

COMPETITIVENESS OF KVARNER REGION: CHALLENGES FOR DESTINATION MANAGEMENT AND BRANDING

Review

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Received 23 January 2012

Revised 27 February 2012

1 March 2012

6 November 2013

Abstract

Purpose – Tourism demand for destinations, services and facilities is changing rapidly and only the destinations with high adaptability can expect to survive. Tourists prefer destinations with strong brands that guarantee a high level of service quality and are prepared to pay for it.

Design – This study designs to determine that destination has to recognize the importance of tourism, but, as a brand, Kvarner is not distinctive enough. Based on its natural beauty, rich heritage and its vicinity and accessibility to a large part of Europe, it has the potential of becoming a leading destination.

Methodology – Research was carried out in accordance with the Integrated Model of Destination Competitiveness based on 85 indicators. Various statistical methods like T-test, Wilcoxon signed rank test and Shapiro-Wilk test were used.

Approach – The research was conducted using a questionnaire, through a dissemination of e-mails and personal interviews with tourist officials and people involved in the development of tourism in the Kvarner area.

Findings – This study finds that destination management is the weak point of destination competitiveness and hypotheses that resources strongly support the overall competitiveness of destination Kvarner, than the elements of destination management and that destination brand is not sufficiently distinctive are confirmed.

Originality of the research – This study provides valuable information and comparable data about competitiveness of Kvarner destination and points at brand influence on destination competitiveness.¹

Keywords destination competitiveness, destination management, branding, Kvarner destination

INTRODUCTION

The world's leading destinations were prompt to recognize the importance of branding as such, and they have successfully packaged their resources (natural and created attractions, with both cultural and historical heritage) into distinctive and desirable tourism products (New York, Edinburgh, Hong Kong, the Oresund region). In order to learn from the best and to make a destination more competitive, it is necessary to bring the tourism offering together under a distinctive destination brand. In order to ensure

¹ The research results derive from the scientific project "Quality models and public-private sector partnership in Croatian tourism" (project no. 116-1162459-2456), financially supported by the Ministry of Science, Education and Sports of the Republic of Croatia.

the best possible position, the destination management needs to have a clear vision, a strategy and an identity; in short, it requires the development of a distinctive brand. This implies a creation of a uniquely designed identity system that encompasses the advantages of a physical place (history, culture and tradition) and the modern social dimension of the tourists and residents' community. A successful destination brand helps making a place distinctive by conveying the promise of experiences and benefits, gained from staying in the destination, to the potential visitors.

Croatian tourist destinations are present and well recognized on the international tourism market and should therefore improve the competitiveness of their own tourist offering. According to Travel and Tourism competitiveness Report, Croatia ranks 34th in the world. Kvarner area is one of the most developed tourism regions in Croatia, with 173 000 accommodation capacities, which represent approximately 20% of the total tourism carrying capacity, and generates around one fifth of the total tourist traffic in Croatia.

This paper aims at testing a conceptual model of tourist destination competitiveness with the following hypothesis: H1: Destination management is the weakest element of destination competitiveness. H1a: The resources support the competitiveness of the Kvarner destination stronger than the elements of destination management. H1b: The Kvarner Destination as a brand is insufficiently distinctive. H1c: Of all the competitive groups based on resources, destination of Kvarner is most competitive in the inherited resources. Destination competitiveness was assessed by using the Integrated Model of Destination Competitiveness with the score of 85 indicators, covering a variety of destination segments.

1. LITERATURE REVIEW

A destination needs to be able to meet the challenges of the modern tourist market, which involves the construction of a destination management system that will meet its needs. The literature contains a number of scientific studies which cover the field of destination management. Ritchie has investigated the approaches in reaching consensus in a long-term vision (15-20 years) of the socio-economic development of tourist destinations. He defined nine elements that can be divided into two basic categories: the first - general values that a destination should develop, whereas the second explicitly describes critical dimensions that should be developed in the tourist system (Ritchie, 1993, 385). Donnelly and Vaske showed that tourist organizations need to demonstrate their members the value they can offer and the benefits that the latter receive in order for the members to voluntarily pay the required fees (Donnelly, Vaske, 1997, 53). Buhalis (2000) explains the concept of a tourist destination (through sustainable resources) and emphasizes the fact that destination marketing should be a strategic objective to all stakeholders. Destinations and their managers should also take advantage of the new technologies and the Internet in order to increase competitiveness.

