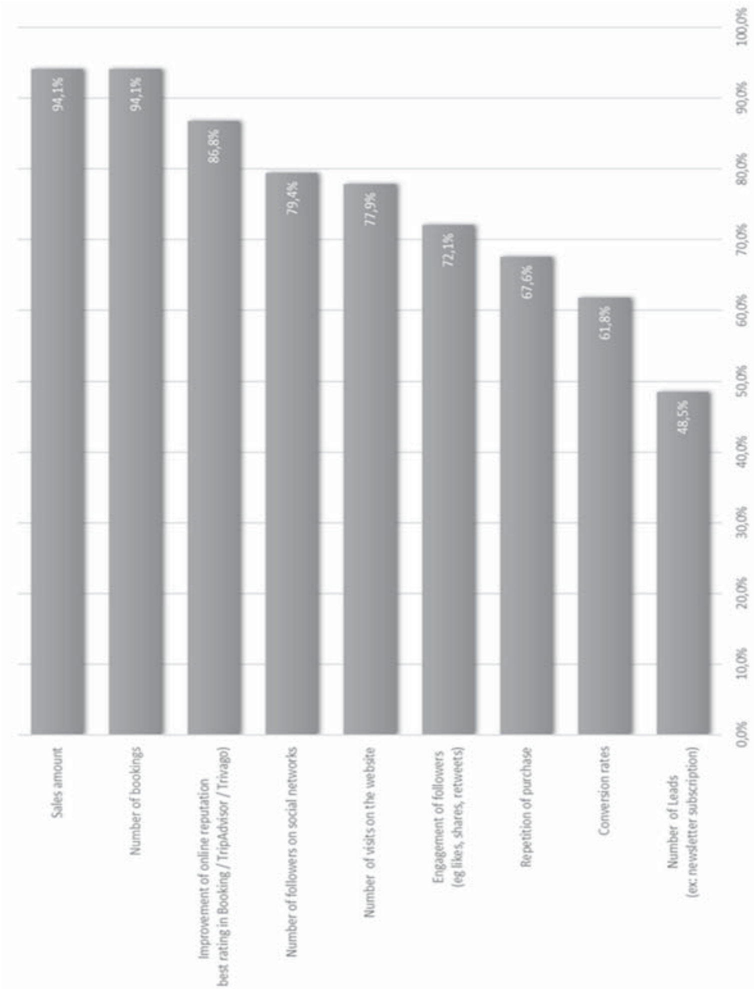

Figure 6-8 Indicators Used to Monitor Business Objectives
Source: Own Elaboration

Discussion and Conclusions

After analysing all the results, it is possible to verify that the goal most considered by 4- and 5-star hotels is an increase in direct bookings, followed by brand awareness. Findings also showed that client engagement in the case of 3-star hotels achieves a higher relevance than the previous objectives. Marketing objectives are mostly achieved with the video production perspective, since this type of content has the highest percentage.

In terms of platforms used to communicate with customers, Facebook has the highest percentage, followed by Instagram. Facebook is also the paid advertising platform most regarded by hoteliers.

With regard to the indicators for measuring the success rate of digital marketing strategies, the sales volume and the number of reservations (both have the same percentage) are highlighted. Moreover, hoteliers also measure their success on online reputation based on ratings like those of Tripadvisor and Booking.com as well as the number of followers on their social networks.

Taking into consideration the results, Facebook is one of the most relevant platforms for hoteliers since it allows them to communicate with customers and potential customers while also providing the opportunity to analyse the evolution of online interaction and measure the effectiveness of the marketing strategies in the digital environment.

In a market environment filled with innumerable digital platforms, and in which new messages reinforcing product and brand values (Aaker 1996; Brakus, Schmitt, and Zarantonello 2009) are a constant reality, neglecting to some degree the importance of the consumers' experiences (Holbrook and Hirschman 1982; Morgan, Elbe, and Curiel 2009; Morgan, Lugosi, and Ritchie 2010) in hospitality during the UX consumption (Benyon 2019) can lead to failure. The market reality has changed regarding its dynamics, leading to digital market fragmentation and increasing pressure towards brands (Brakus, Schmitt, and Zarantonello 2009; Gertner 2011; Pike 2009; Qu, Kim, and Im 2011) and hospitality managers.

Overall, marketing literature (Ali, Hussain, and Ragavan 2014; Manhas and Ramjit 2013) challenges marketers and managers to set a stage for consumers to be engaged *by* and involved *with* the event; digital platforms are an example, enabling customers to assume a *passive* or *active* role while experiencing the event (i.e. as users) in order to generate greater satisfaction (Assaker, Vinzi, and O'Connor 2011; Liljander and Strandvik 1997; Manhas and Ramjit 2013; Valle et al. 2006). The present study was able to describe the current situation of Portuguese hotels regarding the use of digital marketing, where their focus was on increasing their sales by using direct marketing throughout the digital platforms. Although their goal is important for the success of the company, it seems to demonstrate that they concentrate excessively on the short-term and lack a long-term vision. In effect, it was found that hotel companies present, in general, a structured and systematised use of the tools and strategies of digital marketing to reach their target markets. However, their overall success and performance is yet to mature, since their investment in this area is not massive and can be increased.

Our findings showed hotels rely on Facebook and Instagram, with paid and organic marketing campaigns, to increase brand awareness among their target markets. This approach demonstrates the importance of these two platforms and their success in achieving the hoteliers' goals (increase in sales). However, there are opportunities among other digital platforms, such as Twitter, to reach niche markets or to build higher brand awareness. Moreover, since hotel managers measure the success rate of digital marketing strategies through sales volumes and the number of reservations, it would be essential, nevertheless, to consider other elements, such as the UX and how much the online customer's experience can become rich or even memorable (Duerden, Ward, and Freeman 2015), permitting users to be immersed in it.

In the same sense, hoteliers assess their online reputation with the help of Tripadvisor and Booking.com ratings and according to the number of followers on social networks. This strategy is positive but lacks the most important element that hoteliers must consider: their customers' experience and, ultimately, satisfaction. The ratings of hospitality platforms and number of followers are important metrics to measure online reputation, but they are only the output of the customers' experience and their UX during digital engagement throughout the various platforms. Hoteliers need to remember they are focusing on the result (i.e. output) and not what may cause or lead the output to improve or deteriorate. Thus, they must consider finding other metrics and another approach, one based on experiential marketing.

Like the majority, this study has some limitations that present new opportunities for research development. In fact, having worked with a sample of 75 hotels, a broader sample and the contrast against other realities will be necessary and should be considered. In addition, it is necessary that digital practices, like products and services, can be identified and differentiated from their competitors. The relationship between the academic world and industry, as verified in this investigation, focused on the offer side and with the subjective empiricism of managers' decisions, neglecting to some extent the consumers. Therefore, future studies should explore how engaging and memorable the online experience can be when using and sharing content on digital platforms.

Like other studies, the present study also has limitations due to constraints regarding the design or methodology which impacts this research. The reduced sample size did not permit identifying significant/representative results, thus restricting the generalisation to the population. In addition, the lack of other research studies concerning this topic also limited comparisons. Another limitation was the data collection method (online survey) which reduces the propensity of hoteliers and their digital managers to respond to the survey. For future research, in order to obtain data from different sources, scholars should consider professional associations that represent the sector or direct inquiries.

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Part IV –

Research Methodologies Developments in Design Management and Marketing

CHAPTER SEVEN

DESIGN THINKING: A PATH TOWARDS DESIGNERLY WAY OF PLACE BRANDING

HOMAYOUN GOLESTANEH, MANUELA GUERREIRO, PATRÍCIA PINTO

Introduction

Place Branding (PB) is a comprehensive term comprising nation, region, city, and destination branding, with an emphasis on the exclusive characteristics of a specific location, which delivers its image to create differentiation and raise competitiveness when compared to other places. Indeed, PB is a stage in the evolution of the collective identity of a group of people who live in a place next to one another.

However, the multiplicity of constructs, contexts, and stakeholders involved in PB have made it a complex process (Ashworth, Kavaratzis, and Warnaby 2015; Braun, Kavaratzis, and Zenker 2013; Giovanardi 2012; Kavaratzis and Dennis 2018; Ren and Blichfeldt 2011). As a result, research in the field has focused on developing holistic, interdisciplinary, and participatory approaches to increase the effectiveness of the PB process (Hankinson 2015), which in turn necessitates the development of new methods and frameworks to unravel complex issues associated with the process.

Due to its dynamic and multidisciplinary nature, and its flexibility in close interaction with other disciplines, research on PB has made significant progress. One of the disciplines to recently attract the attention of several researchers is Design Thinking (DT). In recent decades, we have observed the rise of DT as a strategy for innovation (Brown and Wyatt 2010; Liedtka 2011), a competitive advantage (Martin 2009), and a process for problem-solving (Dorst 2011; Liedtka 2014). Essentially, DT is a set of principles and methodologies aimed at generating innovative ideas and solving complex problems. It is also a discipline of visualising and prototyping through iterative processes that promotes learning from failures and embracing risks that may lead to better solutions to problems (Kolko 2015). The main argument developed in this study is that PB requires an inclusive, human-centred, iterative, and innovative framework to simplify its process without causing any changes in its constructs or focusing only on a specific topic or stakeholder. The purpose of this study is to provide a clear description of how DT can simplify the branding process, while increasing stakeholders' participation at different stages of branding. This study examines the effectiveness of developed strategies before implementation and providing a platform for brand communications and experience.

To start, this study highlights the current understanding of PB and DT through a concise literature review. This analysis is followed by an examination of the common ground between the two disciplines. The study then provides an account of how to apply DT as a methodological framework for developing an inclusive and simple PB process. The conclusion drawn is that PB can benefit from a human-centred, creative, iterative, practical, and inclusive approach to find the best ideas and ultimate solutions to simplify its process. This means that PB processes can be simplified and more inclusive through principles of DT.

Place Branding

Despite its remarkable advances and popularity among scholars and practitioners, PB still faces several limitations and challenges. A lack of conceptualisation and theoretical shortcomings in the field of PB has been pointed out by several scholars (Anholt 2005; Gertner 2007; Lucarelli and Berg 2011; Skinner 2008).

The effectiveness of PB has been challenged by Medway et al. (2015), as its practices have started to become duplicated and, in some cases, mimicked (Bell 2016). Kavaratzis (2012) also stressed that limiting the whole process of PB to designing and developing communication and promotional tools based on visual strategies is arguably one of the misconceptions that have misled contemporary PB practice. According to the author, this has led to the sameness of places in their physical form and their communications efforts, where the promotional materials are either too generic to convey any meaning to stakeholders or too similar to reveal any differentiation. In addition, the chaotic conception of PB – which lacks a traditional theory (Go and Govers 2010) – and the absence of a common language (Kavaratzis 2009) are considered significant gaps in the PB process. Other shortcomings include the number of PB practices that have proven to be restrictive and uncomprehensive (Ashworth and Kavaratzis 2009), the difficulty in measuring effectiveness (Go and Govers 2013; Zenker and Martin 2011), an exaggerated focus on exogenous investment and tourism development (Kavaratzis 2012), and a tendency to apply quick-fix solutions (Lucarelli and Giovanardi 2016).

There are several items that can be identified as current issues with PB. However, it seems that the main issue is the complexity of its process. As argued by Kavaratzis (2012), PB is inherently a complex and dynamic phenomenon that should be seen as an interactive, evolutionary (Hanna and Rowley 2011), fluid and open process (Kavaratzis and Hatch 2013).

In this sense, PB needs to be considered as evolutionary, not only in the sense that it is continuous, but in the sense that it is open to changes and reformulations along the way (Jernsand and Kraff 2015). Therefore, PB needs more collaboration among stakeholders (Cerda-Bertomeu and Sarabia-Sanchez 2016) to bring together and negotiate the interests of the various interdependent social actors (Lichrou, O'Malley, and Patterson 2010). Place branding also needs to be inclusive of all community members (Eshuis and Edwards 2013) and of the local community's habitus and sense of place (Campelo 2015). Place branding needs to be considered as part of a broader strategic planning process (Oliveiria 2015) and must lead place development and economic development policy, instead of following it (Govers 2011). Hence, there is a need to understand the complexity of PB, capitalising on the understandings and experience of its stakeholders, and articulating the knowledge into an inclusive PB conceptualisation (Rebelo, Mehmood, and Marsden 2020).

One can draw from these findings that PB requires a new framework to simplify the complexity of its process while maintaining the overall integrity of PB as a strategic plan, enabling stakeholders' participation throughout the process. Such a framework should include prototyping and evaluating different scenarios to address the multifaceted problems of place development and simplify the branding process without causing any changes in its constructs or focusing only on a specific topic (e.g. tourism or economic development). It should also be inclusive and human-centred, iterative, and innovative. In the simplest terms, there is a need to rethink the PB process through DT. However, first, we need to know what DT is and how it works.

Design Thinking

Design thinking is a multifaceted concept that comes in many different shapes and forms (Kleinsmann, Valkenburg, and Sluijs 2017). It can be considered as a process of solving problems and issues practically and creatively to improve future outcomes. In this regard, it is a kind of solution-based thinking which instead of solving a preconceived problem, starts with a goal (a favourable future situation) in order to discover hidden parameters and alternate optimised paths to the goal. Since DT is an iterative process, each solution can also be a potential new starting point for future phases. Cross (1982) asserted that this type of thinking most often occurs in a built or artificial environment. In this process, current and future conditions, problem parameters, and possible solutions may be considered simultaneously. This approach differs from the scientific method, which begins with the definition of all the parameters of the problem in order to create a solution.

Design thinking involves inductive, deductive, and abductive reasoning (Dorst 2011). Therefore, DT combines the generation of new ideas by analysing them and evaluating how they can be applied generally (Dunne and Martin 2006). It is driven by intelligence that embraces innovation and it gives any organisation the freedom to explore multiple ways to solve problems and discover the option that best delivers competitive advantage (Clark and Smith 2008). Design thinking is often perceived as an open-ended creative process that results in numerous possible ideas (Chen and Venkatesh 2013).

Design thinking is meant to encompass everything good about designerly practices (Kimbell 2011). It is, of course, not a new concept or practice. It has been prevalent since the beginning of design. The concept of DT is now taking hold in management and is paving the way for design to address new organisational problems (Cooper, Junginger, and Lockwood 2009). However, the new use of the concept offers other fields of research and practice, such as innovation and marketing, the opportunity to apply design tools to solve the problems of businesses, services, and processes (Tschimmel 2012).

Design thinking provides managers with a new way to think of new products, services, systems, and ways of designing them. This method involves the ability to discover problems quickly, define concepts, develop human-centred scenarios, and design business strategies. In this new way, managers are able to see how design methods and principles can help them navigate the uncertainties and complexities they face. Moving beyond its traditional role, design is establishing itself as a tool with which to address a wide range of issues, from strategy to social change (Cooper et al. 2009). Moreover, DT is no longer just a cognitive process or a mindset, but has become a useful philosophy for any management process, connecting the creative and inclusive approaches to traditional business thinking, which is usually based on planning and rational problem-solving. The current focus of DT is on innovation and business transformations that begin with people. This involves the discovery of unmet needs and opportunities, as well as the creation of new visions and alternative scenarios that can reorient an organisation around the people it serves. It is part of the *fuzzy front end* (Koen et al. 2001) of idea generation and is also being adopted to solve *wicked problems* (Rittel and Webber 1973).

Another fundamental characteristic of DT is its human-centred approach, which expresses itself in the collaborative and participatory methods of co-creation (Tschimmel 2012). According to Brown (2009), human-centred design-thinking is supposed to convert wicked or ill-structured problems into opportunities through pursuing non-linear, iterative processes, with its phases ranging from inspiration, to ideation, to implementation. Wickedness refers to difficulties in solving these problems because of incomplete, changing, or contradictory requirements or due to complex interdependencies, and to when the effort to solve one aspect reveals or produces further problems (Buchanan 1992). Nevertheless, DT claims to create solutions to these problems through rational thought, calculations, creative insight, or a combination of these (Cross 2011; Küpers 2016; Lawson 2006).

Design thinking addresses the fundamental assumptions, values, norms, and beliefs that make an organisation what it is (Cooper et al. 2009). Design thinking is an essential tool for simplifying and humanising. It cannot be an extra; it needs to be a core competence (Kolko 2015). Managers and management scholars are particularly attracted to the concept of DT as the recent environmental, financial, and socio-political crises have forced them to look for new strategies to survive within the competitive landscape (Liedtka 2004). However, despite the current popularity of DT in management, marketing, and other business-related fields, its impact on branding (and particularly PB) has rarely been explored.

The process of PB, therefore, is open to debate, as is the potential application of DT in such a process. Design thinking can be helpful for various stages of the branding process, from its strategic definition to the experiences that it may provide. Design thinking can provide a great platform of engagement for place-brand stakeholders and enhance their participation in all stages of the process. Nevertheless, given the lack of consensus on the nature and process of branding and the potential impact of DT on such a process, the question arises as to how DT can help solve existing branding problems. To answer this question, we first need to identify common ground between the two concepts.

A Common Ground

Design thinking can complement the conventional process of PB. Despite the differences between the two disciplines in terms of approaches, methods, and procedures, they have several things in common. However, the main objective of this study is to identify the common areas that can lead to their synergy and, most importantly, help to simplify the process of PB.

The most common point of similarity between DT and PB is their multidisciplinary nature. Design thinking is a creative process (Brown 2008; Kimbell 2011; Steen 2013) with the core idea that any discipline can take inspiration and learn from the way designers think and work. Thus, design thinking can be applied not only in innovation efforts but also in strategy and management (Brown 2009; Martin 2011). PB is also inherently multidisciplinary (Gertner 2011; Hankinson 2010; Medway and Warnaby 2014) as it covers various fields of research and practice, such as business and economics, geography and environmental science, marketing and management, planning and place development, tourism and hospitality, and urban studies (Lucarelli and Berg 2011).

