

Part Nine

Case studies



Introduction

This book has used copious examples and mini-case studies to illustrate points made in individual chapters.

However, the authors also believe that readers might find a small number of larger and broader case studies valuable.

The case studies which follow show how a number of leisure organisations currently carry out their marketing activities. These cases illustrate some interesting differences and similarities in marketing practice.

It should be noted that the material for these case studies was collected, largely during 2003 and early 2004. They must therefore be seen, like all published case studies, as snapshots in time, which will date quickly. Of course, this does not make the lessons that can be learned from them invalid.

Case study 1

The Victoria and Albert Museum (V&A)

The Victoria and Albert Museum is the National Museum of Art and Design in the UK, devoted to increasing the understanding and enjoyment of art, craft and design through its collections.

The V&A Museum was originally opened in 1852 as a Museum of Manufacturing, situated in the centre of London, in Marlborough House. The museum moved in 1857 to the fields of Brompton, where it became known as the 'South Kensington Museum'. In 1899 it was renamed 'The Victoria and Albert Museum' in honour of Queen Victoria and Prince Albert. Queen Victoria laid the new foundation stone of the new building in that year. It is not, however, a museum of Victoriana. The strength of the collections lie in the combination of great works of art with a broad range of objects of many different types and styles. It contains the national collections of furniture, silver, fashion, ceramics, glass, sculpture, watercolours, jewellery and photographs drawn from Britain and over the world, and spanning 4000 years.

Facilities

The V&A is situated in South Kensington. It is near to other major museums of London – The Science Museum and the Natural History Museum.

The main museum is situated on four floors and houses the core collections of sculpture, ceramics, furniture, glass, etc.

The guide book suggests that the visitor should walk around these galleries following colour-marked routes in the book.

The remainder of the exhibits are housed in the Henry Cole Wing, which is accessed from the ground floor. This wing of the museum houses Fine Art including an impressive collection of paintings by Constable, ornaments and English Miniatures. The museum also has the following facilities:

V&A shops

The shops sell products associated with the museum. The shop stocks an excellent range of

quality gifts, stationery, books, ceramics and textiles. There is also a Crafts Council shop.

The new restaurant

Open:

Monday	12.00–17.00
Tuesday–Sunday	10.00–17.00

The restaurant is well furnished and provides an excellent range of food and drink. There is a jazz brunch on Sunday mornings.

V&A picture library

Offers pictures for loan including commercial loan.

Research services

The V&A offers an extensive range of research services and opinion services. These include:

- National Art Library – housing 1 million books – The National Collection of books on art
- Archive of Art and Design.

Study rooms

- the Print Room
- the Textile Study Room
- India and Southeast Asia Study Room
- Theatre Museum Archive and Study Room.

Branch museums

The museum has completed an extensive programme of structural repair and redecoration of Aspley House, which is situated at Hyde Park Corner. This was given to the nation in 1947 by the Seventh Duke of Wellington. It is a palatial London townhouse which houses a spectacular collection of paintings with works by Velázquez, Murillo, Correggio, Rubens and Van Duke.

The V&A also has branch museums at Bethnal Green and Russell Street, Covent Garden. Details of the branch museums are shown in Exhibit 1.1.

Exhibit 1.1

The branch museums of the V&A

1. **Bethnal Green Museum of Childhood, Bethnal Green, London**
The national museum of childhood displays. Facilities include a shop and café. Free entrance
2. **Theatre Museum, Russell Street, Covent Garden**
The national museum of the performing arts. Admission charges
3. **Aspley House 'Number 2 London' Hyde Park Corner, London**
The home of the Duke of Wellington Fine collection of art, sculptures, furniture and personal relics of the Duke. Admission charges

Market position

The V&A is one of the major museums which are open to the public in London. It is also an example of a leading National Museum.

The V&A has recorded increasing numbers of visitors over a ten-year period. This growth started in 1994 when the V&A welcomed over 1.4 million visitors which was a large increase on figures for 1993.

Director of the V&A in 1995, Elizabeth Esteve-Coll, reported this success in the following statement:

There is no doubt that members of the public are enjoying our exhibition programme, and, more importantly, are taking time to explore and get to know the permanent collections during their visits.

A profile of visitors for the period 2000–2002 is shown in Exhibit 1.2.

This exhibit shows some interesting facts in relation to the museum, as follows:

- A larger proportion of women (64 per cent in 2002) visit the museum compared to men (36 per cent in 2002). This is because of the theme of the museum which has a strong focus on design.
- The individual visitor tends to be older. This data does, of course, exclude school visits. This is probably due to the theme of the museum that attracts an older age group.
- The individual visitor comes from a high socio-economic group as a result of the theme of the museum.
- A large proportion of the individual visitors come from the UK, with a preponderance coming from London and the Southeast.

- A small percentage of the visitors came from North America (16 per cent in 2002) and Europe (12 per cent in 2002). Nine per cent of visitors came from the rest of the world in 2002.
- A large proportion of the visitors are from the white ethnic group (90 per cent in 2002).
- A large proportion of the visitors are repeat visitors who have been before (59 per cent in 2002). This shows the importance of relationship marketing in the museum strategy.