Various definitions and explanations of the term *brand* can be found in the literature. The American Marketing Association (AMA) defines *brand* as a name, term, sign, symbol, design, or a combination of them, intended to identify a product or service and differentiate it from rival products and services. Above all, a brand helps to differentiate a product in the consumers' perception. The term *brand* may be applied to products, as well as to countries, regions and towns, that is, destinations. In recent years, the term has become increasingly present in the Croatian language.

Branding is a marketing and managerial process by which a specific product/service is given a unique identity and image to make it distinctive and differentiate it from the competition (Cetinski et al., 2006, 106). New definitions of *brand* and *branding* imply the following elements (Skoko, 2009, 128):

- Reinforcing the distinctiveness of the product/service's identity and improving its image
- Building future identity
- Making promises and having the ability to deliver promises to end consumers in accordance with how they experience a brand
- Giving an object a "soul" and bringing it to life in the minds of consumers
- Generating value added by creating a brand's emotional (intangible) and functional (tangible) attributes
- Creating unique emotional associations
- Entering the mind of consumers and creating qualitative differences relative to the competition.

Bahr Thompson lists four basic characteristics of brand positioning (Thompson, 2003, 84) relevance, diversity, credibility and flexibility. The difference between a brand and branding can be explained as follows (Anholt, 2009, 4) a brand is a product, service or organization considered in relation to its name, identity and reputation, while branding is the process of creating, planning and communicating a name and identity for the purpose of building or managing a reputation. Anholt distinguishes between four aspects of a brand: identity, image, purpose and market value.

From the product/service aspect, brands fall into two categories: manufacturer brands and product/service brands. A manufacturer brand ensures the identification of manufacturers with their products in the selling process. This is especially important when introducing new products, as a manufacturer brand helps to instil trust in customers regarding the quality of a previously untried product.

Based on a large part of the theoretical and professional literature, it can be postulated that the modern scientific and professional position of city branding, together with a considerable part of nation branding, has developed from destination branding. A rather complex terminology has developed from relating to the concepts of place branding, city branding and nation branding, applied in areas such as economics, marketing, political sciences, sociology, museology or communicology (Hanna and Rowley, 2008, 67). In the development of scientific and professional-consultancy terminology, there is a clear tendency to take the reasons and methods used in destination branding and apply them to the level of a community in general, regardless of whether tourism is a

dominant model in that community (Hanna and Rowley, 2008, 65). Considering the importance of experiences and emotional connections with a destination brand, the most appropriate definition of branding is that of J.R. Brent Ritchie and Geoffrey I. Crouch. A destination brand is “a name, symbol, logo, word mark or other graphic that both identifies and differentiates the destination; furthermore, it conveys the promise of a memorable travel experience that is uniquely associated with the destination; it also serves to consolidate and reinforce the recollection of pleasurable memories of the destination experience” (Ritchie and Crouch, 2003, 196). In the book “Marketing in the Public Sector”, Kotler defines branding as the process of developing a desirable brand identity (Kotler and Lee, 2007).

2. RESEARCH RESULTS ON THE KVARNER DESTINATION

Kvarner area includes “Primorsko-goranska županija”, which is the sixth county in Croatia, and consists of 14 structured cities and 21 municipalities. The county has a tradition of tourism development more than one and a half centuries long, but the destination itself has not yet developed its own brand recognizable in the tourist market. Kvarner has the potential to create a valuable tourist experience and successful destination branding. The rest of this article will identify and explore the competitive advantages and analyze the competitive position of the Kvarner destination.

For the purpose of this research, a survey was conducted among tourist workers and persons involved in the planning of tourism development (local and regional self-government, tourist boards and development agencies). Its aim was to form a complete picture of the opinions and attitudes of the survey’s participants, in relation to the Kvarner destination.

Research was carried out according to the Integrated Model of Destination Competitiveness (Ritchie and Crouch, 2003; Dwyer and Kim, 2003), successfully applied in Slovenia (Gomezelj Omerzel and Mihalič, 2008).

The assessment of destination competitiveness was based on scores received for 85 indicators that comprise various destination segments. They are divided into 6 basic groups or competitiveness factors:

- Inherited resources (natural, cultural)
- Created resources (tourism infrastructure, events, entertainment)
- Supporting resources (general infrastructure, quality, accessibility)
- Situational conditions (location, security and safety, political dimensions)
- Destination management
- Demand conditions (awareness, perception, preferences)

Inherited, created and supporting resources comprise various features of the destination that attract visitors. Destination management deals with factors which increase the attractiveness of resources, strengthening the quality of supporting factors. This category includes the activities of Destination Management Organizations (DMO),

marketing management, the development of human resources and environmental protection management.