Another noteworthy likeness is that both disciplines pay special attention to strategic planning. Place branding is a strategic process that relies on the effective extension of the core brand through relationships with its stakeholders (Vuorinen and Vos 2013). Pasquinelli (2014) described PB as a collective strategy-making process, which implies a high level of engagement from local stakeholders. Govers and Go (2009) have also argued that it is necessary to approach PB strategies from a holistic perspective, going beyond an analysis that only refers to marketing, branding, and communication. Hence, a place-brand strategic plan should be based on a clearly defined and shared vision, which is firmly rooted in the existing policies, resources, capabilities, motivations, and perceptions of the place (Iversen and Hem 2008). On the other hand, DT can contribute to strategic planning by applying immersion, analysis, ideation, prototyping, and implementation. This process makes it possible to understand the context, analyse it, generate and test ideas and then observe their impact before implementation. It can also help to align the organisations' major goals with the needs and expectations of their stakeholders. Organisations would then be able to motivate and stimulate the commitment of all stakeholders involved in the execution of the strategy as well as generate interactions among them. And ultimately, it would be possible to achieve a structured result that has a higher chance of being effective.

Stakeholder involvement in the process is another common thread between the two disciplines. As stakeholder engagement is a major paradigm in almost every strategic process, both DT and PB are ultimately geared to engage more stakeholders, trying to solve their problems, and making them satisfied. One of the foundations of PB is that the process itself should focus on identifying the needs and interests of stakeholders (Martin and Capelli 2018; Sarabia-Sanchez and Cerda-Bertomeu 2017). This concept is operationalised by the stakeholder-orientation and stakeholder engagement construct (management) that embraces the processes whereby stakeholders are identified, their interests surfaced, and interactions managed (Hanna and Rowley 2011, 2012). For Hankinson (2004), it is stakeholder-orientations that form the basis of the whole process. He describes PB as a set of relationships with stakeholder groups that spread the core of the place brand.

A similar foundation also exists in DT, which is called empathy. Empathy involves being aware of, and sensitive to, the expectations and needs of stakeholders and vicariously experiencing their feelings. Design thinking can broaden the narrow perspective of PB, which usually focuses only on a small group of internal or external stakeholders. The characterisation of DT as a "human-centered approach to problem-solving" (Brown 2008: 86), makes it become clear that the process should not just be all about customer-orientation or a specific group of stakeholders, but that the emphasis should be on the broader notion of human-centricity. The integration of this aspect of DT into the process of PB would strengthen its cross-functional definition and enhance its multidisciplinary nature. Another item that links DT and PB is the concept of participation. Theoretical developments in both disciplines are evolving towards concepts of stakeholder participation, co-creation, and co-design (Aitken and Campelo 2011; Huybrechts, Benesch, and Geib 2017; Jernsand and Kraff 2015; Kavaratzis 2012; Scott, Bakker, and Quist 2012). A participatory and dynamic approach to PB (Kavaratzis 2012; Kavaratzis and Hatch 2013) indicates that place-brands are networks of stakeholders (Hankinson 2004, 2007, 2015) and that the process of PB happens through a series of interactions among them (Hereźniak and Florek 2018). As noted by Braun et al. (2013), there are two concepts developed within the participatory approach that are particularly relevant to PB. The first is the concept of brand co-creation (Hatch and Schultz 2010), which stresses the fact that brands are not formed through traditional communications, but are co-created by a multitude of stakeholders who encounter and appropriate them.

The second concept calls for greater involvement of stakeholders in branding, which posits the need to empower the relevant stakeholders and allow them to participate freely in creating the brand. Zenker and Erfgen (2014) outlined a model of the participatory PB process that includes three stages of analysis, structure, and monitoring. The first stage involves capturing key components and measuring associations of the place, and then, defining a shared vision for the place. In the second stage, a structure for stakeholders' involvement should be implemented and guidelines for the participation process must be developed. The third stage involves implementing and monitoring the projects that are considered relevant. There are several examples of PB processes with a participatory approach, each using different tools, techniques, or frameworks depending on the geographical context and the challenges they faced. However, among them are few studies that have mentioned DT in the branding process (see Jernsand and Kraff 2015; Löfgren 2014; Muratovski 2012).

In design discipline, however, participation is often an integrated part of both design research and practice. It is applied under a diversity of headlines including participatory design, co-design, co-creation, and DT. As participatory design continues to engage—not only with the public sphere, but also with everyday life—and as researchers engage stakeholders in experimental practices of innovation through a long-term involvement in technology design and social innovation (Binder et al. 2011; Bjögvinsson, Ehn, and Hillgren 2012), the core values and ideals of participatory design are taking on new meanings and forms (Smith, Bossen, and Kanstrup 2017). Participatory approaches and concepts continue to be developed and critically researched across an extensive range of application domains (Halskov and Hansen 2015).

The ongoing, ever-wider diffusion of the participatory approach brings with it opportunities and challenges that call for the development of new perspectives on the values, characteristics, politics, and future forms of DT and PB. Nevertheless, the main question is how to use these new perspectives? Or in simpler terms, how can DT be applied to simplify the PB process? In the next section, we will try to answer this question by providing a conceptual model for the PB process that has been developed based on the DT methodology.

The Design Thinking-Based Place Branding

Unlike critical thinking, DT is a process that is linked to creating an improved future and seeks to build ideas up. In such a process, problems and possible solutions are explored, developed, and evaluated simultaneously in an iterative manner (Cross 2006, 2011; Dorst and Cross 2001; Kolko 2010; Lawson 2006). Design thinking models proscribe a research structure that is a logical system of methodological and technical procedures. This structure allows for obtaining credible data on researchable phenomena, which can then be processed and used in practice.

A wide range of process models and frameworks are offered in DT research and practice, from the simple but efficient “Double Diamond” design process model launched by the British Design Council in 2004, to the more complex five-stage models developed by IDEO and the Hasso Plattner Institute of Design at Stanford University. The Double Diamond model is a well-illustrated and comprehensive representation of such a process involving four stages of Discovery, Defining, Development, and Delivery in two adjunct modes of divergent and convergent thinking. In this vein, we propose a framework based on the Double Diamond model for the PB process (Figure 7-1).

As shown in Figure 7-1, the proposed model is composed of four stages for designing and developing a PB process. The first stage, the Discovery phase, includes the steps in which the challenges and problems associated with the place-brand are identified. A successful place-brand not only contributes to the economic development and prosperity of the place, but can also bring harmony in the beliefs, visions, culture, and behaviour of residents and visitors. The impact of a successful place-brand on the infrastructure, image, and reputation of the place has also been mentioned by numerous scholars. Therefore, at this stage, all the assets, attributes, and associations of the place that may influence the place brand should be identified and later examined. Another important step is identifying place-brand stakeholders. The significance of stakeholders has been noted in many previous studies. Therefore, our emphasis in this study is that place-brand stakeholders, and especially internal stakeholders (e.g. public, private, and volunteer stakeholders), should be identified, have their interests examined, and have their relationships managed throughout the branding process; a process that Hanna and Rowley (2011: 465) referred to as “stakeholder engagement (management)”.

The second stage, as its name implies, identifies all factors, components, and foundations that might affect the brand structure and place-brand strategy. In this stage, the brand approach and its architecture are defined and an attempt is made to reach a consensus among stakeholders regarding place-brand identity and a shared vision for the future of the place. At this stage, it is also necessary to pay attention to other components of the branding process, such as brand infrastructure and how to provide a “supportive structure” (Zenker and Erfgen 2014: 229) to increase stakeholder participation.

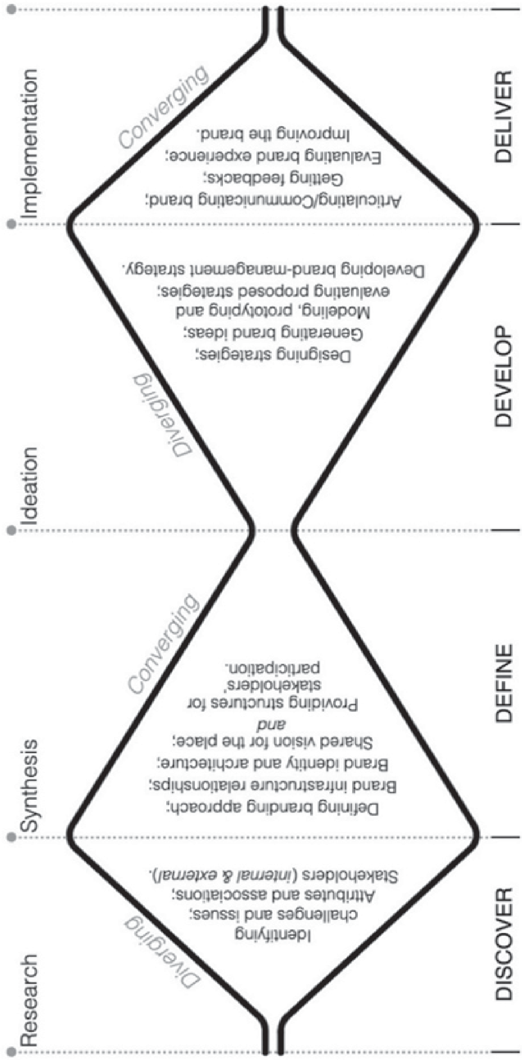

Figure 7-1 Double Diamond Model of Place Branding Process
Source: Own Elaboration

Traditionally, the Development phase is one of the most important stages in PB. Based on the defined place-brand vision in the previous step and stakeholders' interests, different PB (and marketing) strategies are developed in this stage. Goal setting is of particular importance in this process. Therefore, different ideas are proposed by stakeholders and efforts are made to achieve feasible strategies in a participatory process. Following this process, selected ideas are simulated, and their effectiveness will be evaluated before implementation in the real world. These simulations range from very simple or computer-based prototyping to implementing strategies in pilot environments. Once the tested ideas have been approved, they can be used to formulate an overall strategy for PB and developing a brand-management framework.

The final stage, the Delivery phase, consists of five important steps. Special attention is often paid to this stage as almost all the tangible and intangible aspects of the brand will be experienced by stakeholders through this stage. The first step is to articulate the brand by focusing on the processes associated with the brand expression through its verbal and visual identity. Articulation is the means of representing brand identity by considering brand architecture, and it is an essential element in the PB process (Hanna and Rowley 2011). Articulating the identity and meaning of a place-brand requires coherent and focused communications. Therefore, brand communications, which are built on and closely associated with brand articulation, are considered as another component of the branding process that has a direct impact on stakeholders' perceptions and experiences of the place-brand. The model of the dynamics of place brand (Kavaratzis and Hatch 2013) illustrated the relationship between brand articulation and communication to represent place identity in the PB process. However, only meaningful stakeholders' participation can strengthen the brand communications, provide an effective and sustainable place-brand, and prevent the development of "artificial" place-brands (Braun et al. 2013: 18).

While the importance of communication and its influence on brand perceptions is clear, there is a need to consider the overall experience of stakeholders as a vital component and a success factor in the branding process. Indeed, brand experience plays a key role in the development of the place-brand and increasing the awareness of its stakeholders. This can be pursued through the direct experience of stakeholders with various components of the place-brand, such as brand infrastructure and informal communications (e.g. word-of-mouth) with stakeholders who share their experiences.

Ultimately, brand evaluation is important to assess the brand experience and other place-brand components and sub-processes that contribute to the stakeholders' experience. Brand evaluation is very important because it helps to gather feedback about the overall image and experience of stakeholders with the place-brand. Moreover, it has the potential to not only inform future marketing and branding strategies, but also to inform developments in other components like brand infrastructure, stakeholder engagement, and place-brand identity. Nevertheless, in order to improve the experience and image of the place-brand, there is a need to monitor stakeholders' satisfaction with the brand and to ensure that the place-brand components meet and exceed their expectations.

Conclusion

This study is primarily motivated by an interest in exploring the contribution DT–as a mindset or set of strategies and tools–can make to the PB process. A preliminary research investigation through a concise literature review revealed that despite the numerous outlined fundamental similarities, there are many areas where both disciplines can profit from one another, not the least due to their long-standing tradition of research and application.

Suggestions are made on how DT can provide place-brand developers, managers, and decision-makers with a framework for addressing the complex challenges of PB and developing an inclusive yet simple branding process that also benefits from the active participation and full support of stakeholders. Design thinking can help to make PB processes more creative and flexible by helping to accelerate the learning processes in place-brand management. Design thinking can also help PB avoid the pitfall of developing fictitious and artificial place-brands.

The findings of this study revealed that PB could benefit from a human-centred, creative, iterative, practical, and inclusive approach to find the best ideas and ultimate solutions to simplify its processes. This means that PB processes can be simplified and made more inclusive through the principles of DT.

As a result, a conceptual model for PB is developed based on the DT process. The model is built on the principles of DT and consists of four main stages: Discovery, Defining, Development, and Delivery. Each stage of the model involves several different steps that, in four consecutive divergent and convergent processes, range from initial research and synthesis of findings, to developing ideas and strategies, to implementing and evaluating them.

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CHAPTER EIGHT

A PROPOSAL FOR AN ADAPTIVE METHOD FOR THE MARKETING OF NEW PRODUCTS IN SME'S: AN APPROACH BASED ON DESIGN

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Introduction

In 2008, 24 out of the 25 countries ranked in terms of highest competitiveness had the best performance in design (Sorvali and Nieminen 2008). Likewise, it has been shown (CEC 2009) how mature companies that have developed design activities beyond physical appearance in the product presentation are five times more likely to develop innovative products compared to those that do not focus on design.

The same situation has happened to small and medium-sized enterprises – SMEs. Several studies show that design-based SMEs can become a source of support when introducing products to the market (i.e. innovation in addition to generating newness in products and services (Brazier 2004; OECD 2005; Acklin 2010)).

In this way, design practices within firms not only allow general features of goods and services to be increased (e.g. functionality, aesthetics, ergonomics, accessibility, usability, safety, sustainability, cost, or intangibles such as brand, communication and culture) (Borja de Mozota 2006; Borja de Mozota and Kim 2009; Acklin 2010), but also allow for the configuration of other types of functions in the organisation, such as marketing.

Kotler and Armstrong (2012) define marketing as "the process by which companies create value for their customers and establish solid relationships with them to obtain their value in return" (Kotler and Armstrong 2012: 5). However, the success of introducing new products in the market (termed as product innovation) is established according to how the product newness will be accepted into the market based on the perspective of the company/user relationship.

This study presents two objectives. The first is to encourage links between management, design and innovation, supported by the marketing decision-making processes. The second is to visualise and locate the practice of design within organisations through its integration into the marketing phases.

With this purpose, the Aúne Method was developed. The method allows both external and internal firm variables to be interpreted.

This chapter is divided into four sections. The first part is the literature review. Because qualitative strategies were used to gather information, the literature review included concepts and constructs for supporting the first draft of the proposed model. The proposed methodology is the result of iterations of an initial descriptive draft model. The final proposal emerged from these iterations based on experimental practices, which included new concepts or constructs. The main conceptual streams to support the model included a review of the main contributions regarding capabilities, the resource-based view, the marketing phases and the competitiveness factors of the companies. In the second part of this study, the methodology and use of the participatory design are explained, including a basic definition of the design tools used during the co-design process. In the third section, the method is presented as a final product derived from the entire previous process. The article ends with some conclusions, which look at the results and reflect on the importance of design in promoting product innovation in marketing.

Literature Review

Design, Marketing, and Management

Design has been associated with both the exploration stages and the conceptual development in the front-end of new product development.

In this initial context, the design is the act of generating ideas that seek coherent proposals of what is being created or about how to create something that does not yet exist (Walsh 1996), or at least not in the particular foreseen way.

The act of designing requires a combination of logical and intuitive thinking and it is based on visual, emotional, social, economic, cultural, and aesthetic aspects, among others (Krippendorff 2005). Because design is a phenomenon that addresses society and culture, it can be incorporated not only in the stages of product development but also in markets, social dynamics, everyday life, technology and consumption, among others. And although the design practice has been oriented towards product development within companies, the act of designing can enable other functions within them. Thus, design in these perspectives is the process resulting from transforming ideas into opportunities and then into realities.

In practice, it is necessary to manage these processes. In this way, acquiring design practices and skills to enable a company to achieve a good performance is what is called design management (Gorb and Dumas 1987). Design management is useful when new projects develop from the conception of ideas and development up to the introduction of goods or services, or the application of new ideas, markets, brands or business models. These last ideas help companies to understand that design is part of a business strategy that goes beyond the activities aimed at the development of a product. Therefore, it is important to emphasise that design management helps both to identify opportunities and support projects that require long-term thinking. In this way, when design management focuses on generating integrated strategies for marketing, the main goal is to promote innovations that have a positive benefit for an organisation's value chain (Hsu 2012).

Alignment, Decision and Strategy

Design tools deployed through practice can be a guide in the construction of sustainable advantages for companies. These tools could strategically align marketing and new product development; for example, facilitating the new product's introduction through product design and user needs. In the same way, these tools could align organisational internal knowledge with user needs' knowledge, the technological opportunities and the language of the products and services (Utterback et al. 2006). In the context of this article, a strategy is conceived as the direction and scope of a long-term organisation, which through a set of decisions achieves advantages through the configuration of its capabilities; in this way, on the one hand, firms meet demand needs and stakeholders' expectations (Johnson, Scholes, and Wittington 2006), and on the other hand, the marketing strategy based on design helps to provide, through creative tools, possibilities that have meaning and value for the company, customers and suppliers, among other actors, in order to strengthen the coherent alignment between business and strategy. Thus, marketing strategy works as a bridge between the resources and the results of an organisation. Design practices help to achieve a broad and systematic vision of decision-making for the organisation. Such decisions are generated to identify and solve creative problems optimally, starting with variables such as current internal information, available time and existing limitations (Simon 1957), and variables that can alter the level of complexity of decision-making such as the dynamic environment (Mitchell, Shepherd, and Sharfman 2011).