Financing the V&A museum

The museum is funded through a number of sources:

- *Government grant* broken down between building maintenance and acquisitions grants;
- *Donations from visitors* amount to over £1 m annually;
- *Development Office*: dealing with corporate Patrons and Benefactors of the V&A; raising sponsorship for the refurbishment of existing galleries and the creation of new galleries;
- *V&A Enterprises*: The trading arm of the V&A. V&AE's areas of activity include: running the two museum shops and a mail order catalogue service; licensing and development of new product lines based on objects in the collections; corporate entertaining through the Special Events Department using the V&A as a different and unusual place for corporate events such as dinners, receptions, recitals, private views of exhibitions and galleries, etc.;
- *Friends of the V&A*: The Friends – are very productive in raising funds for the museum, and pay an annual membership fee. All revenue generated is used to finance various projects

Exhibit 1.2

Summary	2000– 2002	2002				2001			2002									
		Spring	Summer	Autumn	Ave	Spring	Summer	Autumn	Spring	May	June	July	Aug	Sept	Oct	Nov	Dec	Ave
GENDER	Male	33	33	34	33	33	33	42	39	43	27	40	29	43	39	28	36	36
	Female	64	66	64	65	67	66	57	61	57	73	60	71	57	61	72	64	64
AGE	To 15	9	9	9	9				5	11	8	5	19	6	8	5	3	8
	16–24	12	16	21	16	13	13	10	1	5	7	17	11	9	9	15	15	10
	25–34	15	18	19	17	15	24	17	11	26	11	19	11	20	22	19	14	17
	35–44	15	18	15	16	19	16	17	15	24	25	18	23	17	22	19	15	20
	45–54	15	18	15	16	23	17	24	22	16	18	27	24	24	21	18	24	22
	55–59	23	18	14	18				22	7	22	11	13	7	15	8	12	13
	60–64								7	10	6	1	9	7	7	9	9	7
60+	7	7	10	8	31	28	32	21	13	12	8	10	16	6	11	10	12	
SOCIO- ECONOMIC CLASS	AB	61	47	44	51	51	57	54	43	50	46	51	46	52	39	54	35	46
	C1	29	41	44	38	28	29	38	43	43	41	43	42	20	44	31	46	39
	C2	6	7	4	6	9	5	4	5	2	3	4	5	9	6	4	3	5
	DE	4	4	3	4	6	5	3	7	2	10	2	7	2	4	5	5	5
	Student	10	16	25	17	12	15	9	9	6	5	17	10	10	7	13	11	10
ORIGIN	London	32	24	37	31	29	34	33	27	28	29	28	26	29	31	25	32	28
	S/E	22	16	15	18	25	17	19	28	10	22	5	21	12	18	21	12	17
	Rest of UK	16	13	17	15	17	16	24	22	18	18	18	17	13	21	18	17	18
	Europe	10	13	8	10	9	11	8	10	7	8	17	15	9	14	10	16	12
	N.America	15	24	20	20	16	14	9	10	26	16	22	12	17	10	12	15	16
	Rest of World	3	12	6	7	5	7	4	3	12	8	11	9	16	7	7	6	9
ETHNICITY	White								93	94	88	89	93	89	88	93	83	90
	Mixed								1	1	1	4	2	1	2	1	1	2
	Asian								0	2	7	2	2	6	0	1	3	3
	Black								1	0	0	0	0	0	0	1	1	0
	Chinese								0	1	1	1	0	3	3	0	0	1
	Other								2	3	2	4	2	1	6	2	8	2
	Refused								2	0	1	1	0	1	1	2	5	1
REPEAT	First visit	34	52	45	44	34	39	27	35	41	29	57	50	45	45	29	36	40
	Been Before	65	48	55	56	66	61	73	65	59	71	43	50	55	55	63	64	59

Source: Mori Visitor Profile. The Victoria and Albert Museum

such as gallery improvements. Benefits of being a Friend include private viewings of exhibitions, a newsletter three times a year, access to Late View, exclusive use of a Friends Room and free access to all exhibitions;

- *International and American Friends of the V&A*: a new charity set up in 1993 to further the work done by the UK Friends.

Current marketing issues

Museums will stand or fall not only by their competence to care for collections, but by their ability to care for people. In other words, they need to be market-oriented if they are to survive.

Cossons (1985)

The aim of the marketing and public relations department of the Victoria and Albert Museum is to position the V&A as the natural museum of choice for leisure, education and association in support of its mission.

The museum is faced with competition from all leisure activities, but must maintain an increasing annual visitor number. It is also being faced with more financial constraints, and is seeking to increase revenue wherever possible. The main issues which are facing the museum are therefore common to other visitor attractions.

The V&A building is a Grade 1 listed building. One of the main strategic issues facing the museum is how to make the building attractive to visitors, and incorporate services which will not alter the fabric of the building.

High profile public relations campaigns are an essential part of the marketing campaign. The press office are proactive, developing relationships with a range of media in support of the press strategies.

The main objectives of the current Marketing and PR are shown in Exhibit 1.3.

These objectives were derived after considering the strategic vision of the museum.

Build awareness, understanding, and influence

The marketing department of the V&A ensures that the museum has a high profile. This assures that people know about the museum and want to do something about it. This means that visitors continue to come. It also helps to support relationships with business contacts who provide an important source of sponsorship.

The museum also has strong links with the tourism and attractions industry. It has a close relationship with bodies such as the LTB (London Tourist Board), London First and VB (Visit Britain).

The V&A considers itself to be a *leisure attraction* and uses the marketing techniques which have been developed in the private-sector service industries.

It is important that media coverage of the museum is always achieved, particularly when the excellence of research, education, sponsorship, conservation and scientific development can be covered.

An example of an educational development which the V&A used to gain media coverage was the work that the museum staff have completed with teachers to develop the National Curriculum. Scientific breakthroughs can also offer the V&A the opportunity for press coverage. The V&A Science staff, for example, have worked with scientists from the neighbouring Imperial College in the area of glass conservation and have made major scientific advancements.

Special events give the V&A a particular opportunity for raising the profile of the museum. The hosting of prestigious conferences and of exhibitions are examples of special events which can be used to give the museum a media coverage.

Exhibit 1.3

Main objectives of the marketing and PR plan

1. Build Awareness, Understanding and Influence;
2. Increase Visitor Numbers;
3. Increase Revenue;
4. Improve Visitor Experience through Information.

The reopening of Aspley House to the public also gave the V&A the opportunity to target media coverage.

Exhibitions and Gallery openings provide the largest opportunity for media coverage.