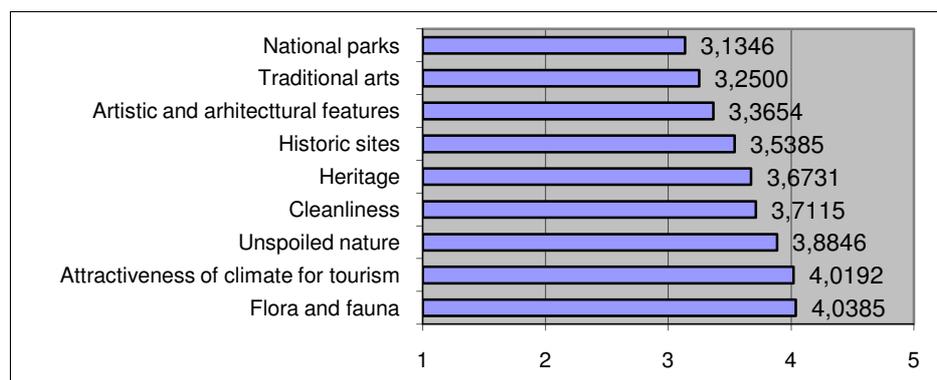
The research was conducted using a questionnaire, through a dissemination of e-mails and personal interviews with tourist officials and people involved in the development of tourism in the Kvarner area. Research was conducted in the period from February to September 2010. Out of 380 questionnaires sent, 107 were obtained back, and 104 of those were completed and usable for further analysis. The response rate was 27%, and the sample was considered relevant.

The sample involved managers in tourism associations (27.9%), of hotel managers (23.1%), travel agencies employees (18.3%), local governments officials (10.6%), tourism postgraduate students (7.7%) employees of educational institutions in the field of tourism (4.8%), civil servants (4.8%), and others (2.8%). Questionnaires were mostly returned via e-mail, and a smaller part was personally submitted. Most of the participants were under the age of 40 (70.2%), and the respondents were of the average age of 38.7. Most of the questionnaires were answered by women (68.3%). Most respondents had a university degree (58%), 23% of them had high school education and 19% had a Master's degree or a Ph.D.

The following section looks at the indicators of Kvarner tourism competitiveness, grouped into six basic groups of competitiveness factors, as suggested by the Integrated Model of Destination Competitiveness (Gomezelj Omerzel and Mihalič, 2008). The study involved the assessment of 85 indicators evaluated using the Likert scale with values from 1 to 5, and the indicators included various segments of destination offerings. Subjects rated indicators on a scale from 1 to 5, associated with the following values: 1 - below average, 2 - slightly below the average, 3 - average, 4 - slightly above the average, 5 - well above average.

In comparison with competitive destinations, the Kvarner region holds a good position with regard to inherited resources – natural resources, in particular.

