

EXPLORING THE DESTINATION BRANDING EFFECTIVENESS: SOME PRELIMINARY EVIDENCE

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ABSTRACT

Tourism destinations continuously compete against each other for share of mind, share of income, and share of voice. However, only some of them manage to score high at the tourism performance indices, while others fail to attract the desired tourists' attention. This study aims to investigate destination branding effectiveness through the lens of a comparative case study approach. On the basis of a branding strategy framework for destinations, the authors trace the differences in brand planning and management. Findings suggest that a successful destination brand strategy is a precondition for DMOs to carry out contingent activities, leading to better and long-lasting results.

Key Words: destination branding, branding effectiveness, DMO, case-study

INTRODUCTION

Turbulence in macroeconomic environment largely affects tourism industry, among other sectors, and increasing competition becomes the key-characteristic of the global tourism market. In this setting, destinations' ability to compete against each other, is significantly determined by the power of their brand image (Anholt, 2004). Tourism destinations are increasingly being recognized in the context of a brand (Lee, 2001). Unless a destination "stands for" something special and different, there is little chance that this destination will be able to compete successfully for any of the precious attention. This is probably the reason why some destinations rank at the top of the relevant tourism performance indices, while others fail to attract adequate tourists' attention.

Like any brand, destinations have individual identities which are unique unto themselves (Jaworski & Foshier, 2003); no two destinations are alike. Based on their unique identities, many destinations have been branding themselves deliberately and systematically for centuries, even if the respective vocabulary has only recently been adopted. Hence, the notion of brand management for destinations has been established as one of the key tools for attaining world-wide competitiveness.

Defining destinations at a national level, the main purpose of this study is to investigate the root causes of destination branding long-term success as well as the factors causing the lack of destination branding effectiveness over time. For this purpose, two case studies are compared and analyzed, notably, France and Greece, which exhibit different levels of destination brand performance in terms of inbound tourism activity (UNWTO, 2011a). Secondary data were collected from the two National Tourism Organizations, as well as primary data from interviews held with two (2) tourism executives (tourism attaché for the case of France and destination branding policy maker for the case of Greece). The branding efforts of the two destinations are outlined and compared against the branding imperatives suggested by the relevant literature. Such an analysis is relevant, as the differences in the destination branding approaches revealed, confirm the fact that the adoption and implementation of winning destination brand strategies yields better and long-lasting results. Against this background, we frame our argumentation within what is referred to as destination branding theory, based on a comprehensive framework for tourism policy-makers to build upon. The article concludes with a discussion of implications for destination brand strategists and an agenda of topics regarding destination branding that call for future research efforts.

LITERATURE REVIEW

"While the concept of destination image has dominated the literature, the concept of destination branding is a recent introduction" as Gartner and Ruzzier recently mentioned (2011:47). On the grounds that the battle for customers in the tourism industry will be fought not over price but over the hearts and minds, destination branding will be the key to success (Morgan and Pitchard, 2000). Based on Richie and Richie (1998), later work made by Blain et al. (2005:337) led to the definition of destination branding as "the set of marketing activities that (1) support the creation of a name, symbol, logo, word, mark or other graphic that readily identifies and differentiates a destination; (2) consistently convey the expectation of a memorable travel experience that is uniquely associated with the destination; (3) serve to consolidate and reinforce the emotional connection between the visitor and the destination; and (4) reduce consumer search costs and perceived risk". The intent purpose of these marketing activities is to create an image that influences consumers' decisions to visit the destination in question, as opposed to an alternative one.

Unlike many scientific contributions in the field of product brands, the research line of tourism destination brands is still in its infancy (Hosany et al., 2006; Park & Petrick, 2006). The question remains as to whether already accepted branding principles can be transferred to destinations. Increasingly, there is a general agreement among academics and practitioners that destinations can be branded in much the same way as consumer goods and services (e.g. Kotler & Gertner, 2002; Papadopoulos & Heslop, 2002). Despite earlier skepticism, the concept has recently attracted the interest of academics and practitioners (e.g. Cai, 2002; Kerr, 2006). The interest around the subject yet remains limited, as efforts applied to the destination marketing field constitute a knowledge-intensive and exceptionally complicated task (Singh & Hu, 2008). The complexity is attributed to the myriad of products, services and experiences, which are all managed, distributed and 'consumed' by different stakeholders (hoteliers, travel agents, tour operators, transportation companies, local authorities and residents, destination management organizations, tourists etc.), with a variety of ownership forms and often without an appropriate hierarchy or set of rules for stakeholders to adhere to (Konecnik & Go, 2008; Konecnik, 2002).