The concept of decision used in this article is the descriptive one. This perspective shows how decisions are taken in reality (Hansson 1994). From this perspective, the adaptability of the decisions to the capabilities within the organisation, including culture, is relevant. Adaptability makes reference to the values, beliefs and assumptions that are part of every organisation – that is, the way members do things together, even if they are not aware of it (Schein 2010). In this way, knowing the business's real activities facilitates change processes in the organisation (Kok and Biemans 2009) and reorients the company's innovative activity; that is, it reduces the uncertainty of the product introduction processes in the market (OECD 2005).

In this way, knowing the factors that intervene in companies' decision-making during the product introduction stage becomes a priority since "the reason for market research is the taking [of] accurate and assertive decisions (...) insofar as they contribute [to] reducing uncertainty and support organizations to achieve their objectives" (Benassini 2009: 23).

Marketing Process

An analysis of market needs is essential to ensure that products have the desired performance and additionally to increase competitive advantage in companies. To take this into account, two different phases must be addressed: the market research phase, which is oriented towards the collection of information on the size, value and characteristics of the market to be addressed, and the marketing phase, which is related to the actions carried out based on the latter information (Benassini 2009).

Market analysis must be carried out from the beginning of the innovation process. This facilitates the identification of both problems and opportunities (Kamboj and Rahman 2015). Carrying out this procedure requires the consideration of three important components: the consumer; the competence; and the inter-functional coordination. The first two components require specific research efforts and diffusion in the company while the third involves the coordination of the organisation to create greater value, according to the information acquired (Augusto and Coelho 2009; Falasca et al. 2017).

The marketing and innovation functions are established according to the target market. This is fundamental insofar as the organisation perceives that its main purpose is to create for the clients, and above all to define how the business will work (Menguc and Auh 2006).

A continuous relationship between the organisation and the consumer will provide information regarding: 1) attitudes and possible responses to certain stimuli; 2) assumptions and social and cultural imaginaries; 3) sensations, feelings and emotions that they encourage in both consuming or purchasing decisions; 4) the images, symbols and associations they create with respect to products; 5) motivations and ways of acting; and 6) the personality and common features of groups (Benassini 2009; Falasca et al. 2017). The consumer knowledge information can be guided as intellectual capital at a strategic level, can be included in strategic planning, and will provide opportunities for creating responsible solutions for the organisation. Additionally, it will enable the introduction of innovative products to the market, which can effectively and quickly pass on values to the market segment (Falasca et al. 2017).

It should be noted that most SMEs are not competitive. Therefore, they must always take into account their size and their position in the industry in relation to competitors (Kotler and Armstrong 2012). Therefore, it is vital to know the strengths and weaknesses of competitors (Affendy, Asmat-Nizam, and Farid 2015) and to understand all the relationships with the consumer. Another advantage of knowing the competition is that it allows the organisation to protect and improve the current positioning of its brand (Augusto and Coelho 2009) and products (goods or services).

However, it is worth noting that consumer and competitor analysis will only benefit an organisation if, at the same time, it is complemented by its own high innovation capabilities (Menguc and Auh 2006).

Furthermore, implementation of these variables depends on three factors (Kok and Biemans 2009): 1) the characteristics of the environment, such as market structure, consumer turbulence, technological change and industry competitiveness; 2) the characteristics of the innovation, such as the technical complexity of the products and processes, and the durability of the technology; and finally, 3) the characteristics of the organisation, which includes the decisions and actions taken during strategy formulation, capabilities definition and organisational structure analysis.

Perreault and McCarthy (2002) propose a marketing plan to respond to changes in the market. This plan is composed of four elements: the product; the price; the promotion; and the place. The last two are the keys to communication and sale of the product to the consumer, so they will be explained in more detail.

Promotion is used by organisations to communicate with customers and clients with respect to their products, thus companies can influence their actions and behaviours (Perreault and McCarthy 2002). That is why they must transmit understandable and credible messages through the most efficient channels (Benassini 2009). In short, they must demonstrate that "the right product is available in the right place for the right price" (Perreault and McCarthy 2002: 392).

The place refers to the contact points generated with the consumer, where products are shown in convenient places for promotion or sale, and always having clear distribution modes. The place is not always referred to in a physical way, but rather virtual means can be used to reach consumers (Perreault and McCarthy 2002). In addition, it must be taken into account that when a new point of contact is produced, an immediate acceptance or rejection of the product is generated (Benassini 2009). In addition, in this last point, consumer satisfaction after having purchased the product should not be overlooked. It is important that organisations generate the means to receive consumer input and thus improve service and quality (Affendy, Asmat-Nizam, and Farid 2015).

Finally, it is important to consider responsible practices throughout the development of marketing − that is, sustainable actions that can help establish, for example, green brands, changes in contemporary lifestyles, or the introduction of greener patterns of consumption where environmentally friendly products can contribute to creating competitive advantage for the organisation (Pickett Baker and Ozaki 2008; Crittenden et al. 2011).

Capabilities and Dynamic Capabilities

One of the central ideas of this article is the concept of "capability". From a theoretical approach called the resource-based view (RBV), it is argued that some companies have sustainable advantages over others because they first deploy resources through differentiated capabilities. In this way, the achievement of factors that differentiate companies is what underlies their performance (Nelson 1991; Fernández-Mesa et al. 2013).

Capabilities in an organisation refer to recurring patterns of behavioural routines or actions as a result of the deployment of the visible resources, skills and assets of an organisation. Additionally, they are addressed to perform activities or tasks in the most efficient and effective way, assuming that desired results are consistent with original intent (Renard and Saint-Amant 2003; Aguilar-Zambrano 2005).

On the other hand, the concept of dynamic capability (Eisenhardt and Martin 2000) appears because although capabilities are efficient and effective, their recurrent character is contradictory. This means that, by their nature, learning processes are hindered despite their having an advantage in terms of efficiency. In this way, some of these capabilities should be oriented towards responding to the challenges that the changing world imposes on organisations. The concept of dynamic capability consists of: "…specific strategic and organizational processes like product development, alliancing, and strategic decision making that create value for firms within dynamic markets by manipulating resources into new value-creating strategies" (Eisenhardt and Martin 2000: 1106). In this way, dynamic capabilities reflect the mechanism for generating new innovative ways to build sustainable advantages (Teece 1997). Adler, Goldoftas, and Levine (1999) define these dynamic capabilities, or "meta-routines", of learning as transforming in a systematic way the creative process of searching for new opportunities.

From the organisational perspective, design possesses other types of learning and creation practices. Firstly, being an exploration process, organisational learning plays an important role in the reconfiguration of design resources (Zollo and Winter 2002; Easterby-Smith and Prieto 2008). Secondly, supposing that in design processes there are no single results, consequently this opens up the possibility for processes for the exploration of new practices and results (goods, services, processes, strategies, decisions, and ideas). In this context, the role of dynamic capabilities is to achieve advantages through the reconfiguration of design resources with existing organisational capabilities in response to the search for advantages in dynamic and uncertain markets (Hatchuel, Lemasson, and Weil 1994; Teece 1997; Menguc and Auh 2006). For this reason, design management capabilities are a dynamic capacity that is constituted through the reconfiguration of design resources with other resources or the traditional capabilities of the organisation.

In any case, it should be noted that in order to facilitate the company to obtain a great competitive advantage in the face of competition in a dynamic market, a skills portfolio or capabilities catalogue must be built (Medina-Garrido 1999). This package includes design and innovation capabilities, which refer to the trends and positions taken by the company in the face of innovative behaviour, the ability of the organisation to find new opportunities in future markets, and the adoption of new mentalities and attitudes that can be taken into different areas of the organisation (Menguc and Auh 2006; Carlgren et al. 2014).

Self-Recognition and Identity

A firm's self-recognition starts with the identification, delimitation and development of the company identity. It can be manifested through the brand's proposal or products, which summarise the rational and emotional benefits that generate a bond of belonging with both the consumer and shareholders (Ellwood 2002; Orozco-Toro and Ferré-Pavia 2012). In other words, identity is the essence that every organisation possesses and makes visible to the actors involved. According to Ellwood (2002), identity must be externalised in all parts of the business, such as internal culture, products and services or modes of communication.

Within the firm's self-recognition, it is vital to be clear about the company's strategic marketing orientation in order to fulfil the promise of value and be competitive. The strategic orientation of marketing guides the behaviour of the organisation and its performance according to the competitive strategies and capabilities (Parnell 2006). Each strategic decision is the choice of a path that stands out from the others according to the type of competitive advantage sought and the scope of the strategic objective (Porter 1985).

For the proposed method, four orientation types of strategic marketing were selected. They are derived from Kotler's marketing orientations: production; product; sales; and marketing (Kotler and Armstrong 2012). Production-oriented companies seek to produce large volumes efficiently, together with a broad distribution capacity (Shoham 2000); that is, the consumer prefers available and accessible products (Kotler and Armstrong 2012). The second orientation corresponds to the product, and occurs when the consumer seeks both high-quality product and performance, and so the company works to continually improve these characteristics (Kotler and Armstrong 2012). Marketing orientation implies directing the company's competitive advantage to a specific market segment; as a consequence, it is necessary to know the needs of a particular segment and to be able to satisfy them effectively (Kotler and Armstrong 2012). For this reason, companies must understand the information provided by a changing market and the reality of the industry (Parnell 2006) in order to analyse and respond accordingly. Finally, an organisation focuses on sales when it increases competition, so there is a greater supply of products than what is demanded. In these cases, the aim is to induce the user to buy a product that is not normally considered and, if possible, for the acquisition to be repeated in the future (Lecuona 2000).

One of strategic design's most significant contributions to organisations is focused on the generation of a product-service system. This type of project starts with the recognition of the environment and the consumer to establish an identity. Identity should be consistent with the needs and expectations of demand, and the company's technological and organisational capabilities. A products network and services and communication strategies allow us to provide feedback to the organisation regarding the value it generates for its consumer. Additionally, it provides solutions that allow the promoting of socio-cultural and environmental responsibility, aiming to preserve the profitability of the company by the organisational identity and enhance the company through the culture in which it is immersed. Consequently, all of the above makes the design strategy a "win-win" decision (Meroni 2008).

In conclusion, practices can be approached from different factors (Crittenden et al. 2011): the first and most relevant to this project is the construction of an identity (or the DNA of the brand) that addresses the behaviours developed from the culture (related to why organisations do something in a certain way) and the business climate (what the company does, that is, the specific behaviours). These can be incorporated by means of two different strategies: the inclusion of products and practices that provide evidence of changes in mentality to consumers or the implementation of small changes as daily routines.

Methodology

The Method behind the Method

The methodology used for the proposed design method (called the Aúne Method) has seven steps (see Figure 8-1): 1) definition, 2) co-design, 3) methodological validation, 4) method development, 5) rapid prototyping, 6) usability validation, and 7) detail design.

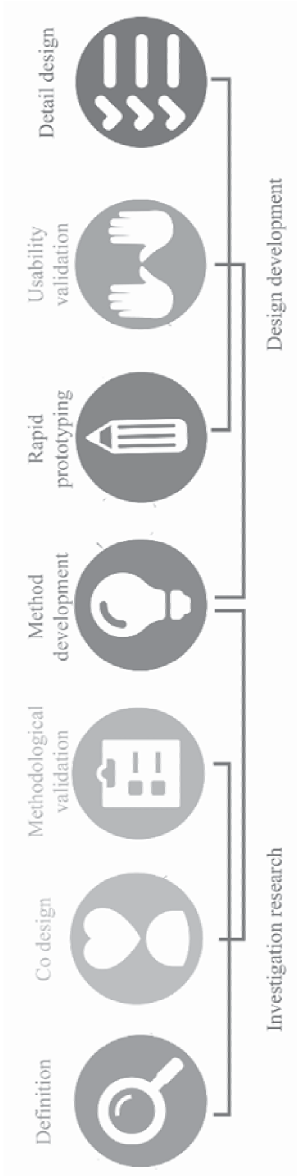

Figure 8-1 Steps of the Methodology
Source: Own Elaboration

The design process method was initially defined through a draft of the initial model of the method based on the literature review. Then, some co-design workshops were held with two SMEs in order to collect information about the first model and generate feedback and validation of the literature findings. This process is a traditional approach in qualitative research strategies.

The design process had the goal of joining and reporting the meaningful findings of both the first draft and the experimental data together, through design tools, into the "Aúne Method".

In order to enhance the validity, reliability and objectivity of the design process of the model and to minimise the risk of a proposal based on speculation, an iterative process strategy was proposed. At each step certain aims were developed that accomplished the feedback from the step before and encouraged the team to design loop reflections about the coherence of the method using metacognition and continuous improvement tasks.

Each iterative model helped to validate and identify new elements for the construction of the model. Design strategies for building up the model include prospective visualisation and examined emotional and aesthetic factors during workshops. All these processes included traditional economic, social and cultural aspects and required a combination of logical and intuitive thinking in a participatory way.

The methodological inertia allowed the team to identify insights that ensured not only the method success but investigative rigour.

That flow can be explained by the following order: 1, 2, 1, 4, 3, 4, 6, 5, 6 and 7 (numbers according to the steps of Figure 8-2).

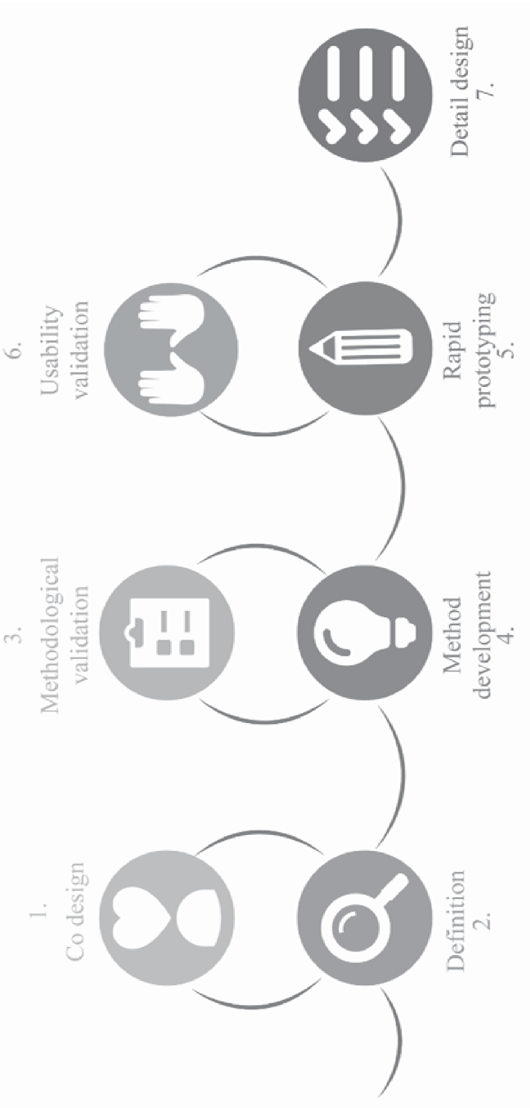

Figure 8-2 Methodology Flow
Source: Own Elaboration (Adapted from tools of Design Thinking Method).

Development of the Methodology

As discussed above, marketing strategies are fundamental for generating a firm's sustainable advantages. However, there are two concepts that need to be addressed in these strategies. On the one hand, how the marketing approach is aligned with the general strategy of the company and based on fitting both identity and image to support the company's loyal customers. On the other hand, there is great evidence of the need to identify, consolidate and reconfigure capabilities that support the operational activities and strategies of the organisation. Both concepts can be expressed through stages of self-recognition of companies' know-how and can be reconfigured towards innovation.

Thus, based on the basic models of decision-making, strategic marketing and the perspective of the organisation's capabilities, the Aúne Method is proposed for increasing the speed of the implementation of strategic marketing decisions. For the designing of the model, strategies and tools of design were used. The design strategies allowed iteration processes to be performed and applied not only in the design of the methodology explained previously (see "The Method Behind the Method" section), but also in the strategic tools developed in the Aúne Method.

The Aúne Method facilitates strategic decisions to introduce a new product to the market. The final product of the method is to have the elements to make decisions for a company's marketing strategy. The method has three phases: the competitiveness factors analysis; the market analysis phase; and the advertising and sales phase.

Each of the phases has a set of tools aimed at creating an identity for the organisation. All of them constitute the elements for decision-making, which feeds the decision elements for the definition of a marketing strategy for the company.

The competitiveness phase serves to identify potential elements that the company possesses and to have inputs to develop strategies according to their know-how and their expectations.

The market analysis phase allows the consumer and the competition to be identified, based on a set of trends and formal referents. Additionally, this phase allows us to inquire about the possibilities of product development with a high level of novelty.

The advertising and sales phase considers how a product will be promoted and sold in the market. For this purpose, tools were designed that allow, on the one hand, the strengthening of the channels that make it possible to bring the brand closer to the consumer, and on the other hand, the structuring of the sales and after-sales experience to the customer.

Each of the phases has several tools that will help to acquire most of the information required to obtain the final goal.

The competitiveness phase includes market orientation analysis, brand DNA, organisational capabilities, and social and environmental responsibility. The marketing analysis phase contains the tools for defining the consumer, the competition, the referents and trends. And finally, the advertising and sales phase has the tools for channels, sales experience and after-sales.

Each tool for the different phases has a group of questions, forms, or diagrams, whose results are accumulated in a single instrument for decision-making and which process is called strategic marketing planning.

Initial Model Proposition (Definition)

The model started with the interpretation of different terms in the literature review. Thus, an initial model was established, which is presented in a linear manner (See Figure 8-3). This previous model included the first approach of marketing and design. The literature talks about a value chain; however, in the first model, it was a "marketing chain", which linked aspects related to market analysis, sales and advertising, and new product development. This first model proposition served both as the basis for the validation of the concepts with the SMEs contacted and the first part of the model design.