The V&A plans a balanced programme of large and small, scholarly and popular exhibitions to attract a broad range of audiences, and to enhance the visitors' understanding of the museum's collections. Exhibitions planned for the next two years include:

Vivienne Westwood

Bill Brandt

Exotic Encounters: the meeting of Asia and Europe
1500–1800

International Arts and Crafts

Diane Arbus

Admission and opening Hours

Admission to the Victoria and Albert Museum is FREE. There is a charge for major exhibitions.

Opening hours

10.00–17.45 daily (closed 24, 25, 26 December)

10.00–22.00 Wednesdays and the last Friday of the month (except December)

Increasing visitor numbers

It is very important that the museum continues to increase the visitor numbers each year. There are various methods which the museum can use to help the continued increase in visitor numbers, including effective market segmentation and targeting. The museum carries out quantitative market research at the main museum and during special exhibitions to identify a profile of visitors.

The press officers who work within the marketing department have the job of maintaining a strong, open and positive relationship with the press. The majority of this work is carried out in the UK, but the press officers are also responsible for communicating with the overseas press.

Special exhibitions are often promoted overseas. The Wedgwood exhibition, for example, which took place in 1995 was launched in France. The V&A sent a Japanese speaking press officer to support a touring exhibition of Japan and to promote the V&A in London as a tourist attraction.

Work on publicity leaflets and visitor services must continue on an ongoing basis to encourage increased numbers of visitors. This material should enable the museum to develop a strong image. The use of the V&A logo, for example, in all publicity material, is a very important aspect of this work. The visitor's first impression of the museum should be favourable. The design of information desks and the training of front-line staff in this area is an ongoing marketing activity.

The museum marketing department also identifies key activities which are developed each year. This can be in the form of a joint marketing activity with other museums. The development of overseas markets for a major museum is a key area of marketing activity. The V&A is busy developing the Japanese and American markets.

The main ways that the V&A is increasing visitor numbers can be summarised as:

- Effective targeting and planning;
- Effective advertising and promotional campaigns;
- The development of new propositions.

Specific campaigns are devised for particular exhibitions. These campaigns include leaflets, promotions and ticket offers. Each exhibition will have a different market segment. An exhibition or fashion, such as the Vivienne Westwood exhibition, which is due to take place in 2004 has a younger audience target, for example, than a more traditional exhibition such as the International Arts and Crafts exhibition scheduled for 2005.

The marketing department also liaises with the *Development Department* and the *Education Department*. The Development Department has the job of financing major developments at the exhibition and obtaining major sources of sponsorship.

The Education Department is responsible for development School and academic links. It is heavily involved in developing community education programmes.

The marketing department has also used sales promotion techniques to increase visitor numbers. The *jazz brunch*, for example, was so successful as an initial sales promotion when the V&A was opened on a Sunday morning that it has remained as a permanent fixture. Exhibit 1.4 shows the key market segment that the V&A is attracting.

Exhibit 1.4

Key market segments for the V&A

1. Local and regional residents living near the museum;
2. National visitors who are visiting London on a day trip, a short or longer break;
3. Overseas visitors travelling on their own;
4. Overseas visitors travelling in a group, usually in association with a package company.

Increasing revenue

The V&A marketing aim is to increase revenue from donations and exhibition revenue. This work has been concentrated in a number of areas, including:

- focusing on special exhibitions and therefore encouraging secondary spend in café/restaurant and shop;
- working to increase donation levels;
- working in partnership with marketing and travel operations.

In addition, the PR function helps support the wider museum aim of increasing sponsorship.

Improve visitor experience through information

The V&A aims to continually improve the levels of information and service which are available in the museum. This includes improvements to desks, signposting and ancillary services such as the restaurants.

The V&A has developed a prominent presence in London with the use of leaflets and posters. This is very important because the location of the museum, which is out of the main tourist area, means that it has to attract visitors from the centre of London.

The V&A carries out extensive market research with visitors to the museum and to the special exhibitions so that improvements can be made. The front of house service staff at the museum have all been trained in customer care techniques. Every two months, all the areas dealing with visitors meet in the 'Visitor Services Group' including security staff, restaurant, education department, desk staff, buildings maintenance and cleaning staff, and marketing department.

Other activities

Friends of the V&A

Friends of the V&A is an organisation which has been set up to support the work of the museum. Friends give their time in voluntary work and financially support a wide range of projects including the purchase of objects, refurbishment of galleries and grants for research.

Friends and Patrons of the V&A and their guests can attend special events including late viewing in the museum and late lectures. Drinks and buffet suppers are also served in the restaurant to accompany these events.

Special events

The V&A is housed in a magnificent Victorian building with remarkable rooms of the period. This has allowed the museum to offer clients the opportunity of entertaining in the heart of London.

The V&A can cater for receptions, dinners, lunches, conferences and presentations of up to 700 guests. Events can be booked in a number of key locations in the museum including The Dome, which is the museum's resplendent main entrance, and The Gamble Room and the Morris Room, which is smaller and elegant. The Pirelli Garden can also be used for entertaining and can be floodlit at night.

One of the most spectacular corporate venues in the country was opened in June 1995 as a result of Apsley House reopening. Apsley House can be booked as a corporate venue.

Conclusion

The Victoria and Albert Museum is one of the national monuments in the UK. The marketing activity carried out by the museum is critical for the success and development of the museum in the future.

Discussion points and essay questions

1. Evaluate the implications of the 2002 visitor profile data for future promotional strategies that might be undertaken by the Victoria and Albert Museum.
2. Identify the main competitors for the Victoria and Albert Museum and discuss how it might seek to gain competitive advantage over these competitors.
3. Discuss the challenges which the Victoria and Albert Museum will face from future changes in the macroenvironment.