To date, the vast majority of tourism destination studies have addressed and examined the brand concept primarily from a demand-side perspective, adopting a consumer-perceived-image approach (e.g. Echtner & Ritchie, 1993; Baloglu & McCleary, 1999; Anholt, 2005). In contrast, only some years ago did researchers advocate the importance of a supply-side managerial perspective on tourism destination branding (e.g. Cai, 2002; Hankinson, 2007; Blain et al., 2005; Balakrishnan, 2008; 2009; Piha et al., 2010).

Apart from those efforts that particularly deal with Destination Branding, important insights can and should be retrieved by the work of top academics in the branding field that focus their research on brand building and the development and maintenance of strong brands, without however focusing their work on destinations (e.g. Doyle, 1989; Aaker, 1996; Davis et al., 2003; Keller, 2008).

In this context, a former research work undertaken by Piha et al. (2010) uncovered several common elements that seem to characterize all strong destination brands, leading to the development of a solid framework of seven branding activities for creating and maintaining successful destination brands over time (Figure 1). As shown in the figure, during the stage of “Destination Brand Development”, three steps are important and necessary for the formation of a successful destination brand. A *Brand Analysis*, which refers to the development of a thorough knowledge regarding tourists’ brand needs, competitive brand offerings and

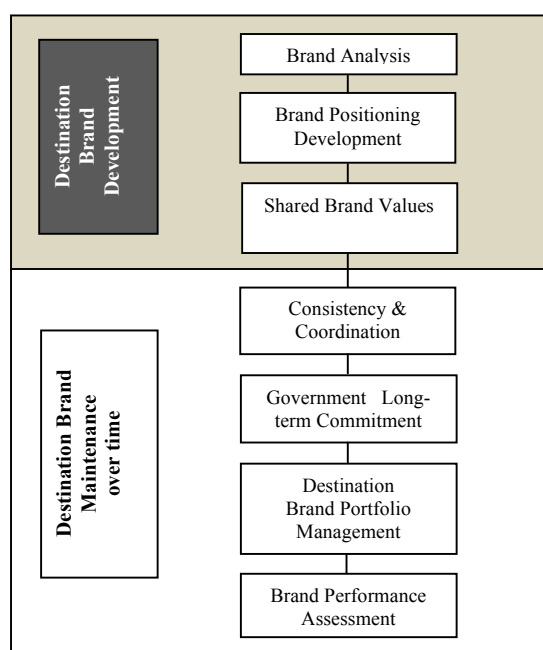


Figure 1: Destination Branding Framework

internal brand destination capabilities, is first needed. The *Brand Positioning Development* is in order, which clarifies the destination’s unique brand identity and selects a brand positioning that successfully reflects the part of the brand identity that is to be actively communicated to the target audience, creating key brand associations in the minds of tourists and other important stakeholders that differentiate the destination brand in a meaningful way. What follows is the effective communication of the destination brand positioning to all internal stakeholders, namely *Shared Brand Values*, in order to create a common understanding of the destination brand values, form positive beliefs and attitudes towards the brand and facilitate the proper delivery of the brand promise to tourists and visitors. After a destination brand is successfully developed, it must be maintained and enhanced over time (“Destination Brand Maintenance over time”) through a *Continuous Coordination of marketing activities* in order for the essence of the destination brand to remain consistent across all tourist contact points. A *Government Long term Commitment* is also needed to support the development and infusion of the destination brand values across multiple stakeholders, in order to generate an ongoing commitment of all people to the destination brand, encourage brand supportive behavior and support the necessary consistency mentioned earlier. A proper *Destination Brand Portfolio Management* is also essential, representing the necessity of successfully managing the multiple different “product” brands of a destination, in such a way that synergies are fostered, brand assets are leveraged, tourism market relevance is maintained and confusion of the destination brand to tourists’ minds is avoided. Finally, a *periodical monitoring of Brand Performance* through tourist and internal based research should take place, in order to identify gaps between tourist and locals perceptions regarding the destination brand and consequently refine, if necessary, the branding efforts.