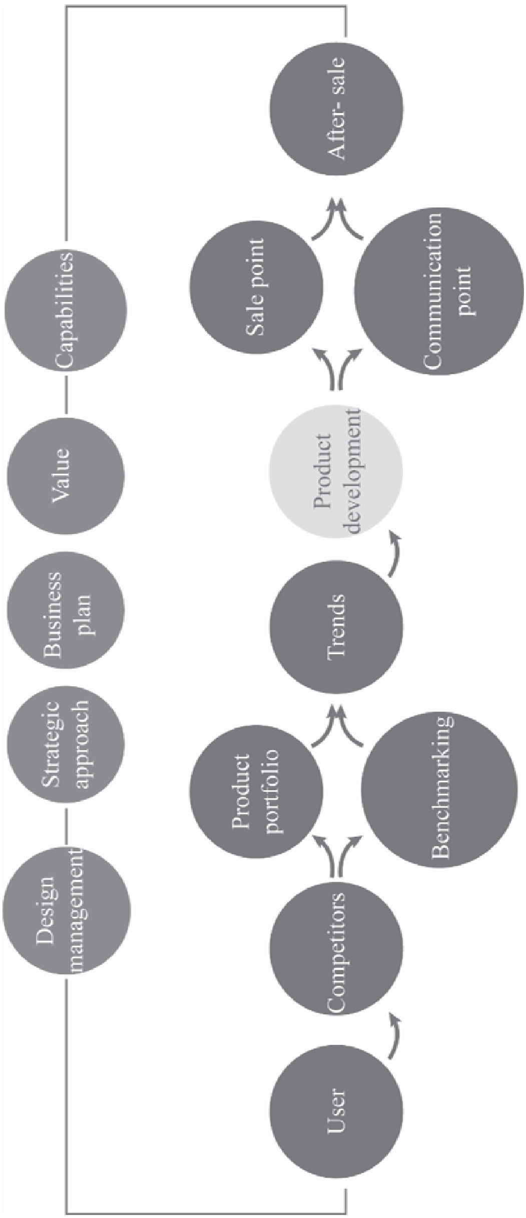

Figure 8-3 Initial Proposition
Source: Own Elaboration

Designing the Method

Based on the first proposed model, we proceed to establish contact with three SMEs from the Colombian leather goods industry. With this exercise, the participatory design process began with the organisations contacted. Different sessions were held that allowed the validation of the model proposed in Figure 8-3 to detect the aspects that had been contemplated in the literature review. This interaction allows organisations to provide the necessary knowledge of the sector, creating an interdisciplinary process in the environment − in other words, design with and for the consumer.

This co-design process with the companies is generated from activities based on instructional design. It consists of resources and environments planned, prepared and designed to facilitate learning (Laverde 2008) − in this case, from the literature review and an instruction process designed by phases that were developed at different sessions, using the respective characterisation tools that are designed to achieve each goal.

Tools

For the firm's analysis, different methodological tools (most of them design-specific) were collected during the research phase. In addition to field observation and participatory design, the diagnosis was used to make a new approach model, which established the guidelines for developing the detailed design of the method.

Below is a brief description of the methodological tools used to develop the Aúne Method.

Empathy map (Gray, Brown, and Macanufo 2010): this tool, developed by Scott Matthews, facilitates the collection of information about users, then disseminates this information to stakeholders, and then makes decisions.

Blueprint (Shostack 1984): this is a strategic tool to visualise the whole service process. Its approach must conclude with a high level of detail, explaining visible scenarios for users and the processes used behind the scenes. For the blueprint development, first you must identify the processes that constitute the service; from there, you can detect the parts where a flaw could happen, then you can consider the execution of the service, taking into account, mainly, the time and the cost-benefit for the consumer.

Knolling: this tool is used to photograph previously organised objects. Sachs (2011) explains that in order to generate this composition, first important objects must be found in the work environment, then be grouped by similarity, and finally lined up on a surface. The ultimate purpose is to be able to take a photograph from above that in the end can be shared for others.

DEM diagram (Bohórquez-Obando and Soto-Condo 2014): The DEM diagram is born from the results of an undergraduate project at the National University in Colombia. Its function is to characterise and identify brand experience behaviour through eight variables: advertising; space; showcase; brand spirit; clothing; service; packaging; transportation and technology.

Methodological model for research projects: This model involves research methods based on design (Lindo 2017). It is focused on synthesising the knowledge of the user, the market and the chain of actors involved in the project development. The method increases the potential for the insertion of design research projects into the market. This is an applied research methodology approach. To develop the Aúne Method, knowledge of the market was emphasised, through tools of "competitive intelligence", whose intention is to know the companies' and rivals' brands based on their products and services, communication and advertising, the distribution channels used and the sale prices.

The Final Model: The Proposed Method (Definition-Method Development)

From the visits to the companies, the initial proposed model in Figure 8-3 was not faithful to the companies' thinking model, since these companies usually perform tasks corresponding to different marketing phases developed in a simultaneous way. The final model scheme, therefore, makes more sense in a circular format (see Figure 8-4).

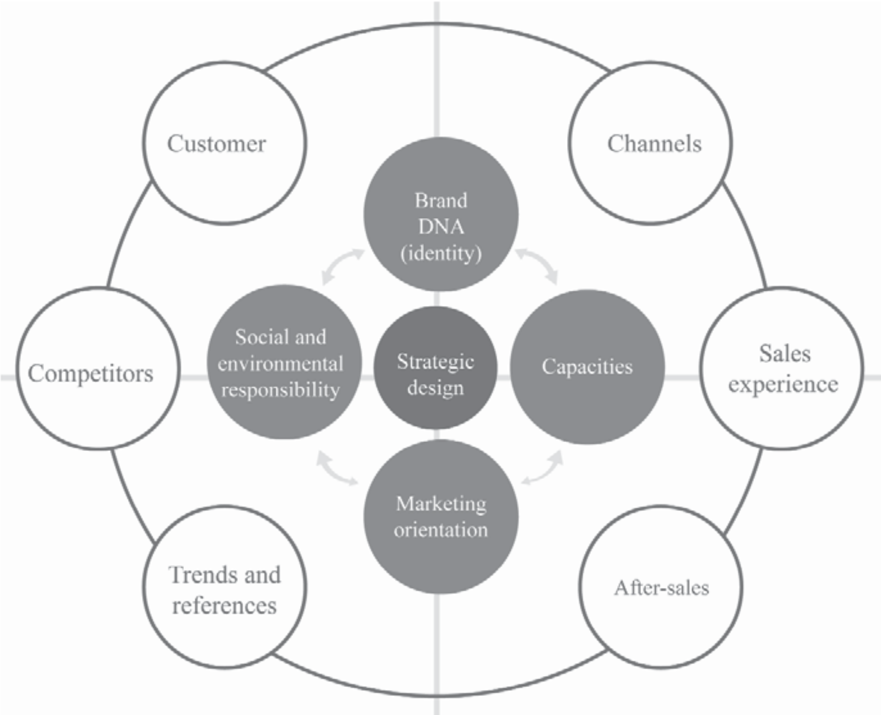

Figure 8-4 A Methodological Model Based on Co-design with Managers
Source: Own Elaboration

Testing of the Method (Rapid Prototyping-Usability Validation-Detail Design)

In order to test the new proposed method and verify the understanding of it by different people, three tests were created. The second test was made with a manager of another industry with the purpose of establishing the possibility of replicating it in other industries, and the third was oriented toward identifying usability and pedagogy problems. That was supported by two language and systems teachers.

Results

The Concept of the Method

Making a strategic decision about marketing requires all the necessary factors to be considered in order to reach the desired results. During the process, it is important to accept that risks and uncertainty will be part of the challenges faced, but this is the learning process. Create a method that allows for combining all of the efforts and knowledge acquired to innovate and be a competitive SME.

Brief Activity Definition

Marketing is a necessary process in organisations. It enables product, process and strategy innovation. For this reason, marketing implementation within companies must be developed regardless of whether or not a specific area exists that encourages its development.

What is Designed?

An instrument is proposed that facilitates decision-making and provides the development of marketing strategies in an autonomous way by SME managers in the leather goods industry. This allows the implementation or strengthening of the phases related to novel products about to be introduced into the market.

What is it Designed For?

The Aúne Method provides tools that support SMEs in projecting and planning marketing strategies based on the company's strengths and competitive factors, and at the same time it encourages the development of those characteristics that are not yet the main skills of the company. Additionally, it facilitates the development of market analysis, product advertising and sales, which, added to competitiveness factors, facilitate the generation of marketing strategies.

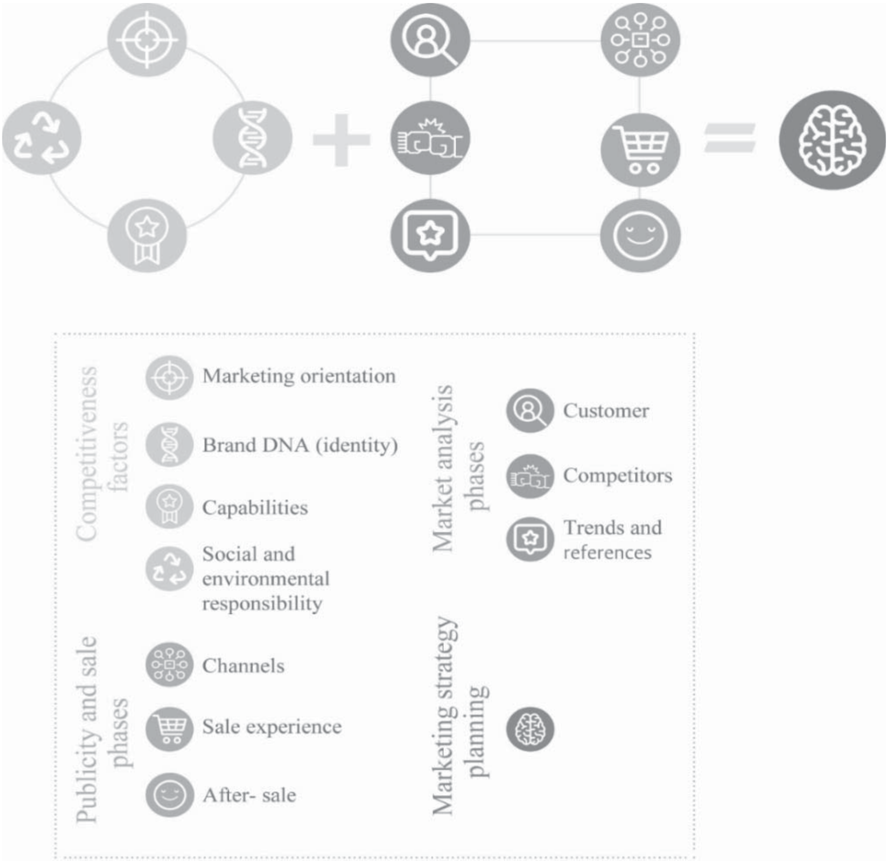

Figure 8-5 Alignment to Achieve the Marketing Strategy Planning
Source: Own Elaboration

Figure 8-5 includes the basic operating scheme of the method. The upper part is the sum that will result in strategic marketing planning and the lower part shows the legend.

The yellow icons making up the circle are the competitiveness factors that allow us to recognise what the company has to have in order to develop a competitive marketing plan; for this reason, it is recommended that managers work on the four topics shown.

Once the organisation scope is defined, the method contemplates strengthening those phases in which the marketing area acts (three icons on the upper-right side) in order to build up the advertising and sales factors (three icons on the lower-left side). Booklets and tools for these two sections are designed to be filled out under the consideration of managers according to their needs.

Why it is Designed?

It seeks to promote SME competitiveness, because they are the majority of companies in Colombia. Similarly, the method is proposed to be implemented in the leather goods sector, this being the area of the manufacturing industry most affected by the economy of the country.

The Aúne Method

The method provides manager guides in the form of booklets and tools to develop marketing strategic planning. The method seeks to facilitate the introduction of novel products to the market through the recognition and visibility of the organisation's strengths. The above is achieved through the strengthening of current capabilities and is associated with the marketing orientation which is built on the identity of the company and its social and environmental responsibility as a basis for competitive advantage.

The method allows and encourages companies' autonomy and freedom to decide what to prioritise or to solve depending on the time and the actual situation. This means that whenever they consider they need to generate strategies in a different phase, they can use the same factors of competitiveness (if they have not changed over time). In addition, at the same time, managers can go to the implementation of the necessary tool to obtain results. When they have complemented the competitiveness factor, decision-making alternatives are available, since they have taken into account the history and capabilities of the company and what the company represents.

The tools included in the method are documents that enable the visualisation of the booklets' outcome results. These results are necessary inputs of the strategic marketing planning booklet (which also has its own tool sheet to project the strategy and the decisions for its execution). The information resulting from the competitiveness factors, the market analysis and the advertising and sales phases are included in a sheet on the tool. This results in a marketing strategy that includes the decisions that must be made to carry out the strategy.

What is Included in the Method

The Aúne Method consists of 12 booklets and 14 tools annexes for each section. The first booklet is a general explanation and guidelines for applying the Aúne Method, and the remainder of the booklets are divided into four sections. They are divided by colours that follow an implementation order: strategic marketing planning; competitiveness factors; market analysis phases; and the advertising and sales phases.

Product Architecture

The product architecture corresponds to the method booklets and is the scheme by which the functional elements of the method are organised in a coherent manner (Whitney 2004).

Below is the information on the types of booklets, with their functionality and exemplification included in the figures. It is important to mention that the booklets are designed in Spanish, using colloquial words inherent to the leather goods sector.

Aúne Method - Booklet and Strategic Marketing Planning Tool

Aúne Method booklet: This condenses the general information regarding the method, emphasising the importance of the application. Additionally, it describes the parts that compose it.

Strategic marketing planning tool: This is the blue-coloured tool that guides the whole process of the methodology and helps to project the necessary strategy to strengthen the marketing phases. In addition, it provides examples of alternatives that can be used to reach decisions, depending on the phase that managers want to strengthen.

Figure 8-6 has information referring to the legends for each part of the method. Additionally, it includes the method's basic definitions (See Figure 8-7 and Figure 8-8).

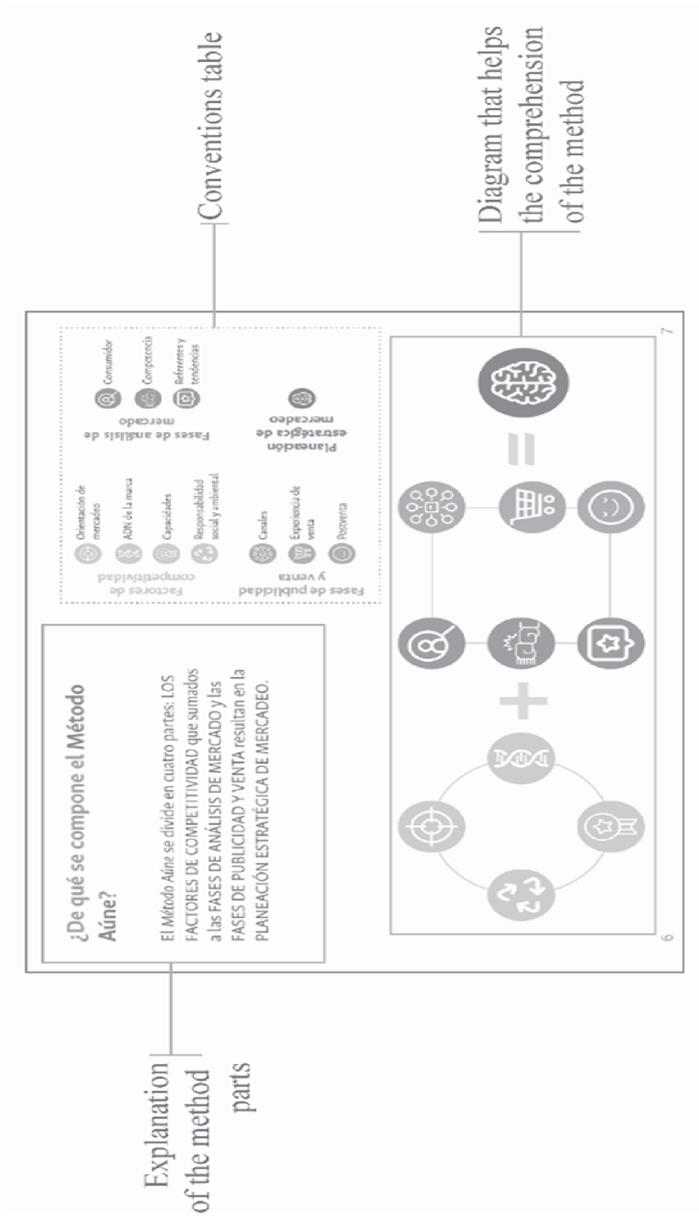

Figure 8-6 Map Legends
Source: Own Elaboration

Figure 8-7 Basic Definitions about Phases and Factors of Competitiveness
Source: Own Elaboration

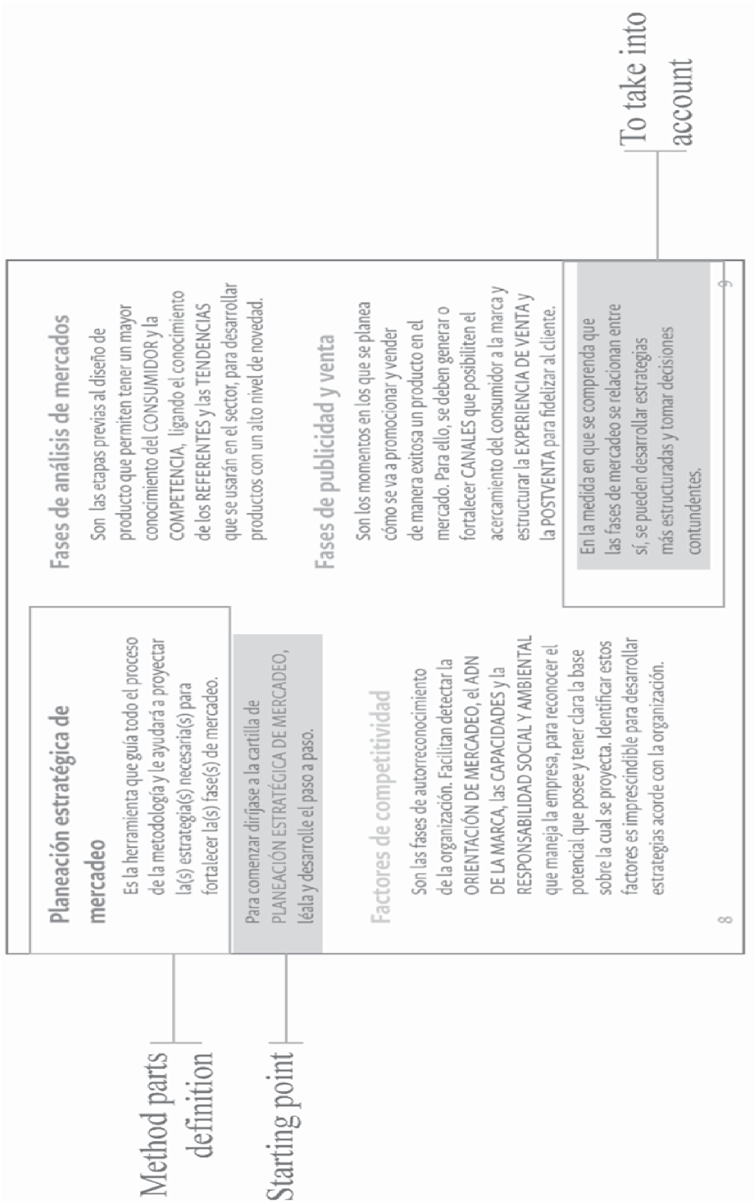

Figure 8-8 Basic Definition of the Method Parts
Source: Own Elaboration

Booklets of the Stages and Factors

The booklets correspond to each of the marketing phases and the competitiveness factors that were detected in the theoretical proposal and were evaluated when they were contrasted with practical experience. The booklets are intended to guide managers through the self-recognition of their skills that need to be strengthened.