Case study 2

Disneyland Resort, Paris: The marketing mix

After a difficult beginning, Disneyland Resort, Paris, has consolidated its position in recent years as the leading tourist attraction in Europe. This is partly the result of its famous brand name, of course, but it is also due to the sophisticated, well-funded marketing activities undertaken by Disneyland Resort, Paris. These activities involve the effective manipulation of the marketing mix or Four Ps; in this case study we will explore the marketing mix of Disneyland Resort, Paris, in a little detail.

Product

The product is multifaceted to appeal to different markets and tastes. Its main components are as follows:

- *Disneyland Park*, the original core of the attraction and the part based on the classic Disney characters. It has a number of themed elements including Main Street USA, Fantasyland, Frontier Land, Adventure Land and Discovery Land. This park is made up of rides including exciting 'white knuckle' rides such as Big Thunder Mountain.
- *Walt Disney Studios® Park*, a cinema, animation and television themed park with four areas, namely Front Lot, Animation Courtyard®, Production Courtyard® and Back Lot. This park is full of special effects as well as rides.
- *Major spectacles* on site such as 'The Lion King Show' and the 'Fantillusion® Parade'.
- A programme of *special events and festivals* all year round, including Disney character-based events such as the Disney Cinema Parade, together with seasonal events such as the Halloween Festival.
- *Opportunities*, at extra cost, to *meet Disney characters* and even share a meal with them.
- *Disney Village*, a complex of shops, shows and catering outlets that is open day and night.
- *Seven themed Disney Hotels*, aimed at different markets. They range from the Davy Crockett Ranch with its 'cabins' which are targeted at

self-caterers to the luxury of the full service Disneyland® hotel.

- *Special facilities for families with children* such as baby care centres, play areas and push chair hire.
- *Services for visitors with special needs* including those with mobility problems or visual impairments.
- *Golf Disney*, a 27-hole golf course near the Park.
- *Conference facilities* for business groups, under the brand name of 'Business Solutions'.

The attraction has different opening times at different times of the year. For example, in most of July and August, Disneyland Park opened from 9.00 am–11.00 pm in 2004, whereas it closed by 8.00 pm in June 2004.

As well as its own attractions, Disneyland® Resort, Paris, works with partners to promote other attractions that help reinforce its own appeal. In 2004 these other attractions included:

- the Manchester United Soccer School, football coaching services for youngsters aged between 7 and 14;
- Sea Life branded Aquarium Val d'Europe;
- La Vallée outlet-shopping 'village' selling famous brands at discounted prices;
- Themed family-oriented hotels such as the Movenpick Dream Castle Hotel;
- Excursions from the resort to Paris and Paris-discounted transport cards;
- Hertz car hire at the Disneyland® Resort, Paris, train/RER station.

Disneyland® Resort, Paris, is also keen not only to add new attractions each year to encourage first-time visitors, but also to persuade previous visitors to make another visit. For example, the Summer 2004 brochure had, on its cover, a headline note that there was a new Lion King show. However, it is interesting that other than this new feature, the brochure contained no news of other 'new' attractions at the resort.

Finally, the owners are constantly including new schemes to reduce the problem of queuing, such as the Fastpass® ticket.

Price

The Summer 2004 Official Holiday Brochure of Disneyland® Resort, Paris, showed that the owners are keen to sell 'added value' packages as well as park entrance tickets. A range of inclusive packages were on offer in summer 2004, including:

- hotel packages including two-nights accommodation with breakfast and a three-day park pass based on Disney-owned accommodation, ranging from £108 to £698 per adult depending on how many adults are travelling and when they are visiting;
- packages of a similar duration at non-Disney hotels around the resort ranged in summer 2004 from £102 to £782;
- transport-inclusive passes including the hotel/park entrance ticket as above, plus transport from the UK, for example.

In Disney-owned hotels, the prices for this ranged as follows:

- £243–1010 on Eurostar;
- £196–963, flights with Air France;
- £132–992, self-drive, via Dover-Calais ferry.

In addition, a late-booking fee of £25 was applied to all reservations made within seven days of the departure date.

The resort obviously offers a range of other services for which an extra payment is required, notably:

- Breakfasts with Disney characters which ranged from £12 for adults and £8 for children to £18 and £10 respectively.
- Pre-booked meal options, ranging from £14–19 per adult and £7 for children.

For pricing purposes, Disney classified children as being from three- to eleven-years old. In hotel-only packages, children paid from a standard £57 for the package regardless of the hotel used. These inclusive children's prices were a standard £147 regardless of the hotel used.

Place

Disneyland® Resort, Paris, distributes its products in a number of ways via travel agents, tour operators and its own website.

In its brochure it distributes its park product by working in partnership with intermediaries, including:

- local, non-Disney-owned hotels
- professional transport carriers such as Eurostar, P&O Ferries and Air France.

Their brochure encourages prospective visitors to contact their local travel agent but it also provides details of their website and the contact details for their telesales call centre, which is staffed seven days a week.

Promotion

Disneyland® Resort, Paris, obviously makes great use of a range of promotional techniques to sell itself, ranging from press and television advertising to press and public relations, and direct selling to group organisers and travel agents.

However, in its Official Holiday Brochure for Summer 2004, it also featured a number of special offers which appeared to have three main objectives, namely:

- to encourage people to book in advance, and to book early
- to increase visitor spending
- to attract off-peak season business.

Some examples of the offers may illustrate this as follows:

- (i) offering four nights for the price of three for weeks in April to July and September, but not in the peak month of August;
- (ii) hotel upgrades, guaranteed for those booking for June and July by 1 April 2004;
- (iii) a 15 per cent discount on 'Buffalo Bill' Wild West Show, including a meal.

Each offer carries conditions as one might expect, although they are generally not too restrictive.

In addition, Disneyland® Resort, Paris, Hotel also offers special joint promotions with certain partners. For example, the Summer 2004 Official Holiday Brochure contains details of the 'Visa Privilege Programme' in collaboration with Visa credit cards. If customers used their Visa Platinum (the highest level available) credit card to pay for their Disneyland® Resort Package, they received a voucher entitling them to discounts at the Disneyland® Resort. However, the offer was only available at the more up-scale Disneyland® Resort Hotels.