The above model is used as a conceptual framework for the present study. More specifically, adopting the branding imperatives suggested by the model, the authors try to identify the extent to which these brand-related activities are implemented by two destination cases which exhibit different levels of tourism competitiveness. The results of such analysis will be hopefully illuminating regarding the way a destination can build and maintain a successful brand over time.

METHODOLOGY

For the purpose of the study, the authors adopted the comparative case study approach (Yin, 1994). In accordance with the research design, several sources of information were utilized to reinforce research validity,

with particular emphasis on the in-depth interviews with the tourism executives. For these interviews, a discussion guide with questions related with each of the seven blocks of the model under investigation was used. The insights gained from the interviews were combined with secondary data from annual reports and the publicly accessed official national tourism websites. The interviewees were carefully selected to reassure that the planned interviews would be undertaken with the most informed and best positioned (Harris, 2002).

France and Greece were selected as comparable, based on two principal axes, one pertaining to aspects they have to share in common and one they differentiate in, notably: a) geographical closeness and morphological similarity, regarding mainly their Mediterranean characteristics, b) differences in their performance over time, although both at the top 20 tourism destinations worldwide. More precisely, analyzing the published “facts and figures” for international tourism inbound activity provided by the World Tourism Organization (2011a,b), France is the global tourism leader moving up to the highest positions of tourism competitiveness worldwide (World Economic Forum, 2011), whereas Greece has not shown similar signs of performance.

THE CASE OF FRANCE

Acknowledging the importance of destination branding as a way of gaining world-wide competitive advantage, France has successfully developed its destination brand. More specifically, its destination branding process begins with a deep understanding of the strengths and limitations of France, as these are set by its history, its culture, as well as its geographical and morphological settings. Its cultural predominance, particular gastronomy, architecture and infrastructure are acknowledged among its competitive advantages. In a subsequent step, the strengths and weaknesses of the destination’s direct competitors are considered. Spain and Italy are perceived by French tourism executives as direct competitive destinations, given the similarities in the overall tourism product offered. By observing specific success stories of those countries but also their branding mistakes through the years, France is gathering useful information for the development of its own branding strategy. Finally, important insights for the successful destination brand development of France is gained through primary tourist research, feedback by international expositions, as well as tour operators who have a well defined knowledge regarding tourist’s brand needs. Based on a thorough tourist, competitor and self-analysis, France is in a solid position to clarify its unique brand identity, namely what France “stands for”, providing direction and purpose for the future. The brand values of France as a tourism destination are clear: “*Quality, Cultural and Gastronomical superiority, Romance and Passion, Independence and Hospitality*”, as it was clearly mentioned in the interview. Based on these clearly defined brand values, the **brand positioning** of France aims at actively communicating to the target audiences that France, for all these reasons, is a place that someone not only should, but also must visit at least once in a lifetime. The recently developed logo “*rendezvousenfrance*” is in accordance with the destination’s values, as it promises to tourists a date with all French distinct features. France is, therefore, differentiated in tourist’s mind in a meaningful way, as the destination brand positioning developed is close to reality, believable, simple, appealing and distinctive. Most importantly, the brand positioning developed is effectively communicated to the different tourism stakeholders inside France, as well as to travel agents in other countries, and, therefore, the destination **brand values are successfully shared** among all internal stakeholders (e.g. accommodation suppliers, tour operators, local authorities). As a result, the local community, as well as the private and public sector, have agreed with, subscribed to, and enacted the destination’s vision of what it is, what it stands for, and where it is going. As the French tourism attaché stressed, “*Serving tourists with an excellent level of quality is now part of French people’s DNA*”.

France, as a tourism destination brand is also effectively protected ever time. The logo of France was replaced after 11 years, showing that **brand consistency** is safeguarded by French destination brand strategists. With the newly developed logo (*rendezvousenfrance*) France aims at creating a unified image to the target audiences by associating the country with an imaginary or potential date with French gastronomy, culture, romance and hospitality, either if these are expressed through a particular place (e.g. Paris, Mont-Saint-Michel, French Riviera) or a special event (e.g. Cannes film festival). The same brand image is consistently delivered through all marketing activities of France (e.g. tv advertisements, expositions, brochures). In addition, ISO control systems continuously monitor that the desired level of quality is offered to tourists and a complaint management system is permanently in place so as to make sure that immediate solution is given to every problem and the tourist always receives what the destination brand promises.