Figure 1: **Inherited resources of Kvarner tourism**

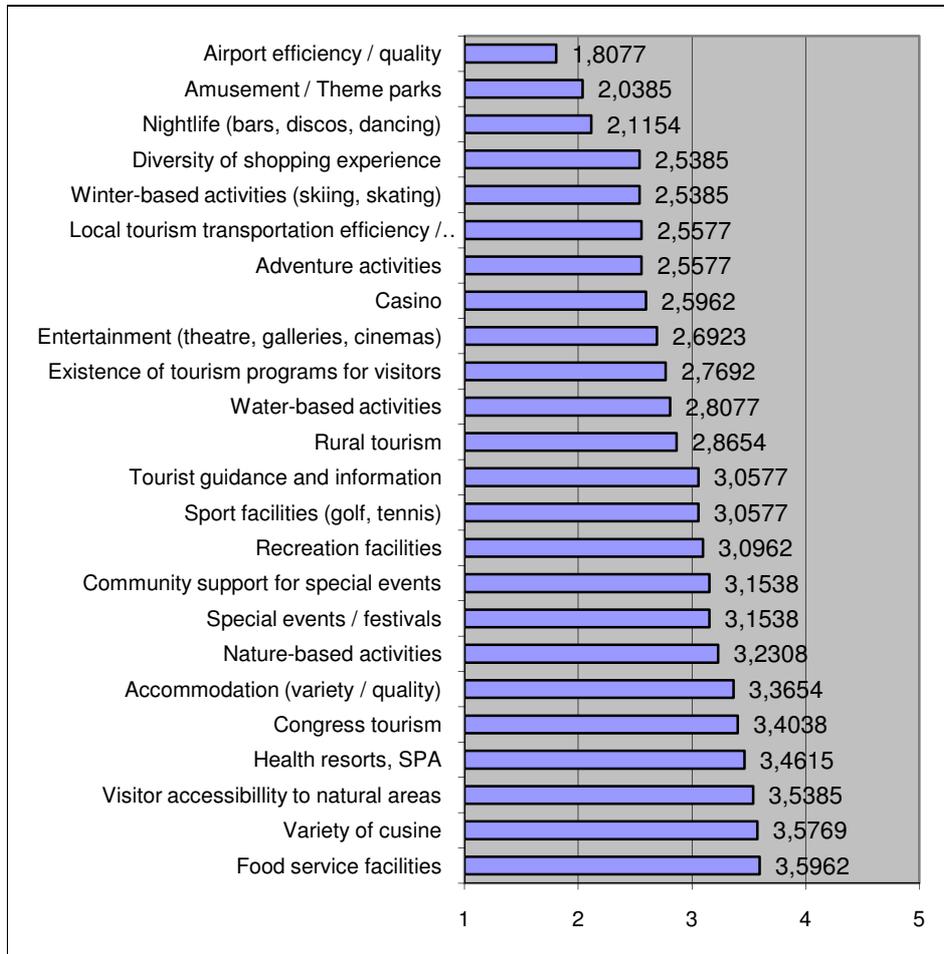


Source: Bagarić, L. (2012), Upravljanje procesom brendiranja na primjeru turističke destinacije Kvarner (doctoral dissertation), p.173.

The indicator “Richness of flora and fauna” received the highest score, followed by “Climate attractions”, “Pristine nature” and “Cleanliness”. The least competitive is the “National parks”, considered as being insufficiently valorised, together with traditional art. On the whole, a good score was expected for the inherited resources, following from the undisputable richness of Kvarner’s natural and cultural-historical background.

However, the scores given to created resources greatly differ. The indicators “Hospitality services and facilities”, “Cuisine diversity”, “Accessibility” and “Wellness and conference centres” obtained fairly high scores, while “Airport” (the lowest scoring indicator in the entire survey), “Theme parks”, “Night life” and “Entertainment”, in general, got very low scores. The results suggest the need for additional investments in providing more entertainment facilities and services to complement the high scoring food-and-lodging offering.

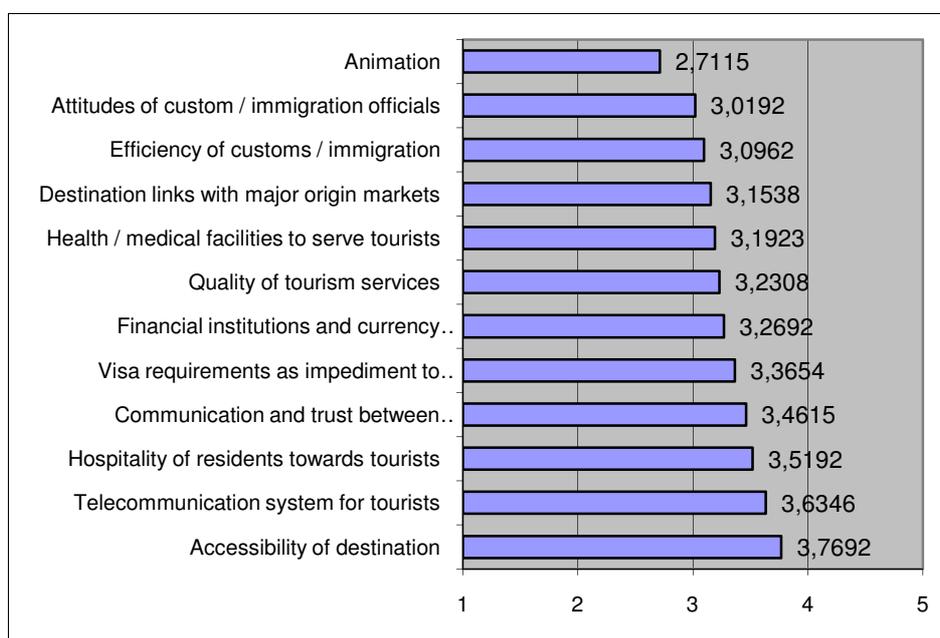
Figure 2: Created resources of Kvarner tourism



Source: Ibidem, p.174.

Similar to the previous group of indicators, the scores given to the indicators of auxiliary services and facilities are also diverse, although not to such a large extent. The highest scores went to “Accessibility of the destination”, “Telecommunication systems available to tourists” (Rijeka and Opatija have made great progress in this respect through free wireless internet access), “Friendly and caring staff”, and “Trust between residents and tourists”. The indicators “Tourist animation”, “Customs offices” and “Traffic links between the destination and target market” were rated as problematic.