Competitiveness factors: These facilitate the detection of the marketing orientation, brand DNA, capabilities, and social and environmental responsibility of companies. Additionally, they offer more grounded notions about the potential they have to follow aesthetic, productive and functional guidelines that allow you to reconfigure the products without losing brand identity. Identifying these factors is essential to develop strategies that accord with the organisation. In addition, it helps to recognise the company in terms of its value proposition.

At this point, the method orientation is aimed at making an analysis of the necessary aspects to be strengthened. It is divided into two stages: the analysis market stage (green booklets) and the advertising and sales stage (orange booklets). These should be developed according to either the companies' needs or their interests, so as to strengthen one or several phases immersed within the marketing function.

Market analysis stage: This is the stage prior to product design; it allows greater knowledge of the consumer and competition, linking information of referents' knowledge and trends. These latter aspects will be used in the industry to develop products with high-level novelty.

Stages of advertising and sales: These are settings for planning how to achieve the successful promotion and selling of a product in the market. To do that, channels of distribution must be created or strengthened to enable the consumer to access the brand, and the sales and after-sales experience must be structured in a way to build customer loyalty.

Each booklet has a specific pattern for showing the information. Based on the example of the Competence Analysis booklet, the following will describe the booklets' architecture. For example, Figure 8-9 describes the Competence Analysis booklet cover. Additionally, Figure 8-9 uses the green colour code, which for this particular case refers to the market analysis phase. The cover (Figure 8-9) describes the name of the phase to be addressed, the category and the icon that represents the phase.

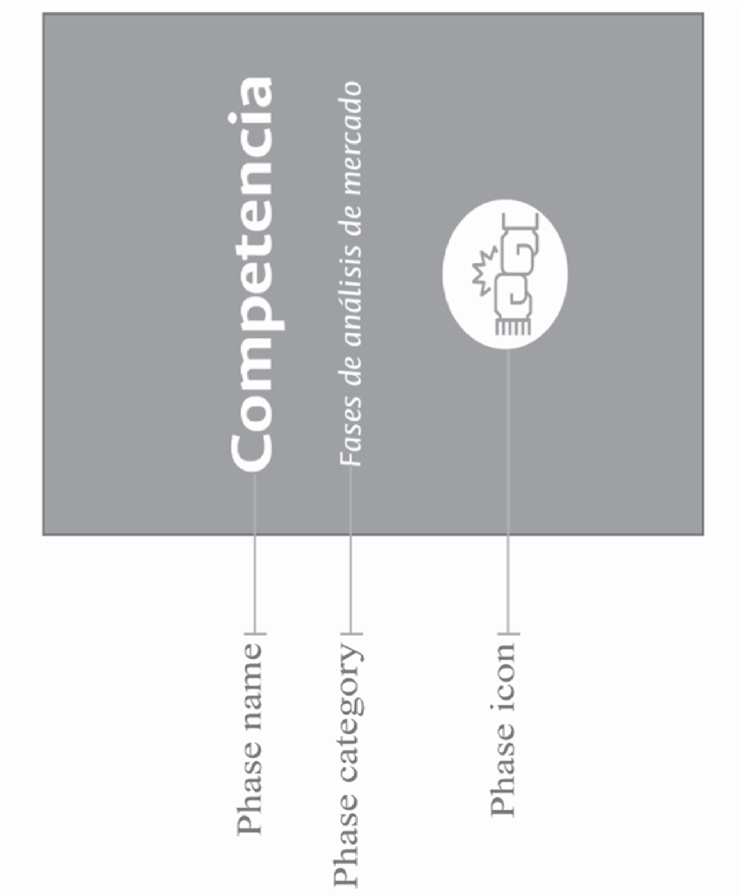

Figure 8-9 Booklet Cover - Competence Analysis (legends of figure in Spanish)
Source: Own Elaboration

Figure 8-10 shows another example where instructions are described, prior to the tool development; in this way managers can understand how they can enhance the area of interest they choose using more booklets.

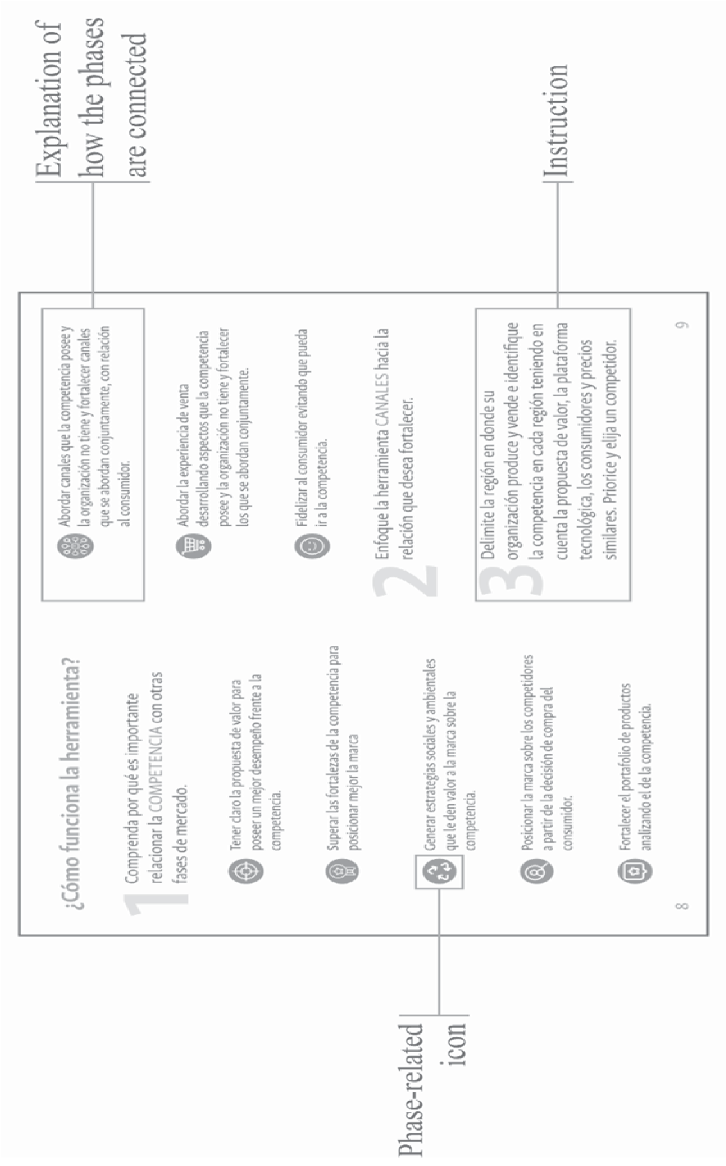

Figure 8-10 Instructions and Related Information to Other Phases
Source: Own Elaboration

Some Tools of the Aúne Method

The tools are the practical elements of the method that allow managers to organise information collected from the market and the organisation. For each booklet, there are tool formats. The objective is to feedback the main tool corresponding to the marketing strategic planning.

For example, the "Brands" DNA tool (see Figure 8-11) is designed to facilitate visualisation through words that highlight and distinguish brand attributes. In the same way, the "Capabilities" tool (see Figure 8-12) seeks to recognise the organisational know-how through the identification of strengths and how to develop such strengths within the company. Each of the tools were designed in the same way: the "Social and Environmental Responsibility" tool; the "Consumer/User" tool; the "Consumer/Client-organisation" tool; the "Competence" tool; the "Referents and Trends" tool; the "The Market Channels" tool; the three tools of "Sales Experience"; and the "After-sales" tool.

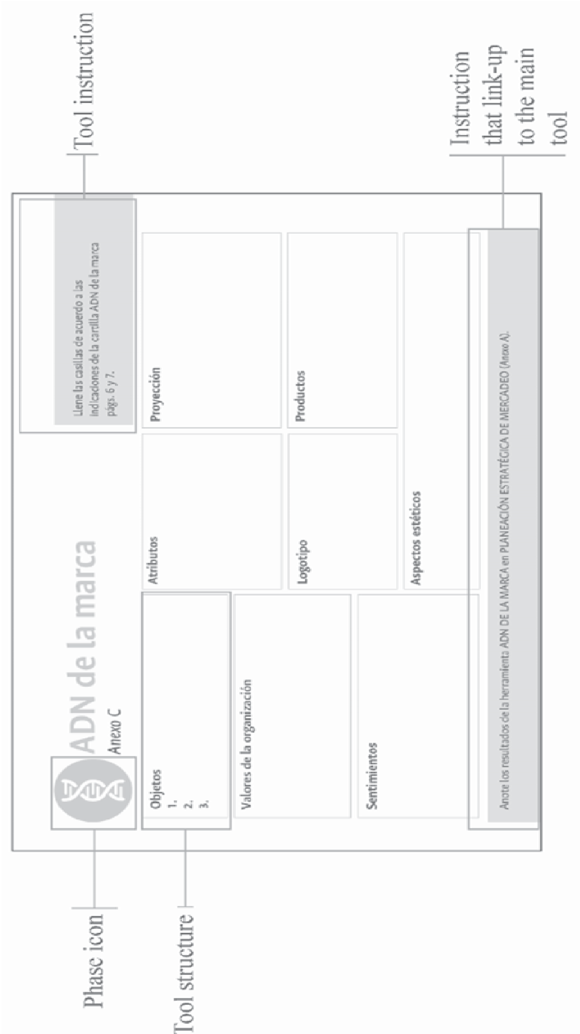

Figure 8-11 The Brands DNA Tool
Source: Own Elaboration

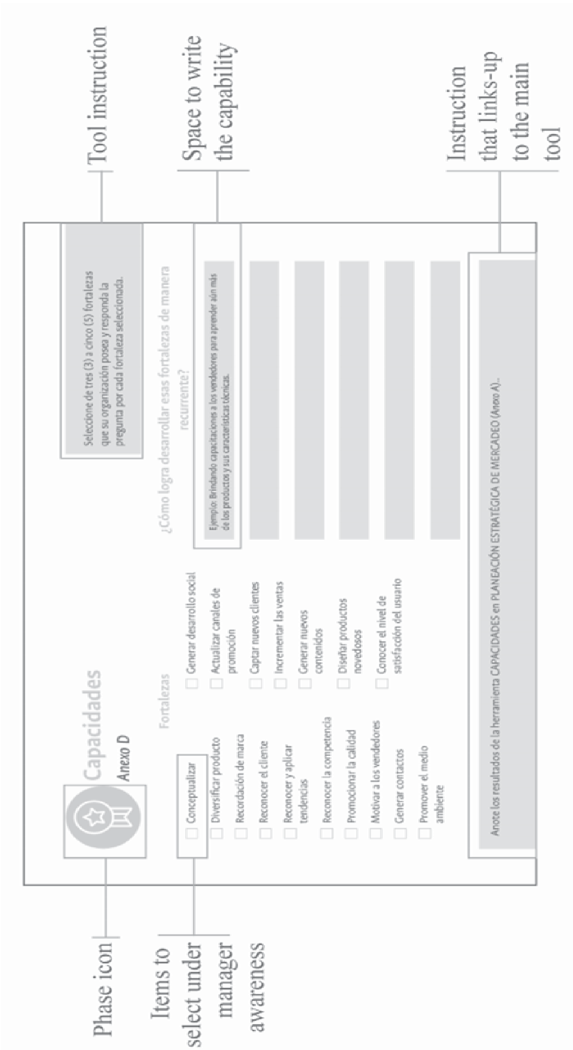

Figure 8-12 Capabilities
Source: Own Elaboration

Conclusions

This document is developed for the specific context of the Colombian leather goods industry. This sector is highly competitive and hostile. The fieldwork findings (not statistically representative) provided the evidence to indicate that the focus of this industry has not changed during the last decades and the efforts of organisations are focused on increasing productivity, leaving aside key aspects of differentiation and positioning, such as market analysis and product design.

The method was developed to generate strategies and make marketing decisions through an adaptive model from the design perspective. This allowed the problem to be addressed by creating a method that promotes the development of product-service systems, integrating variables such as actors and resources in the same instrument. This view allows greater coherence between the factors and the phases of the system, which together enhance and offer consistent strategic marketing decisions. Therefore, the proposed method makes possible different dynamics where the necessity to involve the design is shown and demonstrates the importance of this instrument for generating competitive and sustainable advantages. On the other hand, the method allows, first, the delving deeper into issues that are not usually considered, like market trends or themes related to social-environmental responsibility, and second, to identify, in a conscious way, aspects that the firm already have, like the brand identity or their capabilities, and put these into practice during the design process.

The provided tools can be adapted, regardless of whether the organisation's focus is on costs, sales, product or market. What is important to highlight is that marketing strategies must always be consistent with the brand's competitiveness factors, in order to strengthen corresponding marketing phases and avoid non-aligned decisions.

In small enterprises, the tools are guidelines to identify, analyse, decide on and reconsider the market strategies, and at the end, decisions can result in products with a high innovation level.

As a consequence, an organisation can develop new core capabilities based on: i) the consumer perceiving the brand value through products with a high level of innovation; ii), a strategic consistency generated on the current basis of the operation of the company and its promise of value; and iii) the marketing phases being integrated with the competitiveness factors in an appropriate manner, which allows for reconfiguring the capabilities to develop innovation processes.

This study was based on two pillars: research and participative design. Although research sets the pace and provides clues to develop a first mapping of the situation, it is not enough, because the theory does not focus on the heterogeneity of specific contexts like Colombian SMEs. Thus, participatory work is fundamental for generating coherent proposals with the environment to which it is addressed. On the other hand, during the study different limitations were presented. The participative stage was restricted to the disposition of the managers and complications in the logistics within the companies.

Design is reaffirmed as a problem-solving method that goes beyond the actual product. Design contributes to organisations and businesses from strategic and systemic perspectives. In this study, the Aúne Method transcends the limits of product design to enhance it through both strategic and organisational marketing factors.

Acknowledgements

We want to thank the support of the leather goods brands managers María Camila Robayo, Fernando García, Alejandro Rosero and Ingrid Pabón, who generously shared their time and experience for the purposes of this research. Also, we are indebted to the Design Department at the School of Arts at the National University of Colombia in Bogota for supporting the research "Innovación y gestión estratégica de diseño: nuevas perspectivas para la construcción participativa de capacidades de diseño en las organizaciones"(Hermes 42359), whose results are presented in this document.

Part V –

Marketing, Creativity and Experiential Design: Future Avenues

Chapter Nine

European Enhancement of Cultural and Creative Tourism: An Overview

Cláudia Helena N. Henriques

Introduction

Tourism represents the "third largest socioeconomic activity in the EU in terms of contribution to GDP and employment, after the trade and distribution and construction sectors" (EC 2014a, 2). In Europe, the total contribution of Travel & Tourism to GDP was 10.4% in 2018 and it was expected to grow by 3.6% in 2019 (WTTC 2019). In terms of employment, Travel & Tourism generated 3.8% of total employment (2018) and this grew by 2.2% in 2019 (3.9% of total employment) (WTTC 2019).

Regarding cultural and creative tourism, it is important to underline that Europe is a major destination "thanks to an incomparable cultural heritage that includes museums, theatres, archaeological sites, historical cities, industrial sites as well as music and gastronomy" (EC 2018). It is estimated that "cultural tourism accounts for 40% of all European tourism; 4 out of 10 tourists choose their destination based on its cultural offering" (Eurobarometer 2017).

In this context, the purpose of this paper is to investigate the European policy aimed at enhancing cultural and creative tourism sustainable development. Accordingly, tourism and culture interconnections are first discussed within the framework of sustainable economic and social development. Secondly, both cultural and creative tourism "importance" and, tourism and culture main "agendas/plans/programmes/reports/actions", among others, are considered in the framework of European policy.