At the same time, Disneyland® Resort, Paris, promotes itself in partnership with other well-known brands from Europe and the USA. Its 2004 Official Holiday Brochure, for instance, noted its 'official partners' as Coca-Cola, Esso, France Telecom, Hambro, Hertz, DBM, Kelloggs, Kodak, McDonald's, Nestlé, Vauxhall and Visa.

The brochure itself is a high quality production with the emphasis on photographs showing families enjoying the resort and park together. Interestingly, but not usually for tourism brochures in Europe, most families had only one or two children and the families were all white with no people of any other ethnic origin featured.

Finally, the brochure was detailed and clearly written and all conditions/restrictions of prices and special offers were clearly highlighted.

Conclusion

Disneyland® Resort, Paris, is a very professionally marketed, multifaceted product at the higher end of the market, price-wise. Its 2004 Official Holiday Brochure offered a wide range of packages for prospective visitors, together with many special offers. It also emphasised the resort partnerships

with other leading brands, from credit card companies to airlines.

Discussion points and essay questions

1. Compare and contrast the marketing of Disneyland® Resort, Paris, with that of a major visitor attraction in your country, noting the differences.
2. Critically evaluate the potential benefits for Disneyland® Resort, Paris, of its partnerships with brands such as Visa, Vauxhall, Kodak and France Telecom.
3. Discuss the relative importance of each of the 4 Ps – product, price, place and promotion in the marketing of Disneyland® Resort, Paris.

Exercise

Select a major visitor attraction in your own country. For your chosen attraction you should produce a short report, highlighting how it could 'add value' to its core product in the way that Disneyland® Resort, Paris, does.

Case study 3

Modern art museums

In the world of leisure attractions, it seems that few have reached the scale and sophistication in marketing as that practised by many modern art museums. Public interest in recent years seems to have grown enormously around the world with new museums opening all the time and plenty of visitors wanting to visit them. In this case study, we will look at some of the leading 'brands' in the modern art museum sector, for there are now several such powerful brands.

1. *Guggenheim Museums*

This is perhaps the world's leading brand of art museums with a history which dates back to the late 1930s. The story of this phenomenon in the art world is outlined in the following extract from one of the Guggenheim Museum's websites.

The Guggenheim Museum began with the vision of Solomon R. Guggenheim, heir to an American mining fortune and an enthusiastic patron of the arts. In 1929, Guggenheim enlisted the guidance of German baroness Hilla Rebay, an advocate of innovative and experimental art, and was able to amass a major collection of contemporary European painting. Many of the abstract paintings in this collection became available for public view in 1939 when Guggenheim created the Museum of Non-Objective Painting, housed in a former automobile showroom in New York City. Plans for a permanent home for the collection began in 1943 and in 1959 the renamed Solomon R. Guggenheim Museum opened in the landmark Frank Lloyd Wright building on Fifth Avenue at 89th Street.

Under the leadership of museum directors James Johnson Sweeney, Thomas Messer, and Thomas Krens, the collection has broadened to encompass myriad movements of Modern and contemporary art in virtually every medium. The Solomon R. Guggenheim Foundation now incorp-

orates the important collections of several discerning patrons, including the 20th-century paintings and sculpture owned by Peggy Guggenheim, niece of Solomon R. Guggenheim; the Justin K Thannhauser collection of Impressionist, Post-Impressionist, and School of Paris masterpieces; and Guiseppe Panza di Biumo's outstanding group of Minimal and Conceptual artworks. As distinctive as the art itself – indeed, works of art themselves – are the buildings designed to house it. The name Guggenheim has become synonymous with the innovative structures by Frank Lloyd Wright in New York, by Frank O. Gehry in Bilbao, and by Rem Koolhaas in Las Vegas. Now an international constellation of museums in New York, Venice, Bilbao, Berlin, and now Las Vegas, the Guggenheim Museum brings its extraordinary collections to a worldwide audience.
www.guggenheimlasvegas

Each Guggenheim has its own distinctive character and style.

The Venice museum is known as the Peggy Guggenheim Museum and is located in a historic canalside building. It has a programme of temporary exhibitions and has a large shop, which is next door to the main museum. This shop, in addition to the normal range of souvenirs, sells copies of the sunglasses and shoes which Peggy Guggenheim used to wear.

The museum is open six days a week and opens one night a week until 10.00 pm in the summer. Admissions in 2003 cost 8 Euros per adult but with free entry being offered to members of a number of bodies including Members of the Guggenheim Museum Organisation and the Freccia Alata Club of Alitalia, for example. The museum café is owned by a famous local restaurant, the 'Ai Gondolier'.

The museum building was quite small, but in 2003 a new building was opened to increase the size of the museum, details of which are

included in the following extract from the museum's website.

The expansion of the Peggy Guggenheim collection on the site of Palazzo Venier dei Leioni makes important progress this fall with the opening of a converted property on the southeast corner, at number 704 Dorsoduro, overlooking the Rio delle Torresselle.

Growing attendance and manifold exhibitions, events and programmes [two or more temporary exhibitions per year, didactic activities for children, programmes for members, garden concerts, etc.] have made compelling the need to increase public space and improve visitor services at the Peggy Guggenheim Collection. The new property brings new benefits and facilities: a sculpture court [166 sq.m], an entrance foyer and checkroom facilities, a new museum shop [two rooms], exhibition space [100 sq.m.], public bathrooms [8] and improved wheelchair access.