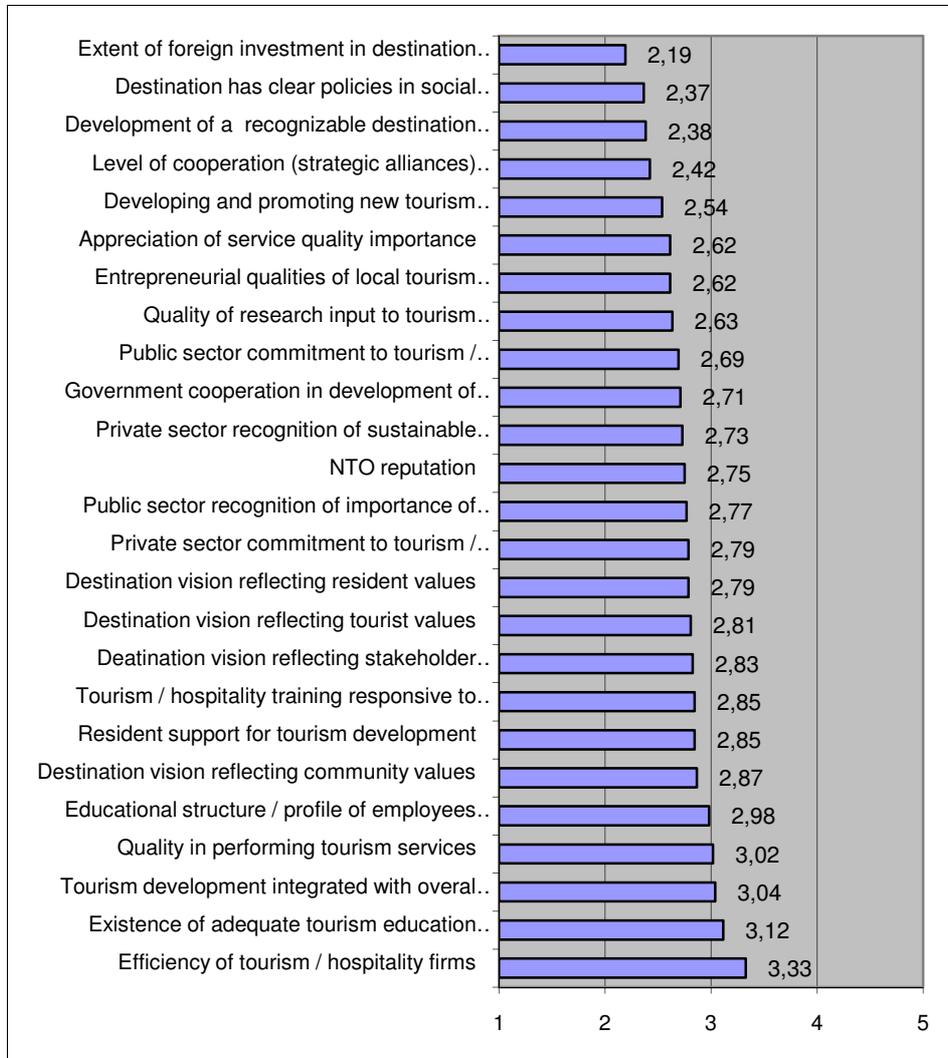
Figure 3: Supporting resources of Kvarner tourism



Source: Ibidem, p. 175.

The indicators of destination management scored as relatively poor. The indicator “Growth of foreign investment in tourism” has one of the lowest scores. This probably affects the generally poor investment climate in the entire country. The absence of a clear vision and development strategy, the lack of destination branding and new tourism-product development, as well as poor cooperation among destination actors, are considered problematic. Instead, “Benefits from tourism”, “Appropriate educational programmes” and “Quality in providing tourism services” obtained quite good scores.