The paper is based on a document analysis as a qualitative research method (Bowen 2009), subsequently associated with content analysis (Bowen 2009; Bardin 2015). European policy analysis was conducted as a systematic procedure for reviewing or evaluating European documents. The documents were organised into three major themes–“tourism policy”, “culture and creativity policy”, and “cultural and creative policy”–and were researched mainly in publications from institutional sites.

Regarding European tourism policy, the paper discusses its links with culture and creativity, and in sequence puts its focus on cultural and creative tourism. Regarding European cultural policy, the analysis focuses on the relationship between culture and tourism. The European policy analysis was combined with a brief evolutionary documental overview, in order to include evidence of policy changes and challenges. Accordingly, there is concern for the “skimming, reading, and interpretation” of documents and a subsequent iterative process that combines elements of content analysis and thematic analysis (Bowen 2009: 32).

Following an international framework based on institutional documents mainly authored by the UN, the UNWTO and UNESCO, this paper presents a study of European tourism and culture policy domains associated with documents from the European Commission and the European Council. In the tourism research field, documents such as “Europe, the world’s No.1 tourist destination–a new political framework for tourism in Europe” (EC 2010: 6) and “Enhancing what European tourism has to offer” (EC 2019a) are highlighted. The European Cultural Routes Programme and trans-European Cultural Routes around UNESCO World Heritage sites and with the UNWTO are also included in evidence.

Regarding culture and creativity policy, the European Agenda for Culture and respective Work Plan are considered, as well as the “Creative Europe Programme”. Regarding the cultural heritage sub-theme, the “European Cultural Heritage Strategy for the 21st century” (CoE 2017) is also analysed.

Finally, the main conclusions are presented.

Tourism and Culture Interconnections in Sustainable Development: The International Framework

The “interconnectivity” between tourism, culture and creativity has been deepening in the context of processes such as the culturalisation of economic life and the economisation of culture. The importance of sectorial “interconnectivity”, as Throsby (2008: 229) highlights, is based on the assumption that culture is “part of a wider and more dynamic sphere of economic activity, with links through to the information and knowledge economies, fostering creativity, embracing new technologies, and feeding innovation”. The OECD, in the study “Tourism and the Creative Economy” (2014), offers evidence of the benefits of interconnections between the cultural and creative sector (CCS) (cultural heritage, publishing and books, advertising, events coordination, architecture, design, fashion, film, gaming, gastronomy, music, performing and visual arts, software and interactive games, television and radio, and media) and sectors such as building, hotels, restoration, cruising, transports, publicity, furnishing, education, telecommunications, packaging, automobile, civil engineering, and town planning, among others. The broadening of the concept of culture–not only including “high culture”, but also “popular culture” and “everyday culture” (Menger 2013)–has also led to the reinforcement of sectorial interconnections and broader impacts such as being “an attractor of creative talent and a catalyst of economic, technological and social innovation and change” (JRC 2017: 32).

A symbiotic interconnectivity between tourism and “culture/creativity” (cultural and creative sector) should consequently be developed in a sustainable framework. “Since its inception in 2015, the 2030 Agenda has provided a blueprint for shared prosperity in a sustainable world” (UN 2019). This action plan “for people, planet and prosperity” is based on 17 sustainable development goals (SDGs) with a total of 169 targets.

Regarding tourism, the World Tourism Organisation and the United Nations Development Programme, in the document *Tourism and the Sustainable Development Goals—Journey to 2030—Highlights* (UNWTO/UN 2017), present a set of “Recommendations for tourism policy”. One of them is that tourism should “Participate in the design of national sustainable development goals strategies and ensure high priority for and integration of sustainable tourism in national policy-making and development planning institutions, as well as policy coherence and integration across inter-linked sectors” (UNWTO/UN 2017). One of the linkages is between tourism and culture.

Accordingly, the “Baseline Report on the Integration of Sustainable Consumption and Production Patterns into Tourism Policies” (UNWTO/UN 2019) shows that “the national tourism policies…portray sustainability as a crosscutting element to all the thematic areas or as a commitment to improve and optimise the balance across the three pillars of sustainable development” (UNWTO/UN 2019: 38). Among the thematic areas, “Cultural heritage preservation” (UNWTO/UN 2019: 36) is frequently mentioned. Other recent UNWTO initiatives, such as the online Platform to Achieve SDGs through Tourism (2018) and the Sustainable Tourism Policy Talks (2019) provide a discussion framework for future action.

The megatrend towards adding culture as the fourth dimension of sustainability–initiated in 2001–has support in the 2030 Agenda. UNESCO’s culture programme seeks to strengthen the direct implementation of sustainable measures in the following ways: first, protecting and promoting the world's cultural and natural heritage to make cities inclusive, safe, resilient, and sustainable (SDG 11); second, combating the illicit trafficking of cultural objects; third, safeguarding and campaigning for cultural and natural heritage; and, fourth, supporting Cultural and Creative Industries (CCIs), while enhancing fundamental freedoms and participatory systems of governance of culture (SDG 16).

In the last two decades alone, on the policy side, the interconnection between culture/creativity and development is based on documents such as UNESCO's Universal Declaration on Cultural Diversity (2001), UNESCO's Intangible Heritage Convention (2003), the Convention on the Protection and Promotion of the Diversity of Cultural Expressions (2005), UNESCO's The Power of Culture for Development (2010), the UN's Creative Economy Report (2013), UNESCO's first Global Report monitoring the aforementioned 2005 convention (2015), and the second Global Report on the 2005 convention (2018).

In the sequence of the process highlighted, and as underlined in the second Global Report (2018), culture is now recognised as a "driver" and "enabler" of development. Culture is now considered as a "power" to promote sustainable development at a local level (UNESCO 2017). The connection between the 2030 Agenda and this Convention is present in the document titled "Culture in the implementation of the 2030 Agenda: A report by the culture 2030 goal campaign" and in several public debates known as "Create 2030".

This report "provides an analysis of the presence of culture and associated concepts in the annual progress reviews for the SDGs, focusing on the Voluntary National Reviews (VNRs) submitted by State Parties to the UN for the High Level Political Forums (HLPFs) in 2016, 2017, 2018 and 2019" (Culture2030Goal 2019: 6). Unfortunately, the conclusions confirmed "that the potential to relate culture to the SDGs appears to remain largely untapped in national strategies to implement the SDGs" (Culture2030Goal 2019: 6).

However, the report also underlines that "several global cultural networks campaigned under the banner 'The Future We Want Includes Culture' for the inclusion of one specific goal devoted to culture, or for the integration of cultural aspects across the SDGs" (Culture2030Goal 2019) are being developed. The "#culture2015goal campaign", now updated as "#culture2030goal", is based on key messages on the role that culture is playing (or should play) in the implementation of the SDGs. Among the most frequent thematics, culture stands out "at the top of the VNR vision", or as a "strategic element of the national vision", a "value related to citizens' quality of life and social cohesion", an "element of a country's strength, identity and enabler that makes the country attractive and livable", a "vehicle for fostering peace", an "element of the creativity, innovativeness and productivity of a country", and "a policy enabling/accelerating tool", among others (Ibid 2019: 93).

The 4th UNWTO/UNESCO "World Conference on Tourism and Culture: Investing in future generations" (2019) responded "to the calls for action from the past three Declarations on Culture and Tourism", namely the Siem Reap Declaration on Tourism and Culture – Building a New Partnership Model (2015), "which recommends closer and targeted partnerships between stakeholders of culture and tourism", and the 2017 Muscat Declaration on Tourism and Culture – Fostering Sustainable Development (2017), "which encourages the contribution of tourism and culture in national SDG strategies" (UNWTO 2019). The Istanbul Declaration on Tourism and Culture: For the Benefit of All (2018) supports cultural tourism as a driver for safeguarding living heritage, catalysing creativity in cities, and spreading tourism's socioeconomic benefits to all. It puts forward two priorities: 1) creating more inclusive partnerships between tourism and culture stakeholders that contribute to SDG implementation; and 2) promoting tourism development that encourages cultural interaction and ensures the benefits are shared by all communities involved. It intends to promote "tourism development as a tool for safeguarding culture, contributing to sustainable cities and the use of technology to facilitate access for all" (UNWTO/UNESCO 2018: 2).

The 4th Conference promised to "concentrate on technology, visitor management models and the approaches that bring the widest possible range of benefits to both visitors and locals, while safeguarding cultural values and heritage in line with responsible tourism principles and the UNWTO Global Code of Ethics for Tourism" (UNWTO 2019a). It also further highlighted how cultural tourism could make an important contribution to the United Nations' 2030 Agenda in terms of poverty reduction, fighting inequality and promoting inclusive growth.

Cultural and Creativity Tourism in European Policy

Sustainable development "has been at the heart of European policy … [and is] anchored in the European Treaties" (EU 2017). Article 2E of the Treaty of Lisbon (2007) underlines that "the Union shall have competence to carry out actions to support, coordinate or supplement the actions of the Member States". Culture and tourism are included among the areas where such action might take place (EU 2007). It also has been understood in the framework of the 2030 Agenda for Sustainable Development and in various European strategies, namely “Europe 2020” and the future “Europe 2027”.

As the document “Next steps for a sustainable European future” highlights, the EU is committed to playing an active role in maximising progress towards the SDGs and has already attained “significant progresses towards overall achievement” (EU 2016: 26). The Rome Declaration (2017) also shows the EU commitment to the 2030 Agenda and the convergence of economies. “The Reflection Paper Towards a Sustainable Europe by 2030” (EC 2019) launches a debate on further developing the EU’s sustainable development vision and the focus of sectoral policies after 2020, whilst the EU continues to be recognised as “one of the best places to live in the world and the EU Member States are already leading the implementation of the SDGs” (EC 2019: 66).

European Tourism Policy and Culture

Considering European tourism’s importance and competitiveness, it should be highlighted that tourism is recognised as a sector with “great potential” to contribute to “Europe 2020” and “Europe 2027”. As the World Economic Forum (WEF) (2017) points out, Europe is the world region “with the strongest overall T&T competitiveness performance”. According to the Travel & Tourism Competitiveness Index (TTCI), Europe “boasts six of the 10 most competitive countries in the T&T sector, namely Spain (1^{st} place in the TTCI ranking), France (2^{nd}), Germany (3^{rd}), the United Kingdom (UK) (5^{th}), Italy (8^{th}), and Switzerland (10^{th})” (WEF 2017). This region’s performance “continues to lead the rankings thanks to its cultural richness, its excellent tourism service infrastructure, its international openness as well as its perceived safety” (WEF 2017: xi). “Cultural resources and business travel”, as one of the four TTCI pillars, “measures the availability of cultural resources intended in a broad sense including archaeological sites, entertainment facilities and conferences” (WEF 2017). This pillar presents great competitivity in European territory due to its uniqueness, and it boasts five of the 10 most competitive countries in the TTCI, namely Spain (2^{nd}), France (3^{rd}), Italy (5^{th}), Germany (6^{th}), and the UK (7^{th}).

Due to “the transversal character of tourism, the European Commission planned to implement concrete measures by using an integrative approach with other European policies” (Estol, Camilleri, and Font 2018: 465). Consequently, the institutionalisation of tourism policy is considered a priority. However, according to Estol, Camilleri and Font (2018: 424), institutionalisation “requires time and commitment from Member States and stakeholders", and at same time, appeals to interconnection with EU institutions' "legitimacy". Simultaneously, "the local destinations gain visibility and recognition through an active participation in the European networks and beyond" (Estol, Camilleri, and Font 2018: 465). For instance, the Network of European Regions for Competitive and Sustainable Tourism (NECSTouR 2018) also emphasises the linkages and the need for networks between regions with a strong competency in tourism, as well as tourism-related academic organisations such as universities and research institutes, and representatives of sustainable and responsible tourism business associations.

Following the EC Communication from the Commission, "Europe, the world's No.1 tourist destination – a new political framework for tourism in Europe", European tourism policy should be in line with the Lisbon Treaty and "stimulate competitiveness in the sector, while being aware that in the long term, competitiveness is closely linked to the 'sustainable' way in which it is developed" (EC 2010: 6). "Enhancing what European tourism has to offer" shows that "the European Commission works on a number of initiatives to diversify and improve the range of tourism products and services available in areas such as sustainable tourism, accessible tourism, tourism for seniors, and low-season tourism" (EC 2019a).

To encourage sustainable tourism, the Commission:

1) co-funds sustainable transnational tourism products that can contribute to tourism growth;
2) developed a European Tourism Indicators System (ETIS) for destinations, a management tool which helps destinations to monitor, measure and enhance their sustainability performance;
3) supported a successful campaign to develop cycling routes – a great example of sustainable tourism – throughout Europe (EC 2019).

In this context, tourism is "connected to the use and development of natural, historical and cultural assets and to the attractiveness of cities and regions as places to live, work and visit. And it is of course also connected to the development, innovation and diversification of products and services to be acquired by and enjoyed by visitors" (EC 2019b).

Culture as a tourism resource, product or experience is recognised as strategic to the future of tourism competitivity and sustainability. The document "European tourism of the future" (EU 2014a) shows that "European products around cultural and industrial heritage" are the most relevant to respondents. For the future, many other cultural tourist products were considered, such as gastronomy, educational tourism, festivals, and synergies between tourism and creative industries, among others.

Presently, the EC (2019c) continues to recognise a great role for "cultural tourism" in the framework of the European policy on "Internal Market, Industry, Tourism and Entrepreneurship" and its attempt to interconnect different activity sectors. It "represents a great opportunity to showcase European heritage and shared values, and promote Europe as a 'unique tourism destination" (EC 2019c). In accordance with this, the commission, with other international organisations on cultural routes, funds cultural tourism projects (DDG1 2019), including the annual Crossroads of Europe Conference (EC 2019a), among other initiatives.

Since 1998, the Cultural Routes Programme has supported the European cultural tourism strategy by "presenting European history under a variety of themes and perspectives, namely: arts and architecture, history and religious traditions, European landscapes, as well as important historical figures who have marked the history of our continent" (KEA and PPMI 2019: 21). Following the CoE (2018a), it "underscores, as does the Faro Convention, the importance of local citizens and their affinity with their region to understand and identify the cultural heritage". The assumption is that: "Local involvement through the Cultural Routes networks attracts new activities and encourages sustainable tourism, while ensuring that the economic use does not threaten the heritage itself."

The "2018 Cultural Routes of the Council of Europe Programme – Activity Report" (CoE 2018a) demonstrated the existence of 33 certified Cultural Routes, covering a wide range of European themes, including more than 1,600 members crossing some 50 countries in Europe and beyond. It also pointed out that "2018 has been an exceptional year for the Cultural Routes of the Council of Europe", due mainly to new Member States, increased political and financial commitment from current Member States, new certifications, the 20th Anniversary of the European Institute of Cultural Routes, a great number of events, and a presence at international fairs (Paris, Berlin, Madrid), among others (KEA and PPMI 2019). Additionally, the EC (2019c) highlighted these routes' capacity to potentiate local economic development supported by a sustainable and ethical model, "building on local knowledge and skills and often promoting lesser-known destinations" (EC 2019c). Its importance is also associated with territorial integration, both in urban and rural environments: "For instance, 90% of cultural routes are through rural areas" (EC 2019c).

The cultural routes' partnership with the Routes4U Programme should also be highlighted. Its main goal is "to foster regional economic development and promote tourism across Europe, often in cooperation with the European Regional Development Fund" (European Institute of Cultural Routes 2018). Routes4U contributes to activities on the protection of cultural heritage and the promotion of cultural tourism in the four macro-regions [Adriatic-Ionian, the Alpine, the Baltic Sea and the Danube Region]" (CoE 2019: 4).

The Commission is also working with UNESCO to develop trans-European Cultural Routes around UNESCO World Heritage sites (i.e. Royal Europe, Romantic Europe, Ancient Europe, and Underground Europe) and with the UNWTO on the Western Silk Road tourism development: "A particular focus is put on tourism products (routes/itineraries/trains/tourism offers) capitalising on European cultural heritage and CCI-related technologies in promoting these tourism products and enhancing the visitor experience" (EC 2017a).

Testing new support approaches for sustainable tourism in rural areas, access to cultural heritage and the European Creative Industries Alliance Under the Competitiveness and Innovation Programme, three large-scale demonstration projects (CultWays, LIMES and GrowMobile) were launched under the European Mobile and Mobility Industries Alliance (EMMIA) to demonstrate better support for sustainable tourism in rural areas, where innovative mobile solutions could be used to facilitate access to cultural heritage sites, to better inform tourists of the many but often dispersed activities in a region, and/or to offer smarter solutions (EC 2017a).

In this framework, the EDEN [European Destinations of Excellence] initiative (launched in 2006), based on national competitions and promotional campaigns that result in the selection and promotion of a tourist "destination of excellence" for each participating country, should also be mentioned. "It enhances the visibility of emerging European destinations, creates a platform for sharing good practices across Europe and promotes networking between awarded destinations", facilitating stakeholder involvement and developing networks among tourism providers (Estol and Font 2016; Panyik and Anastasiadou 2013; EC 2011; Estol, Camilleri, and Font 2018: 427). So far, rural tourism, intangible heritage and protected areas, aquatic tourism, regeneration of physical sites, accessible tourism and local gastronomy have been the main EDEN themes. In 2017, the eighth EDEN edition, the theme was cultural tourism (EU 2017b: 27).

The European Regional Development Fund (ERDF) supports the competitiveness, sustainability and quality of tourism at regional and local levels.

Cultural European Policy and Tourism

Both the Rome Declaration of 2017 and the European Council of 2017 state that education and culture are key to building inclusive and cohesive societies for all, and to sustaining European competitiveness (EU 2018).