All the above are accomplished through a continuous protection of the French brand equity. Following a decentralized decision-making process, the **French government** (Ministry for the Economy, Industry and Employment, also responsible for Tourism in close cooperation with the France Tourism Development Agency)

is committed to supporting all branding efforts and safeguarding the proper implementation of the branding strategy. It is worth stating that the French government constantly promotes the cooperation of the public with the private sector, in order for a unified destination brand image to be delivered to the target audiences. Moreover, the government ensures that adequate financial support is provided to the different French regions, so that the different “product” brands are sufficiently supported. Each French region is given a large amount of money each year to promote its tourism competitive advantages internationally. Local tourism authorities in each region are responsible for spending the financial resources provided by the government, as they are free to decide the means by which their region will be promoted, as well as the content of the promotional strategy. However, French government verifies that all regional branding strategies promote the respective regional competitive advantages and are consistent with the destination brand “umbrella”. For example, in the case of a particular region, a slogan such as “*Rendezvous en Alsace*” is used, whereas in the case of an important event, a slogan such as “*Rendezvous au Festival de Cannes*” is promoted. As a result, the French **destination brand portfolio** is properly managed. Finally, specific goals are set by French destination brand strategists regarding the future, as they have clearly quantified the desirable increase in arrivals, receipts and new jobs created by tourism increase by 2020 (i.e. project “*Destination France 2020*”). For this purpose, continuous research is conducted in order to **assess** whether **the branding efforts** accomplish their goals. Market research is also used to investigate the branding needs and desires of the targeted markets, so as to refine if needed the branding strategy and attract target tourists more effectively.

THE CASE OF GREECE

In order to develop the destination’s brand strategy, responsible authorities for destination brand building in Greece conducted a thorough research in travel agents, tour operators, and tourists, as part of the project “*Marketing Plan for the Greek Tourism 2007-2012*”. This research resulted in a detailed SWOT **brand analysis**, which revealed tourism trends, as well as the strengths and weaknesses of the competitive countries (e.g. Turkey, Italy, Spain, and Tunisia). Greek destination brand diversity was unveiled through the study. More specifically, the brand values of Greece, according to the tourism attaché interviewed, include among other security, authenticity, sincerity, warmth, pride, energy, joy, and spontaneity. It is evident that the brand values of Greece appear to be fragmented, failing to draw a unified destination brand image for the country. This has a direct effect on the **brand positioning** selected which aims at associating Greece in tourists’ minds as “*a destination offering unique antitheses and a great variety of experiences*”, as it was characteristically stated. Such positioning is rather vague and does not send a clear, easily communicated destination brand message that specifies in a meaningful way the competitive advantages the country possesses. The positioning selected probably reflects an effort to put under the same umbrella all distinct Greek tourist offerings, albeit the unique character of the experiences and the various tourist-locals touch points. However, from a branding standpoint, it may fail to create key brand associations in the minds of the target tourists, as it does not focus on a single and clear brand promise. The competitive advantages of Greece, such as its culture and heritage (i.e. western civilization) and its physiography/climate (morphological diversity and Mediterranean climate), may fade under a host of different brand values and a vague brand positioning. It is not accidental that the Greek destination brand strategy focuses the last years in promoting simultaneously different forms of tourism, and in particular, the seaside, cultural, nautical, touring, city break, nature, wellness, meeting, and luxury tourism. This is the way Greece intends to **manage its brand portfolio** which comprises of distinct tourism offerings. However, without a carefully planned integrated branding program that would promote the different offerings under a coherent brand message, the goal of successfully promoting all the above different types of tourism is difficult to be accomplished.