Figure 4: **Destination management**

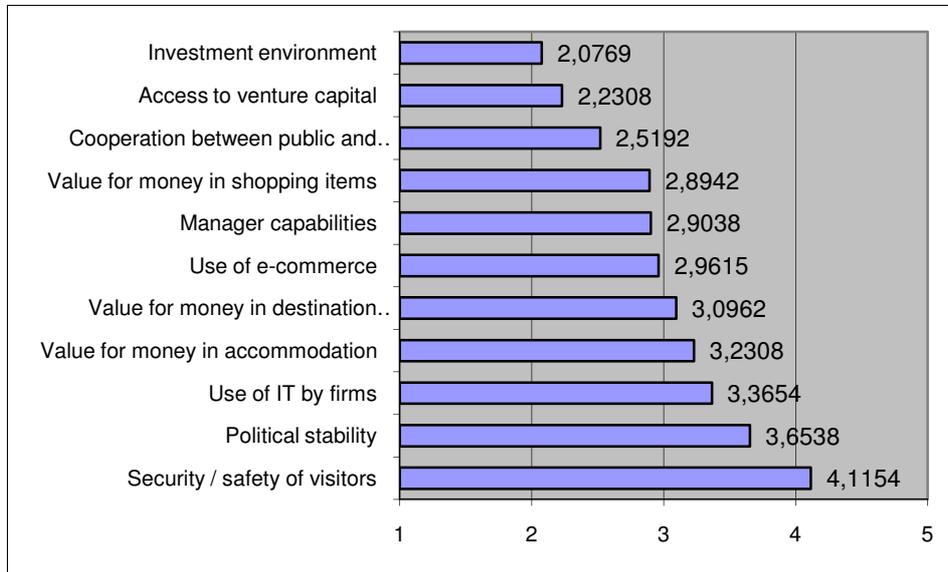


Source: Ibidem, p.176.

A destination's competitive ability also depends upon the overall structure and positive environment in which the destination is located. Kvarner is competitive in ensuring tourist safety and security (one of the highest scoring indicators), and the political environment is considered to be stable. Another competitive and very important indicator is "Value-for-money in the destination". The indicators "Investment and entrepreneurial climate", "Availability of entrepreneurial capital" and "Public-private sector cooperation" were poorly rated.

Destination brand is one of the worst-rated elements of destination management, which confirms the hypothesis H1b.

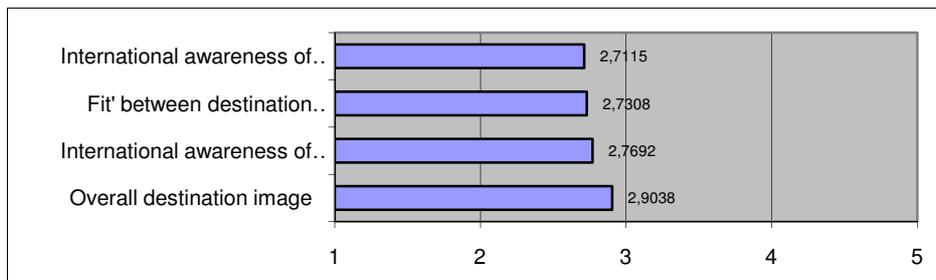
Figure 5: **Situational conditions of Kvarner tourism**



Source: Ibidem, p.177.

Indicators of the conditions of demand refer to the international perception of the destination's image, which can be measured through international awards to destinations and destination products. These indicators obtained very poor scores in the survey.

Figure 6: **Demand conditions of Kvarner tourism**



Source: Ibidem, p.178.

The survey shows that the destination brand has received a below-average rating, indicating that the Kvarner destination is not sufficiently distinctive and its brand is poorly developed.

3. COMPETITIVENESS APPRAISAL RESULTS

Evaluation of competitiveness of the destination management, along with the other indicators of competitiveness, was performed by being based on the model proposed by Gomezelj Omerzel and Mihalič (2008). Numerical summaries of groups of competitiveness indicators have been defined for model testing requirements. The competitive position of the Kvarner destination has been compared to that of the main competitors by calculating the arithmetic means of groups. It also served the purpose of defining Kvarner's competitive advantages and disadvantages as well as determining the significant difference in evaluation of each group. T-test for dependent samples was used, along with the Wilcoxon signed rank test in the case of non-normal distribution of variables. Shapiro-Wilk test was used for testing normal distribution.

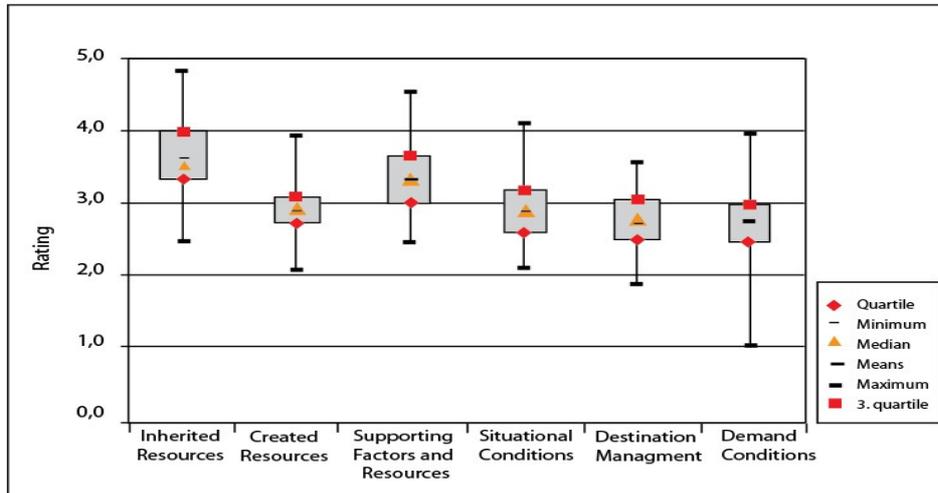
Descriptive analysis results of ratings of groups of indicators of competitiveness for the Kvarner destination are shown in Table 1.