From the perspective of continuity, the European Parliament (2019) emphasises that the European Union's actions in the field of culture supplements Member States' cultural policy in various areas: for example, the preservation of European cultural heritage, cooperation between various countries' cultural institutions, and the promotion of mobility among those working creatively.

Furthermore, at the European policy level, culture has progressively been mainstreamed in different agendas in order to foster socioeconomic development and to enhance the integration of territories within the Union (KEA and PPMI 2019: 17). Presently, the "New European Agenda for Culture" and the "Creative Europe Programme" are the main policy instruments aiming to promote the European cultural dimension and fulfil key societal and economic challenges "via more integrated cultural policies" (EC 2017: 31). Since the adoption of the first "European Agenda for Culture in a Globalising World" in 2007 "culture has been at the heart of European Union policymaking … Culture is understood to be a key driver of growth and job creation, enhancing creativity and innovation through a process of cross-fertilisation" (EC 2017: 31).

Adopted in 2018, the New European Agenda for Culture (succeeding the 2007 Agenda) continues the provision of the strategic framework for EU action in the cultural sector, proposing three strategic objectives with social, economic and external dimensions: 1) Social: address the issue of social inequalities, foster social inclusion and cohesion by promoting cultural participation, mobility of artists and protection of heritage; 2) Economic: support the creative sector by facilitating mobility for cultural operators, by reinforcing the Guarantee Facility, by developing skills and encouraging innovation; and 3) External relations: increase cooperation with international institutions such as UNESCO and other cultural institutes in line with the joint EC-EEAS "Towards an EU strategy for international cultural relations" (KEA and PPMI 2019: 57).

In accordance with innovation objectives, the launching of the Knowledge and Innovation Communities (KICs), planned by the European Institute of Innovation and Technology to start in 2022, would strengthen the interconnection of tourism and CCS and, consequently, the cultural tourism development. Further, the inclusion of culture and creative sectors in the Regional Smart Specialisation Strategies should be a relevant future initiative. At the level of funding programmes, the URBACT and INTERREG programmes and the Horizon 2020 Framework of the European Union are determinants in culture development enhancement (KEA and PPMI 2019: 11).

The Agenda is realised through a new Council Work Plan for Culture (2019–2022) adopted on 22 November 2018 (CoE 2018: 56). It is based on five priorities: 1) sustainability in cultural heritage; 2) cohesion and well-being; 3) an ecosystem supporting artists, cultural and creative professionals and European content; 4) gender equality; and 5) international cultural relations. The priorities are put into practice in 17 concrete actions. This plan is in line with the previous Work Plan for Culture 2015–2018.

The Creative Europe programme (2014–2020, Culture sub-programme and Media sub-programme) was developed in line with the 2020 EU strategy (budget: €1.46 billion for the programming period). The future Creative Europe Programme (2021–2027) will "keep the same overarching objectives as for 2014–2020, namely the promotion of cultural and linguistic diversity/cultural heritage, and the reinforcement of the competitiveness of the cultural and creative sectors" (EC 2018c). However, it is expecting growth in its budget (to €1.85 billion). Among the sectorial actions, it distinguishes a) support to the music sector; b) support to the book and publishing sector; c) support to architecture and cultural heritage sectors; and d) support to other sectors (EC 2018c).

Regarding "support to other sectors", tourism and culture are considered, namely through "targeted actions in favour of the development of the creative aspects of the design and fashion sectors and cultural tourism as well as to their promotion and representation outside the European Union" (EC 2018c).

There are also "Special actions" aimed at rendering visible and tangible European cultural diversity and heritage and nurturing intercultural dialogue, through a) European Capitals of Culture ensuring financial support to Decision No 445/2014/EU of the European Parliament and of the Council; b) European Heritage Label ensuring financial support to Decision No. 1194/2011/EU of the European Parliament and of the Council; c) EU cultural prizes; d) European Heritage Days; and e) Support to European cultural institutions that aim at delivering direct cultural service to European citizens with a large geographical coverage (EC 2018c). These actions integrate the "New work plan".

The goal of European Heritage Days (EHD) is to celebrate the collective memory and identity of European citizens through participatory cultural events in Europe: "The cultural events highlight local skills, traditions, architectural styles and works of art that constitute shared European Heritage" (EU 2017c).

The European Year of Cultural Heritage 2018 was based on the idea that "cultural heritage is a resource for Europe, bringing many social and economic benefits, in terms of intercultural dialogue, social cohesion and economic growth, and promoting European excellence in the sector" (EU 2017c). Consequently, it was expected to increase "access to heritage for all" and more involvement in the managing and caring for it. "The Year will also provide the opportunity to debate, reflect on and make a 'quality leap' in preserving and restoring heritage" (EU 2017c). In order to achieve these objectives, the Commission proposed "information and promotion campaigns, events, and initiatives to be taken at European, national, regional, and local levels" (EU 2017c). Ten European Initiatives were created "based on the 4 key principles": Engagement, Sustainability, Protection, and Innovation. They were: 1. Shared heritage; 2. Heritage at school; 3. Youth for heritage: 4. Heritage in transition; 5. Tourism and Heritage; 6. Cherishing heritage; 7. Heritage at risk; 8. Heritage-related skills; 9. All for heritage; 10. Science for heritage (EU 2018d).

The European Capitals of Culture (ECoC) (since 1985) initiative has been considered one of the "most ambitious cultural projects both in scope and scale, associated with city branding, re-imaging and regeneration using culture and flagships to soften and celebrate urban renewal efforts [and] can be characterised as the festivalisation of city development and of 'identities' – political, economic and community-and as one element in a continuum of thematic 'Years' and 'Cities of…' – of which Culture is just one" (EC 2018a). Its aim is to promote and celebrate Europe's rich cultural diversity and shared aspects of our heritage, and thereby promote mutual understanding and intercultural dialogue (EU 2017a). "According to research on the impact … the European Capital designation increases the city's cultural vibrancy by 50%. 90% of the local population feel that their city became a better place to live" (EC 2018: 165).

The European Heritage Label (EHL) (since 2011–2013) has been given to heritage sites that celebrate and symbolise European history, ideals, and integration (EC 2018b). Sites are assessed according to three main criteria: the symbolic European value of a site; the quality of the project proposed to promote its European dimension; and the quality of the work plan. So far, 29 sites have been designated. The Label has also been seen as a contribution to increasing cultural tourism and bringing significant economic benefits (see Decision 1194/2011/EU of the European Parliament and of the Council).

The EU's cultural policy is also supported by the awarding of prizes in the fields of cultural heritage, architecture, literature and music. The objective of these EU prizes is to highlight the excellent quality and success of European activities in these sectors (EC 2018c). The European Union Prize for Cultural Heritage/Europa Nostra Awards, and others such as the EU prize for Contemporary Architecture, the European Border Breakers Awards, the EU Prize for Literature, and the EU MEDIA Prize – all joint EU/CoE actions – should be highlighted.

Since 2002, the European Union Prize for Cultural Heritage/Europa Nostra Awards have celebrated and promoted excellence in cultural heritage work in Europe, raising its visibility among professionals, decision-makers, and the general public. It also aims to promote high standards and high-quality skills in conservation practice, to stimulate cross-border exchange of knowledge among heritage professionals and to bring together different stakeholders in wider networks throughout Europe (Europa Nostra 2018). Prizes are awarded in four categories: conservation; research; dedicated service by individuals or organisations; and education, training, and awareness-raising (EC 2017a); the prizes are awarded for projects in the countries participating in the Creative Europe Programme.

The importance of the interconnection between the cultural and creative sector and tourism is also evident in the European Creative Districts (Creative Wallonia in Belgium and CREATE in Tuscany, Italy). These districts aim to demonstrate the transformative power of creative industries for the rejuvenation of traditional industrial regions (EU 2017a). Europe also offers a set of satellite data and information enabling the monitoring and protection of cultural heritage, for instance, through the Earth observation Space Programme Copernicus.

Regarding the cultural heritage sub-thematic, it is important to highlight the "European Cultural Heritage Strategy for the 21st century" (CoE 2017). The strategy is based on three components: "social", "territorial and economic development", and "knowledge and education". The "social" component harnesses the assets of heritage in order to promote diversity, the empowerment of heritage communities and participatory governance. It focuses on the relationship between heritage and societies, citizenship, the transmission and sharing of democratic values through participatory governance, and good governance through participatory management (CoE 2017). The "territorial and economic development" component seeks to strengthen the contribution of heritage to sustainable development, based on local resources, tourism, and employment. It focuses on the relationship between cultural heritage and spatial development, the economy and local and regional governance with due regard for the principles of sustainable development (CoE 2017). The "knowledge and education" component focuses, through heritage, on education, research, and lifelong training issues, by establishing heritage knowledge centres and centres for training in heritage trades and professions, by means of appropriate teaching, training, and research programmes. It focuses on the relationship between heritage and shared knowledge, covering awareness-raising, training, and research (CoE 2017). These "components" interact in four areas of convergence: between the social component and the territorial and economic development component; between the territorial and economic development component and the knowledge and education component, between the knowledge and education component and the social component, and lastly, between all three components. The overall consistency and specific nature of this strategy derive from the balance between the various components and their areas of convergence (CoE 2017: 8).

In this context, several challenges should be considered. Delanty (2016: 3–6) highlights the following: "to create a transnational form of heritage that reflects transnational and entangled memories and identities" (ibid: 3); to avoid "new and more inclusive narratives from themselves becoming hegemonic" (ibid: 6); and to "reconcile a conception of heritage that expresses the positive legacy of the past as well as the dark side of history" (ibid). However, as the author explains, "there has not been as yet any comprehensive attempt to reconcile the critique of the European Heritage with the apparent need for contemporary Europe to articulate its identity and values in relation to the past in a way that is more inclusive of all European traditions" (Delanty 2016: 3). Accordingly, and bearing in mind that heritage and memory are interconnected, there is the recognition that memory is often a poor guide to the past. "So the question arises as to the relationship between memory and history … Heritage would appear to have an evaluative dimension in that it is about how the past should be recalled by the present" (Cultural base 2006: 2).

Further, what is needed is "to understand the ways by which European societies interpret themselves, their past and their collective goals and aspirations to arriving at a view as to what the present task should be and how cultural policy making could guide the formation of a narrative that is appropriate for the present day. This challenge is perhaps the central talk of the European cultural heritage today" (Cultural base 2016: 2).

In accordance, the KEA and PPMI (2019: 60) study highlights the most probable "aspirational scenario" [probability index score: 4 (an average score of the likeliness of a scenario)] revealing stakeholders positiveness facing culture and tourism "interconnectivity". It states that:

> the CCS is likely to continue acting as a significant driver of territorial attractiveness, showcasing the diversity of languages and cultures and putting national, regional and local traditions on display. CCS activities have a high potential to act as an additional (or sometimes as a key) factor attracting cultural and creative tourism to the European regions, thus contributing to revitalisation of urban and rural areas (KEA and PPMI 2019: 60).

There is an implicit recognition that "in the near future the CCS will be able to adapt well to changing economic environments. It is also likely that the CCS will play even a greater role in developing regional strategies to increase attractiveness of urban and rural areas for tourism and investment" (KEA and PPMI 2019: 60).

Conclusions

There is a growing recognition of the importance of tourism and culture interconnections in sustainable development. This "interconnectivity" and desirable "symbiotic" relationship should form the base of cultural and creative tourism destinations' socio-economic development.

In Europe, due to its richness in cultural and creative resources, cultural and creative tourism is recognised as an opportunity to enhance this region's cultural heritage identity and shared authentic values and promote Europe as a "unique tourism destination". Therefore, European tourism and culture policies have a role to play in developing culture and heritage tourism products, not only because they have cultural, symbolic, social, and economic intrinsic value, but also due to their economic and social impacts. It is recognised that they potentiate the conservation and protection of natural and cultural resources, the awareness of tourists and host communities, regional GDP and multiplier effects, and respect for carrying capacities, stakeholders, partnerships, among other aspects.

The Europe 2020 and Europe 2027 programmes enhance Europe's strategy – sustainable, intelligent and inclusive, in accordance with the sustainable development goals of the 2030 Agenda.

In the context of tourism policy, cultural routes, funds for cultural tourism projects, EDEN Prizes, and ETIS, should be highlighted.

Once culture is seen as the fourth dimension of sustainability as well as a driver and enabler of development, documents such as the "European Agenda for Culture and the New European Agenda for Culture" realised through a new Council Work Plan for Culture (2019–2022) and the "Creative Europe Programme" should be considered as key instruments in the framework of European Cultural policy, once they foster the reinforcement of the competitiveness of the cultural and creative sectors and its linkages to tourism sector.

Among "Special actions", some initiatives are considered consistent with cultural tourism enhancement, namely, the European Year of Cultural Heritage 2018, European Heritage Days, European Capitals of Culture, the European Heritage Label, and the European Union Prize for Cultural Heritage/Europa Nostra Awards, among others.

Additionally, the European Cultural Heritage Strategy for the 21st century is highlighted in its three components: "social", "territorial and economic development" and "knowledge and education". These "components" interact in areas of convergence aiming at the right balance between the various components and their areas of convergence.

Many authors highlight the challenges of European Tourism policy, especially those associated with the need and improvement of coordination of sustainable tourism activities of a large group of stakeholders, particularly at the EC's inter-governmental level. Better interconnection between "institutionalisation" and EU institutions' "legitimacy" is also demonstrated. "Aspirational scenarios" are considered, namely the ones that illustrate the CCS activities' high potential for becoming a factor of cultural tourism's attractiveness and thus contributing to the revitalisation of urban and rural areas. In this framework, and regarding the interconnection of tourism and cultural heritage, the challenges are greater once cultural domain is not something that is fixed in time and space. It has different dynamics associated with different social actors and contexts.

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Chapter Ten

Identifying Students' Preferences to Design Pleasant Learning Environments

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Introduction

Education as a fundamental human right is a key factor in the development of individuals and societies. As Pavel (2012) concludes, judgment of the importance of higher education can be achieved through the ways that benefit the individual emotionally, socially, financially and intellectually. Bhardwaj (2016) believes that education, in addition to providing a platform for success, equally gives us knowledge of social conduct, strength, character, and self-respect. Universities and higher education institutions have a constant endeavour for modern and well-equipped learning environments conceptualised as impactful in pursuit of more attraction and student retention. Creating an educational space within which students can directly engage class and session presentations visually in a noise-free environment is one of the most considerable requirements during the design process of learning environments, as one of the students' fundamental rights (Clabaugh 2000). But according to hedonomics, as Hancock, Pepe and Murphy (2005: 8) claimed, "once individual users' safety and functionality needs are satisfied, pleasure should be considered in the design of products, systems, tools, and environments".

Within importance directives and the provision of educational services, the quality of the learning environment acts as a learning stimulus and facilitator. It is commonly agreed that the learning environment, described as conditions within which learning takes place, profoundly affects students' academic achievements (Malik and Rizvi 2018; Suleman and Hussain 2014) and their satisfaction during the course (Han, Kiatkawsin, Kim and Hong 2018). Direct attachment to emotions and pleasure motives make the promise of significant impacts on results look tangible, as this should be achieved through an environment designed specifically to enhance students' learning experiences.

Despite the proven impact of the learning environment, researchers have not paid enough attention to learning environments, especially in higher education (Temple 2008). Although hedonomics are concerned with the promotion of perceived pleasure (Hancock et al. 2005), a deeper comprehensive and sensitive measurement of happiness and pleasure is among the most difficult challenges of hedonomics research (Hsee, Hastie, and Chen 2008).

This research aims to identify the attributes of pleasant learning environments and to measure higher education student priorities. Focusing on the identification of general issues in ergonomics and the boundaries created by standards regarding facilities and necessary equipment, without consideration for quality parameters, asserts the necessity of research on emotional and pleasure aspects. The main issue addressed in this research is improving the quality of learning environments in higher education. The authors believe that it is necessary for students, especially industrial design students as the design responsibility bearers of the future, to create a pleasant and enjoyable environment for positive, active and practical learning. For this purpose, the practical classes of undergraduate students in Industrial Design at the University of Science and Technology of Iran have been sampled in the current study.

Literature Review

One of main objectives of education as a service is learning as an experience. Facilitating deep experiential learning will occur dedicatedly in caring and prepared environments with respect to the learners' goals (Kolb and Kolb 2005). Ng and Forbes (2009) explain that the learning experience is a hedonic process, and there are pleasure and adventure factors involved when students are occupied by learning in which emotions play a significant role. Hu et al. (2007: 160) point out that "heightened states of emotion can facilitate learning and memory formation".

In most scholarly works on the learning environment, general standards and physical facilities have been proposed based on the constructs of ergonomics. The effects of the physical classroom environment on academic achievement scores are examined by Suleman and Hussain (2014), while the ergonomic factors regarding seating arrangements and sitting furniture in the classrooms have also been studied by a few scholars (i.e. Jayaratne and Fernando 2009; Khanam, Reddy, and Mrunalini 2006). Smith (2007) tries to answer the question of how ergonomic design influences learning performance. Ergonomic-oriented classroom furniture (Oyewole, Haight, and Freivalds 2010), the necessary anthropometric measurements of classroom furniture (Tunay and Melemez 2008), the mismatch between classroom furniture dimensions and anthropometric dimensions of students (Dianat et al. 2013; Ghazilla et al. 2010), and the measures of chairs and desks (Saarni, Nygård, and Kaukiainen 2007) are research topics that address this subject with more focus on ergonomics in comparison to hedonomics, in a holistic view. Some researchers, like Legg and Jacobs (2008), have also tried to introduce a new direction by introducing the concept of educational ergonomics.