The new property provides access to the museum via a single large foyer [replacing the two small entrances currently operative], with furnishings designed and constructed by **Progetto Lissone**, which have the capacity to process the museum's 300,000 visitors per annum. The opening of the new shop enables the former shop to be converted for temporary exhibition use. Two new exhibition galleries are linked to the existing spaces and make possible larger exhibitions or concurrent small-and medium-sized exhibitions. The opening of the new entrance has seen the introduction of electronic ticketing and of a new generation of audioguides provided by 'acoustiguide'. The additional restrooms better serve the museum's visitors who have more than doubled in number over the past ten years [currently ca. 300,000 visitors per year] and facilitate access for visitors in wheelchairs.

www.guggenheim-venice.it

In 1997, the Guggenheim Foundation opened a museum in Bilbao, Spain, in a joint venture with the Basque authorities to help rejuvenate the city. Horner and Swarbrooke have identified some of the key features of this museum, as follows:

- Its opening has helped Spain as a whole to further its strategy of developing other forms of tourism so as to reduce its dependence on mass market coastal tourism.
- The new museum has put Bilbao on the international tourist map as a short break destination for cultural tourists.
- The museum has helped improve the image of the city which was previously seen as a rather economically depressed and unattractive place.
- The development of the Guggenheim is an example of a partnership between the regional government of an area with a distinctive culture and an international charitable foundation.
- The motivation for attracting the Guggenheim Museum to Bilbao was clearly wider than just the desire to develop tourism in the city. It was also about projecting an image of a modern, dynamic region to the wider world.
- The design of the museum was deliberately intended to be unforgettable, to make a bold artistic statement about both the Guggenheim Foundation and the city of Bilbao.
- The museum follows the fashion of many such institutions by placing a great emphasis on income from retailing and on merchandising in general.
- As the museum evolves, it will be interesting to see what percentage of the visitors are local people and how these local people view the museum.
- It will be interesting to see how visitor numbers develop over time and to see if the Guggenheim will be able to continue to attract first-time visitors.
- It will also be fascinating to find out the extent to which the museum brings benefits to the city as a whole or whether it will remain an isolated phenomena.
- The museum appears to have been successful in spite of being isolated in a region which has experienced terrorist attacks over a period of time.
- Much of the success of the museum probably stems from the fact that it has a famous 'brand' name that is world renowned in the art museum world.
- The success is also partly due to the fact that the Guggenheim organisation is well funded and highly experienced in managing museums.

Horner and Swarbrooke, 2004

Perhaps the most innovative museum bearing the Guggenheim name is the one located in Las Vegas. This is interesting from two points of view, namely:

- (i) it is located within a hotel, the Venetian Resort Hotel-Casino
- (ii) it is a joint venture with the world famous Hermitage Museum in St Petersburg in Russia, and it displays some works from this great collection.

However, in 2003 the main Guggenheim museum was closed and only the 'Jewel Box' Guggenheim-Heritage Exhibition remains although this has been a success.

The Guggenheim museums are an excellent example of a major American phenomenon, well-endowed charity foundation owning and running major museums, but it is unusual in having exported its 'brand' to Europe.

2. *Tate Galleries, UK*

There are four Tate Galleries in the UK, as follows:

- (i) Tate Britain, the national gallery of British Art over the past 500 years
- (ii) Tate Modern, a modern and contemporary art gallery in London
- (iii) Tate Liverpool, the largest modern art museum outside London
- (iv) Tate St Ives, a museum of modern and contemporary art in a Cornish coastal town which is famous for its connections with British sculpture.

All Tate galleries are free due to the subsidies they receive from the UK government, but donations are accepted and indeed welcomed. The galleries offer a good education service and they all endeavour to earn more from their retail and catering activities. They are also keen to attract corporate hospitality events because of the income they generate.

3. *Museum of Modern Art (MOMA), New York*

Some argue that New York's Museum of Modern Art, with its 'MOMA' brand, created in 1929, is the foremost modern art museum in the world. It is a charitable educational that is committed to making modern art accessible to the population.

The entrance fee for visitors in 2003 was US\$12, but it was free for children, and on Sundays, in the evening, the museum let people enter on a 'pay what you wish' basis. Unlike other museums, MOMA does not promote its café very strongly, although it did promote,

on its website, its online retailing operation. Website information on the museum was available in late 2003 in English, French, Italian, Spanish, Japanese, German, Chinese and Korean but its audio tour was only available in English. MOMA also promoted its education service on its website together with its publications and research reviews. Overall, it seems less commercially minded and more educationally focused than the Tate and Guggenheim museums.

4. *Centre Pompidou, Paris*

This pioneering modern art centre is now over 30-years old although it underwent a major refurbishment for the millennium. A state project, it was named after the president of France, at that time a lover of modern art and culture. The Pompidou Centre is popular with Parisiens as well as tourists and is open between ten and eleven hours every day except Tuesday. The Centre places a great emphasis on encouraging children to appreciate art, with a special Children's Gallery, aimed at young people visiting with schools or their parents. It runs a lot of workshops and events for both adults and children. The dramatic building itself remains a symbol of Paris around the world.

Conclusion

Modern art museums are very popular today and are the cornerstone of the tourism product in many countries, particularly in the USA and Europe. They are often run by rich private charitable foundations or governments, and are becoming increasingly commercialised as they seek to increase their income to support their activities. It remains to be seen if this phenomenon will be a passing fashion or become a permanent feature of the leisure market.

These examples, together with the other leading modern art museums such as the Guggenheim Museum in Lisbon, seem to suggest that modern art museums today tend to:

- be located in the USA and Europe primarily;
- be owned by charitable foundations in the USA, while in Europe, the government often owns, or at least funds, most of these museums;
- place emphasis on earning extra income from retailing and catering;

- arrange temporary exhibits at these museums which can become major attractions for tourists in the cities where they are located;
- not only appeal to a range of age groups, but also place a great emphasis on education visits by school children.

Discussion points and questions

1. Discuss the advantages and disadvantages of modern art museums being owned by private charitable foundations and governments, respectively.

2. Discuss the reasons why you believe modern art museums have become so popular in recent years.
3. Discuss why you think there are relatively few modern art museums currently in Asia, South America and Africa.