Table 1: Descriptive analysis of groups of competitiveness indicators

Group of indicators	N	Means	STD	CV	Median	Min	Max
Inherited resources	104	3,6	0,490	13,5	3,5	2,5	4,8
Created resources	104	2,9	0,339	11,7	2,9	2,1	4,0
Supporting Factors	104	3,4	0,425	12,6	3,4	2,4	4,6
Situational conditions	104	2,9	0,409	14,1	2,9	2,1	4,1
Destination management	104	2,8	0,342	12,4	2,8	1,9	3,6
Demand Conditions	104	2,7	0,607	22,2	3,0	1,0	4,0

Since we are dealing with the tests of multiple comparisons (where we observe the existence of significant differences in evaluating each pair of groups of competitiveness) that cause increased probability of the type I error occurrence (significance level), p-values have been corrected by using the sequential Bonferroni correction. The Bonferroni correction moves the level of significance of each individual test to α/n , where α is the overall level of significance (most frequently, 0,05) and n is the number of each individual test, i.e. hypothesis. Although this type of correction is quite conservative and has a negative impact on the strength of the test, it can be modified with sequential correction. The level of significance to each variable moves to $\alpha/(n - \text{variable rang according to } +1 \text{ level of significance})$.

Figure 7: Box plot diagram to ranks of competitiveness groups



Source: Authors' analysis

The box plot stands for numerical characteristics of sets of measured values and is used as a graphic representation of the distribution of the large as well as the small set of numerical data. It enables us to directly read the median, upper and lower quartile, interquartile, range, extreme values and symmetry.

The inherited resources, with the average score of 3,6, as well as the supporting factors (3,4) have been rated above average which suggests competitive advantage of the Kvarner destination over the main competitors. Created resources and situational conditions have been rated as nearly average (2,9) while categories of the destination management (2,8) and demand conditions (2,7) have been rated the lowest which indicates potential competitive weaknesses. Standard deviation and coefficient of variation point to a high level of agreement among examinees when it comes to rating each group of competitiveness. Examinees are least agreeable in rating the demand conditions.

Table 2: Testing the normality of differences between groups of competitiveness indicators

Variable	Test statistics (W)	p-value
INHRES - CRERES	0,953	0,001
INHRES - SUPRES	0,974	0,040
CRERES - SUPRES	0,989	0,541
SITCON - DESTMNGM	0,991	0,706
DEMANDCON - DESTMNGM	0,976	0,053

Variable	Test statistics (W)	p-value
SITCON - DEMANDCON	0,976	0,060
INHRES - DESTMNGM	0,980	0,115
CRERES - DESTMNGM	0,987	0,412
SUPRES - DESTMNGM	0,987	0,403
INHRES - DEMANDCON	0,985	0,295
CRERES - DEMANDCON	0,958	0,002
SUPRES - DEMANDCON	0,981	0,146
INHRES - SITCON	0,977	0,063
CRERES - SITCON	0,980	0,110
SUPRES - SITCON	0,985	0,294

Furthermore, the differences in rating the competitiveness groups have been analyzed to determine whether they are statistically significant. Normal distribution of variables was tested using the Shapiro-Wilk test. P-value being above 0,05 along with the inability to reject the null-hypothesis points to the normal distribution of variables.

Table 3: Testing the difference in ratings of grouped indicators of competitiveness

Varijable	N	Means	95% CI		STD	t	P-value
CRERES - SUPRES	104	-0,465	-0,554	-0,376	0,459	-10,32	< 0,001
SITCON - DESTMNGM	104	0,131	0,070	0,192	0,314	4,27	< 0,001
SITCON - DEMANDCON	104	0,153	0,007	0,298	0,749	2,08	0,040*
DEMANDCON - DESTMNGM	104	-0,022	-0,147	0,104	0,644	-0,34	0,733
INHRES - DESTMNGM	104	0,863	0,757	0,969	0,544	16,17	< 0,001
CRERES - DESTMNGM	104	0,143	0,068	0,217	0,383	3,80	< 0,001
SUPRES - DESTMNGM	104	0,608	0,539	0,677	0,354	17,49	< 0,001
INHRES - DEMANDCON	104	0,885	0,748	1,021	0,703	12,83	< 0,001
SUPRES - DEMANDCON	104	0,629	0,483	0,776	0,753	8,52	< 0,001