Despite a slim body of research investigating the design aspects of educational environments such as higher education services facilities (Sapri, Kaka, and Finch 2009) – including the positive impact of design on student performance (Smith 2012), the impact of classroom attributes on student satisfaction and performance (Yang, Becerik-Gerber, and Mino 2013), and students' dreams of a perfect learning environment (Kahl 2014) – it is barely possible to find exploratory research items with expressive efforts on the design factors conducive to a pleasant learning environment in higher education. However, there has recently been a rapid growth of research on emotion and pleasure and their effects (Oron-Gilad and Hancock 2005). The user's satisfaction and emotion, which were formerly judged and understood as subjective concepts, are now being reconstructed with objective data produced by researchers such as Peter Hancock under the umbrella term hedonomics. Hancock et al. (2005: 8) defined hedonomics as "the branch of science and design devoted to the promotion of pleasurable human-technology interaction" and the facilitation of the pleasant and enjoyable aspects of this interaction.

Hedonomics studies the relationship between presentations and happiness and the relationship between choice and happiness (Hsee et al. 2008: 224). Hedonomics also helps designers to develop new and efficient processes, which contribute to more effective and favourable service or product offerings (Naeini and Mostowfi 2015). Helander and Tham (2003) introduce hedonomics as a new discipline which is not about how to evaluate the user, but instead consists of how the user evaluates. Although there are articles with direct concerns for hedonomics (i.e. Hancock et al. 2005; Helander 2002; Hsee et al. 2008; Murphy, Smith, and Hancock 2008), "the formal history of a science of hedonomics is a relatively short one" (Oron-Gilad and Hancock 2017: 187). On this basis, there are more frameworks, methods, and approaches required to be used in empirical studies, especially in environmental design.

Naeini and Mostowfi (2015) claimed that knowledge of hedonomics is necessary to create pleasurable and enjoyable experiences. Consequently, through current research, by considering "pleasure" as one of the main concepts in hedonomics, it is pursued to identify students' preferences on pleasure during learning environment attendance.

In this regard, a hierarchy of ergonomics and hedonomics needs derived from Maslow's (1970) model to establish hedonomics as a field of study (Hancock et al. 2005) is implemented by this research (Figure 10-1). From this perspective, Oron-Gilad and Hancock (2017: 189) believed that "a simple usability approach is unlikely to succeed".

After achieving functionality and usability in a system, it is time to design and fulfil users' psychological and sociological needs, such as their intentions to belong, desire to achieve, preference to be competent and independent, and finally the natural tendency for interactions to become pleasurable experiences (Hancock et al. 2005).

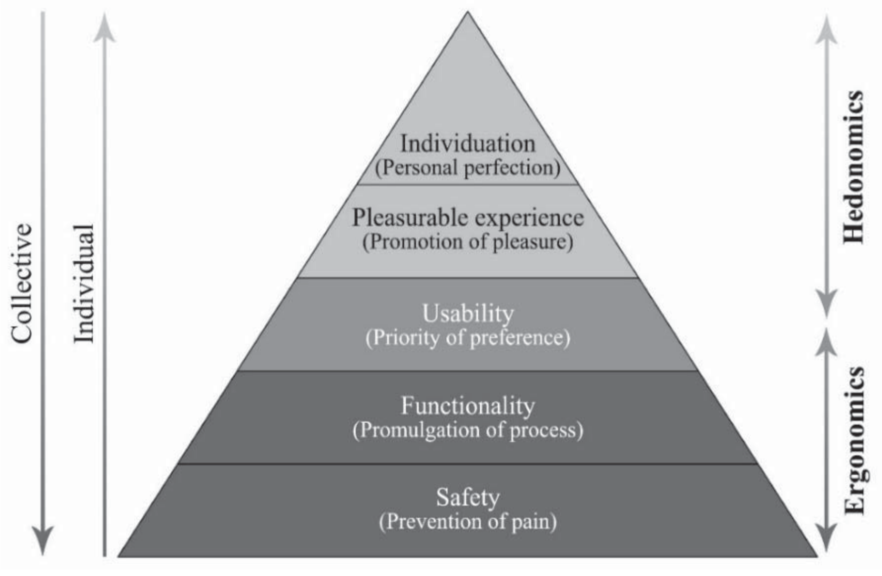

Figure 10-1 Hierarchy of Ergonomics and Hedonomics
Source: Hancock et al. 2005

The pleasure and individuation segments in the hierarchy of ergonomics and hedonomics are separately very intricate and extensive subjects. This study focuses solely on the topic of pleasure due to its significant role in the area of hedonomics. Moreover, the novelty of hedonomics makes this area of research underrepresented which necessitates gaining a more concise and deeper understanding of pleasure.

Methodology

The purpose of this qualitative research is to determine the main attributes of pleasant learning environments. Designing a pleasant learning environment, therefore, can be considered the main objective. Secondary objectives include topics identifying pleasure achievement in environmental design and the role of emotions in perception of the environment. According to the curriculum of industrial design conduct in Iran, the combined numbers of units in this field total 135, of which 48 (35.5%) are categorised under practical courses (non-workshop), and out of 2856 total academic hours, 1326 hours (46.6%) are devoted to these courses. Since students spend about half of their time in this environment, and considering that design principles should be best implemented in such learning environments, in this study, the learning environment for practical courses for undergraduate students of Industrial Design at the University of Science and Technology of Iran (IUST) has been examined.

Research data were collected through interviews and questionnaires, in addition to reviewing written sources and scholarly works. To identify students' preferences in order to design a pleasant learning environment, data collection is structured in two phases: first, to define pleasure aspects and secondly, to identify preferences.

Phase 1: Definition of pleasure in attending a learning environment from students' point of view.

During the first phase, 17 interviews were conducted with industrial design students (at IUST) about attributes to define pleasure coming from attending a learning environment. Simple random sampling was implemented at this stage to ensure each student had an equal probability of being chosen. The objective was to determine students' opinions regarding the most desirable attributes affecting pleasure. Primary phase findings shed light on a vast variety of exhibited features and diverse preference factors. These features were categorised into three categories: amenities, communication, and emotions.

Phase 2: Identification of constituent attributes and features of a pleasant learning environment.

Since hedonomics was considered as the preferred theoretical framework for this research, the discussion of physiological characteristics related to ergonomics and anthropometrics were unattended in the second phase.

Because of the broadness of individuation, this item has been omitted as well. A questionnaire including 30 questions on a five-point Likert scale (with an acceptable Cronbach's alpha of greater than 0.7), has been developed as a means of the survey of current research.

The questionnaire scoring system was developed based on the most frequent preferences regarding amenities, emotions, and communications. After the initial application of a pilot group of six, a second group of 25 industrial design students at IUST (17 females and 8 males, aged between 20 and 25 years) was chosen to be presented with the questionnaire. The objective was to identify attributes and associated options for a pleasant learning environment. Particular attribute options were obtained by frequency counting, applied using three options for each attribute. The results of the questionnaire, defining the most effective options for each attribute, were obtained by the calculation of the correlation coefficient on each item (as presented in Table 10-1).

This research follows conjoint analysis to determine students' preferences for a pleasant learning environment based on three particular attributes, including emotions, amenities, and communication. Conjoint analysis as a technique to analyse survey responses concerning preferences represents a method of simulating how consumers might react to changes (Green, Krieger, and Wind 2001). It is a multivariate technique, which utilises the implications and combination of several variables, in this case, attributes and associated options. The conjoint analysis generated nine combinations, which were ultimately presented as card combinations to 20 industrial design students, to sort them according to their preferences.

Results

Phase 1 was conducted to investigate a definition of pleasure in attending a learning environment from the students' points of view. Interviewees were asked to define the most desirable attributes effecting the pleasure of attending a learning environment. Yielded results demonstrated specific various features, categorised into amenities, communication, and emotions, as presented in Table 10-1.

Table 10-1 Results of Interviews - Describing the Attributes of a Pleasant Learning Environment

Amenities	**Emotions**	**Communications**
1. Big windows 2. Enough space to put personal belongings 3. Cleaning supplies 4. Suitable board 5. Facility to take a drink 6. Comfortable chair with backrest 7. Ventilation 8. Environmental temperature control 9. Absence of polished materials and surfaces (problems with light reflection) 10. Separation of classes for theoretical and practical courses (Special classes for different courses) 11. Internet connection and charging facilities	1. Natural light 2. High ceiling 3. Music 4. Decorative objects 5. Wood texture 6. Chromatic colours for the furniture and environment 7. Diversity of form in the design of environment and furniture 8. Special permanent classes for students of different academic years 9. Adding equipment to the environment by students, according to their interests and tastes 10. Specific space for each individual	1. Related resources, books and images 2. Students' work presentation related to the course 3. Possibility to sit in different positions 4. Group furniture arrangement for more interactions 5. Possibility to move the furniture and change the arrangement according to the activity 6. Connection with the teachers 7. Displacement and mobility

Source: Own Elaboration

Throughout Phase 2, the prepared questionnaire was then restricted to three attributes with three options per attribute, to investigate students' preferences regarding a pleasant learning environment. The questionnaire has been developed based on common features of amenities, emotions, and communications. Table 10-2 illustrates the correlation coefficient of each feature option found by this research:

Table 10-2 Results of Questionnaire – The Most Affective Options for Each Attribute

Attributes	**Options**	**r**
Emotions	Music (Playing light music)	0.90
	Chromatic Colours (Using chromatic colours for the furniture and environment)	0.89
	Decorative Objects (Adding decorative items, such as plants, artworks, statutes, etc.)	0.85
Amenities	Charging facilities and internet connection (Using electronic devices easily)	0.92
	Facilities to take drinks (Preparing hot and cold drinks)	0.87
	Related resources (Possessing books and articles, sample works, Encyclopedia, etc.)	0.70
Communications	Connection with teachers (Connecting with the teachers comfortably)	0.90
	Displacement and Mobility (Being able to walk and not sitting for a long time)	0.88
	Furniture arrangement (Arranging furniture for interaction)	0.76

Source: Own Study

The conjoint analysis system generated nine cards with combinations of three attributes on three levels (Table 10-3).

Table 10-3 Card ID Generated by Conjoint Analysis System

Card ID	Emotions	Amenities	Communications
1	Music	Facilities to take drinks	Connection with teachers
2	Chromatic colours	Charging facilities and internet	Displacement and Mobility
3	Music	Related resources	Displacement and Mobility
4	Chromatic colours	Facilities to take drinks	Furniture arrangement
5	Decorative objects	Facilities to take drinks	Displacement and Mobility
6	Music	Charging facilities and internet	Furniture arrangement
7	Decorative objects	Charging facilities and internet	Connection with teachers
8	Decorative objects	Related resources	Furniture arrangement
9	Chromatic colours	Related resources	Connection with teachers

Source: Own Study

In the final stage, these card combinations were presented to 20 industrial design students to be sorted according to their preferences. The result (Table 10-4) shows that emotions and amenities, although slightly different, are more important than communications as a factor.

Table 10-4 Averaged Importance Score

EMOTIONS	35.354
AMENITIES	35.025
COMMUNICATIONS	29.620

Source: Own Study

Based on the overall statistics (Table 10-5 and 10-6), having light music remains the most desirable option among the preferred emotional attributes. Related resources (e.g. books, articles, sample works or encyclopedias) and availability of beverages are the second and third priorities, respectively, categorised under amenities. In communication attributes, connection comfort with teachers has been proven even more essential than interactive furniture arrangements for students.

Table 10-5 Total Utility Value

Cards	**Total utility value**
CARD 1	5.75
CARD 9	5.683
CARD 8	5.599
CARD 4	5.417
CARD 3	5.316
CARD 5	4.933
CARD 6	4.383
CARD 7	4.266
CARD 2	3.65

Source: Own Study

Table 10-6 Overall Statistics

Attributes and Options		**Utility Estimate**	**Std. Error**
Emotions	Music	.150	.142
	Chromatic Colours	-.083	.142
	Decorative Objects	-.067	.142
Amenities	Charging facilities and internet connection	-.900	.142
	Facilities to take drinks	.367	.142
	Related resources	.533	.142
Communications	Connection with teachers	.233	.142
	Displacement and Mobility	-.367	.142
	Furniture arrangement	.133	.142

Source: Own Study

It can be deduced that for emotional options, as the most prioritised factor, students tend to listen to music while practicing. Having access to related resources and facilities to prepare hot or cold drinks were more important amenities than charging facilities and internet connection. In communications, students prefer to connect comfortably with their teachers and have desirable interactions through effective furniture arrangement. The summary of utilities on emotions, amenities and communications is shown in Figures 10-2 and 10-3.

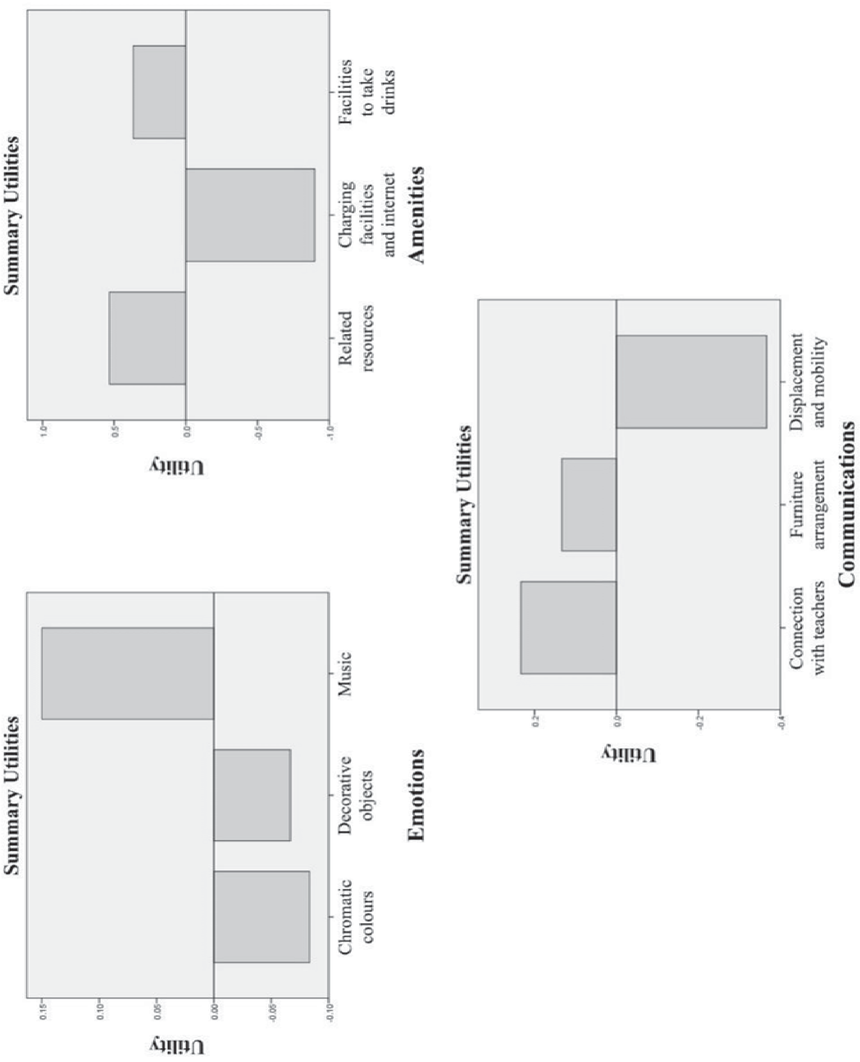

Figure 10-2 Summary of Utilities
Source: Own Study

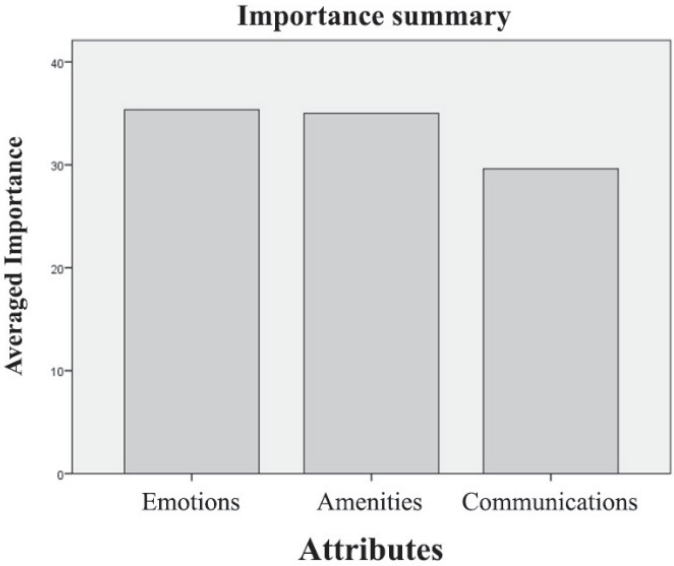

Figure 10-3 Importance Summary
Source: Own Study

The overall impression of results suggests that students find a less formal environment more pleasant. Therefore, to improve the quality of the higher education learning environment and to create a pleasant environment for practical courses in industrial design discipline, it is recommended to apply attributes appropriate to the taste and behaviour of the students to induce their comfort and freedom.

Conclusion

In recent years, much attention has been drawn to emotion and pleasure as concepts, but their impact, especially on environmental design, requires more empirical research work. It is also worth mentioning that, despite the focus of hedonomics on the positive impacts of design on the user (Naeini and Mostowfi 2015), these impacts are not only confined to product design. In this regard, this research is one of only a few studies dedicated to the investigation of hedonomics in environmental design. The results indicate that for a pleasant learning environment, emotion is first priority, while amenities and communications are second and third priorities respectively, according to industrial design students' surveyed preferences. It came to light that some modest changes, such as playing light music, facilities for comfort (e.g. preparing drinks) and access to resources, as well as comfortable communication, interactive furniture arrangement and connection comfort, in compound, can provide a pleasant learning environment.

While this study considered industrial design students as sample set members, students in other fields are considered possible avenues of investigation for future studies. Likewise, the relationship between various factors, such as age, gender and timescale of education, with the pleasure of learning in environmental design are also eligible to be studied further and more thoroughly. Comparison between the initial interviews and estimated preferences additionally provides a background for further research on the findings, which denote that students have a pleasant experience in a learning environment in which they feel "comfortable" and "free".

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