It is also worth noticing that the destination brand logo and tourism slogan of Greece has been changing almost every two to three years. Such a frequent change implies a corresponding periodic change in the respective brand positioning, as the logo and the slogan reflect what a destination actually wants to communicate to the tourists’ mind, namely its brand positioning. For example, in the last decade, the following slogans were used to diffuse the image of destination Greece worldwide: “*Live your myth in Greece*” (2005), “*Wonderful Greece*” (2006), “*Explore your senses*” (2007), “*The True Experience*” (2008), “*A Masterpiece you can afford*” (2009), “*Kalimera*” (2010) and “*You in Greece*” (2011). Such a variety of brand messages in a limited period of time is very difficult to create the desired **brand consistency** for a successful brand building and management. As a result, the **assimilation of the desired brand values** by both the target markets and all internal stakeholders becomes rather complicated.

The promotional activities of Greece as a tourism destination include annual participation in several international expositions, co-advertising with tour operators, outdoor advertisements, familiarization trips of

journalists, TV and on-line advertisements and social media exploitation. However, given the variety of the branding messages already discussed, the effectiveness of all aforementioned promotional activities can still be questioned. An additional difficulty that characterizes the Greek branding efforts nowadays is the limited financial resources provided by the government to the country's destination branding efforts. It should be stated, though, that before the economic recession the amount of money provided by the state to the Greek tourism branding and promotional efforts was much larger, in absolute numbers. However, Greece did not score higher in the relevant tourism performance indices, implying that other branding aspects like brand clarity and consistency, rather than financial resources, may play a more vital role to branding success. Concerning the **government commitment** to the country's tourism branding effort, it is interpreted in budgetary decisions; complaint handling (as in the case of France) is not provided. Apart from the official procedures (signs attributed to accommodation suppliers etc.), no other form of governmental monitoring and surveillance or provisional activities takes place, a fact that potentially affects negatively the management of the destination branding over time.

Annually, Greece sets quantitative goals regarding the desired international tourist arrivals and receipts for the next year. However, such a short-term planning is possible to impede the necessary long-term view in destination branding. After all, branding sets as a prerequisite a long-term strategy, the results of which should be expected in the long run. Finally, it should be stated that the strategic brand planning developed by Greece (i.e. period 2007 – 2012) acts as a static snapshot of the Greek tourism destination brand, and it has yet to be updated (i.e. constant **monitoring of brand efforts**, destination brand effectiveness). As such, Greek tourism authorities cannot have at their disposal the necessary information in order to trace possible weaknesses of the branding activities and, therefore, refine their strategy.

CONCLUSIONS

Based on the preceding analysis, it is evident that the destination brand strategy of the two countries analyzed differs significantly. On one hand, France shows a well-defined brand identity, a clear and differentiated brand positioning and a carefully planned destination branding strategy that is consistent through the years and receives the support of all internal stakeholders. As a result, it is expected that France may be able to exploit its resources, take advantage of the distinct features it can offer and score continuously high at the top of the international tourism arrivals and tourism income rankings. On the other hand, Greece could rather be considered as a free-floating signifier situation with perpetual modification of positioning strategies, without having clarified yet how the brand Greece will be effectively differentiated in visitors' minds. Greece is undoubtedly characterized by unique cultural and morphological settings. This is probably the reason why, although not adequately supported through branding, the country scores constantly at the top 20 of tourism destinations (inbound activity). However, given the example of France, one can imagine the great possibilities offered to such a country as Greece for tourism excellence, based on a more consistent adoption of a successful destination branding strategy.

The empirical findings of the research unveil critical aspects of the destination branding model developed earlier by Piha et al. (2010). It can be concluded that the successful case of France adopts all destination branding imperatives suggested by the model, which yield significantly positive results in terms of tourism destination performance (e.g. number of tourists etc.). On the contrary, the case of Greece shows that a possible diversion from the suggested strategy (without consistency or with inappropriate activities etc.) constitutes a route of high risk.

NTOs and DMOs may benefit from the supply-side managerial perspective of the research, against a proliferation of study in this field. The stages and guidelines to be followed were clearly depicted on the model and subsequently described in order for a powerful destination brand to be established. Taking into account that destination branding effectiveness is a complex issue and cannot be easily engendered, a successful destination branding strategy may constitute a source of nationwide competitive advantage.

Since this preliminary work is grounded on only two destination cases, further research is mostly welcome in order for a widely accepted destination branding framework to be developed. Important opportunities are offered for researchers and practitioners to undertake pioneering work in the development, implementation and assessment of a destination branding success story.

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