Varijable	N	Means	95% CI		STD	t	P-value
INHRES - SITCON	104	0,732	0,610	0,853	0,625	11,93	< 0,001
CRERES - SITCON	104	0,012	-0,064	0,087	0,386	0,3	0,763
SUPRES - SITCON	104	0,476	0,398	0,555	0,402	12,09	< 0,001

* After the Bonferroni correction, p-value is not significant

T-test for dependent samples was used in the case of normal distribution of the differences in observed paired competitiveness groups rating, since it is stronger than its nonparametric version, the Wilcoxon signed rank test. When reverse, the mentioned Wilcoxon signed rank test was used.

Table 4: Testing the differences in the rating of groups of competitiveness indicators (Wilcoxon signed rank test results)

Varijable		Mean	p- value
INHRES - CRERES	Inherited resources	3,6	< 0,001
	Created Resources	2,9	
INHRES - SUPRES	Inherited resources	3,6	< 0,001
	Supporting Factors	3,4	
CRERES - DEMANDCON	Created Resources	2,9	0,003
	Demand Conditions	2,7	

Differences between all competitiveness group pairs are significantly above zero, exception being differences in the rating of demand conditions and destination management (DEMANDCON – DESTMNGM), created resources and situational conditions (CRERES – SITCON) and, taking the Bonferroni correction into consideration, between situational conditions and demand conditions (SITCON – DEMANDCON; p-value after Bonferroni correction= $0,04 \cdot 3 = 0,12 > 0,05$).

All resource groups have received significantly higher rates than the destination management which confirms our auxiliary H1 hypothesis; the resources are a stronger support for destination competitiveness of Kvarner than the elements of destination management. Situation conditions are rated higher than destination management and the difference in question is statistically significant. However, the results have not confirmed the presence of a significant difference in rating demand conditions and destination management. Demand conditions have been rated significantly lower than the resources, while their rating difference and the one between situation conditions and destination management are not statistically significant.

Accordingly, H1 hypothesis (destination management is the weakest competitive element of the Kvarner destination has been partially confirmed. Hence, the destination management, along with the demand conditions, is the worst rated competitiveness

group of the Kvarner destination. The third, H1c hypothesis, stands for competitive relations between groups of destination resources. In general, the inherited resources are the best rated competitiveness group with the difference being statistically significant in comparison to all groups. Hence, the H1c hypothesis is confirmed. Statistically significant difference is also found between the other two groups of resources where the supporting factors have been rated significantly higher than the created resources.

CONCLUSION

In order to increase competitiveness, the Kvarner destination management should also include brand management, operating within the framework of a destination management organization, which is the Kvarner Tourist Board. Pursuant to the new Act on Tourists Boards, tourist boards should take charge of tourism management in a destination where they operate and at the level at which they are established. Accordingly, they should also carry out the tasks of destination-brand management. Consequently, the Kvarner Tourist Board is responsible for the Kvarner destination, and it should establish a special department to take charge of brand management. A destination brand “guarantees” the quality of products and services offered in the destination, and this is, surely, the best and least expensive type of advertising and attracting tourists. It is up to destination management organizations to choose aspects of the destination experience on which it will be built. Typically, they use a destination’s most important features and the advantages it holds over its competitors.

Research has confirmed the hypothesis that the Kvarner destination is more competitive in its resources, than in destination management. Research also shows that the strength of a brand influences the growth of a destination’s competitive ability in the tourism market, because a recognizable destination brand attracts tourists who are willing to pay a higher price to visit such a place. It can be concluded that destination management is the weak point. A big step forward is the 2009-2015 Strategic Marketing Plan of Tourism Development in Kvarner. This document defines the region’s branding strategy, the basic principles of which have been outlined in this paper. The Strategic Marketing Plan will not be effective, however, if it remains just another document kept in a drawer or on a web page.

In April 2013th, the Croatian Parliament adopted the strategy of Croatian tourism, which is, along with the legislative regulations, the main prerequisite for competitiveness.

Destination management should strive to accomplish the basic goals, which include creating a strong destination brand, making it competitive and sustainable and planning development to ensure that the result of all efforts is greater than the sum of individual results, that is, to ensure that added value is created. Only creative and branded destinations that encourage and develop their uniqueness and local identity will be able to ensure competitiveness in the tourism market.

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