Exercise

Access the website of a range of modern art museums around the world. You should then produce a report highlighting the differences between your selected museums in terms of product and price.

Case study 4

Health, leisure and tourism marketing

There is no doubt that more people than ever before are concerned about their health, most notably in the so-called developed countries. This concern manifests itself in everyday life in terms of everything from leisure club membership to the purchase of diet food and drink products.

However, in recent years, the tourism industry has recognised the growing potential of this interest in health as a potentially lucrative market to be exploited.

In this case study, we will explore the links between health, leisure and tourism by looking at:

- the health and beauty market in the UK;
- spa hotels around the world.

Health and leisure: the health and beauty market in the UK

The health and beauty market is highly developed in the UK, by international standards. An interesting report on this subject published by Mintel in 2003 analysed both the supply and the demand side of this market. From this report and the author's own research come some interesting points, notably:

- (i) In the UK the concern is less with 'serious' medical health matters than with the 'softer' question of 'health and beauty'. This is in contrast with other countries, particularly the former Communist countries of Eastern Europe.
 - (ii) The market is generally seen to be predominantly female but there is a belief that demand for health and beauty will grow amongst men in the future.
 - (iii) Some elements of the market are highly seasonal, such as the desire to look good in time for Christmas and summer holidays.
 - (iv) In the UK market, at least, attention to health are linked closely to broader aspects of a person's personal appearance. This can include looking younger than one's age.
 - (v) While concerns over health are thought to be growing, a recent survey by TGI showed some interesting results, as shown in Exhibit 4.1.
- According to the survey, if we look at those who 'definitely agree' with these statements, male and female interest in health issues seems actually to have fallen a little between 1998 and 2002. At the same time in any event, interest is not particularly high, with only 14 per cent of women (15 per cent of men) definitely agreeing with the statement that 'I make sure I take regular exercise'.
- (vi) Nevertheless, Mintel found that at the beginning of 2003 there were a number of specialist chains meeting the needs of the UK health and beauty at the local beauty salons and health and fitness clubs. Some of these were controlled by large companies which own chains of units such as Body Care International with over 100 'Tanning Shops' and Fitness First plc and the Esporta Group Ltd. Likewise, major brand names from other industries are entering the health market, such as Virgin.
 - (vii) Hotels also play a large role in the UK health and beauty market, not only through services offered to overnight guests, but also through their leisure clubs which are open to local people to join. A good example of this phenomenon are the 'Living Well' clubs found in Hilton Hotels in the UK. In recent years, health and beauty facilities have become a major way in which hotel chains have sought to achieve an advantage over their competitors.
 - (viii) The UK has also developed a rather different form of hotel-based health and beauty concept than any other countries, namely the 'health farm'. These tend to combine beauty treatments and pampering with exercise and dieting. Some major brand names in this field include Champneys and Ragdale Hall.
 - (ix) In recent years, the hotels with leisure clubs and the 'health farms' have tried to evolve and rebrand themselves as 'hydros' or 'spas', the latter a term used widely around the world.

Exhibit 4.1

Trends in attitudes towards health, personal appearance and gender, 1998 and 2002 (Base: adults aged 15+)

Women	1998	2002
Definitely agree	%	%
It is important to keep looking young	15.1	13.8
It is important to me to look well dressed	18.3	18.7
Most of the time I am trying to lose weight	14.8	14.0
I should do a lot more about my health	15.9	12.7
I always think of the calories in what I eat	7.1	6.4
I make sure I take regular exercise	14.1	14.0
Men		
It is important to keep looking young	9.9	8.7
It is important to me to look well dressed	14.9	16.3
Most of the time I am trying to lose weight	6.0	4.9
I should do a lot more about my health	14.1	12.0
I always think of the calories in what I eat	3.2	3.1
I make sure I take regular exercise	15.6	14.8

(Source: TGI/Mintel, 2003)

(x) This is a very fashion-conscious market where treatments and therapies, together with health clubs and beauty parlours, come in and out of fashion.

Health and tourism: spa hotels and the world

It would be wrong to suggest that health-based tourism is a new phenomenon, for visiting spas, bathing for medicinal reasons, is a practice that dates back several centuries, in Europe at least.

However, the links between health and tourism today are numerous and varied, and include:

- trips taken to other countries for surgery and medical treatment to cure illness or disease;
- trips taken to other countries for cosmetic surgery;
- longer-term trips to mountain or seaside sanatoria to improve the health of patients suffering from illness exacerbated or caused by environmental problems in their own home area;

- trips designed to tackle stress and thus improve the mental and psychological health of the traveller;
- general health and beauty trips.

The concept of spas is an old one, which began with mineral waters emerging from the earth, which were meant to have beneficial effects on health. These grew into resorts where visitors came not only for health treatments but also for a good social life, entertainment and good living. In some countries, spas like these are still seen as an essential part of state health care, often being subsidised by the government and staffed by qualified medical personnel.

However, in recent years the concept of the 'spa' has also been adopted by hotels and resort complexes in many countries which have endeavoured to become like spa resorts, but on one site only and owned by one organisation only.

These spa hotels and resorts come in a variety of forms. Below, the authors offer descriptions of several of them, taken from the website of a consortium called 'Great Hotels of the World' in late 2003.

Chiva-Som International Health Resort

Chiva-Som, or 'haven of life', is situated in 2.8 hectares on the exclusive royal beach of Hua Hin. Its philosophy is to achieve harmony between the mind, body and spirit with spa treatments that are complemented by holistic and fitness treatments. The ravishing retreat is a cluster of Thai-inspired guest pavilions and rooms surrounded by waterfalls, lakes and tropical gardens, overlooking the Gulf of Thailand. Requests can be made for non-allergenic pillows or flower arrangements.

Chiva-Som presents gourmet cuisine created by a unique team of Thai and international master chefs. All the delicious, low-calorie Asian and western specialities are prepared with fresh, wholesome produce from the resort's own organic herb, fruit and vegetable gardens.

Chiva-Som's ultra modern spa boasts over 100 traditional and alternative therapies as well as luxurious beauty treatments that utilise essential oils, Thai herbs, flowers and botanicals. There are many fitness activities including t'ai chi, yoga, pilates, health and beauty workshops and holistic programmes that incorporate forms of traditional Chinese medicine. Diverse facilities include a jacuzzi, aquatic therapy pool, exercise pool, sauna, flotation room, multi-level steam room and 42 treatment rooms including outdoor massage pavilions, Thai massage pavilions, beauty rooms and five for consultations. An initial Health and Wellness consultation with a dedicated Chiva-Som professional is available to guests to help them select and design a personalised treatments programme.

The new Chiva-Som Spa Suite – This suite has been designed so that each person can experience the treatments they ideally need whilst still enjoying the Chiva-Som experience together. Simultaneously, one partner could experience a Thai Fruit Wrap whilst beside them their partner is experiencing a Thai Honey Glow. A range of refreshments including lemongrass tea, a whole menu of juices and teas, as well as a light meal may well be served to guests whilst they are totally indulged in such an intimate setting. A wide choice of music is also privately controlled within the suite, allowing couples to personalise their environment whilst relaxing and enjoying their treatments.

Begawan Giri Estate

Begawan Giri Estate is a secluded, luxury resort set amidst the serenity of Bali's famed rice fields, lush tropical greenery and mist-shrouded mountains. Spread across eight hectares of landscaped gardens are the property's five elegant residences, comprising 22 well-appointed suites, named after the elements of fire, wind, water, forest and earth. Villas occupy the western slope of the property and feature their own swimming pools, kitchen, living and dining areas. A personal butler and his/her team serve every residence. An eight-to-one staff-to-guest ration assures you of impeccable service, warm and unhurried.

The Source, Begawan Giri Estate's unique health spa, is no ordinary spa. Here, you have the natural benefits of tropical gardens, mountain air and holy spring waters. The spa maintains a holistic approach to physical and spiritual well-being. Body treatments such as massages, skin scrubs and other rituals are founded on ancient or traditional methods and use natural ingredients in oils, lotions and herbal preparations. You can enjoy a Balinese massage with aromatic oils, or exotic treatments such as Javanese Mandi Lulur and Bali Boreh Spice. The Source further appeals to the senses with a selection of baths and wraps created from volcanic clays, sea salts, flowers and indigenous plants. Experienced staff are on hand to pamper guests thoroughly, but the focus remains on simplicity, balance and a return to nature. Healing retreats centred around The Source are also available.

Kumarakom Lake Resort

The Spa – Kerala has a rich tradition in Ayurveda, a traditional Indian system of holistic and natural healing that has evolved over the past 5000 years. Ayurveda states that diseases are caused by disturbances in one's equilibrium, which is maintained by three dishes, Vata, Pitha and Kapha. Treatment is administered to correct the imbalanced dosha. Kumarakom's Ayurvedic health centre, Ayurmana, offers a variety of rejuvenation and healing packages. Consult the house physician to gain relief from conditions such as high blood pressure, arthritis, obesity, stress, asthma and migraine. Or, indulge in one of the health and beauty treatments such as an Essence of Earth facial. Select from a choice of

sandal, basil, honey, aloe, almond, and citrus. The signature Ayurvedic Facial involves the use of a combination of fruits and rare herbs to enhance the complexion.

Little Palm Island Resort and Spa

Little Palm Island Resort and Spa is the perfect destination for those seeking a combination of tropical surroundings, deluxe accommodations, the finest cuisine and a world-class spa. Spa Terre, located on a private island, the exclusive resort caters for only 30 couples ensuring a secluded, private feeling. All thatched-roof suites boast a king-sized bed, separate living room, jacuzzi whirlpool bath and private indoor and outdoor showers. Guests can relax on their private balconies complete with oceanfront views and make good use of the bird guide and binoculars in each suite. To ensure a peaceful environment, there are no televisions, telephones or alarm clocks in the suites. Children under the age of 16 are not permitted.

Created for self-indulgence, Spa Terre is one of only 13 in the USA that features Indonesian rituals including the Javanese Lulur Royal Treatment and the Bali Sea Ritual. These are the perfect choices for those who want to combine a celebration of tradition with a memorable spa visit. The philosophy behind this unique spa is to provide guests with a cross-cultural experience. Asian cultures have a strong influence because of their long tradition of using healing spices and flowers as remedies.

The signature treatment is the Balinese Massage, which combines a variety of techniques and tempos including acupressure to invigorate the muscles and increase blood circulation. Other popular choices include a Milk and Honey Body Treatment and Table Thai Massage.

Le Montreux Palace

Set close to the lake, the glorious Montreux Palace overlooks the mighty Alps to the south. Built in 1906, the hotel is a gem of art nouveau architecture at its most inspired and provides a vibrant Belle Epoque ambience of style and grace. The setting is quite simply perfect, whether guests simply want to relax or to enjoy a wealth of cultural and sporting experiences.

With remarkable panache, Le Montreux Palace and its first-rate team manage to combine the good taste of a bygone age with the comfort and amenities required to meet today's high expectations. In October 2002, the hotel opened a state-of-the-art Amrita Wellness Centre specialising in massages and other treatments to aid relaxation.

The exclusive, state-of-the-art Amrita Wellness complex offers an idyllic setting on the shores of Lake Geneva with breathtaking views over the lake and Alps. It follows an integrated approach that combines fitness, relaxation, treatments and nutrition advice. Amongst the signature treatments is the Ayurvedic massage, which provides deep relaxation, detoxification and rejuvenation. It includes a gentle full body massage with a herbal oil according to your consultation, followed by a Shirodhara [the flow of sesame oil to the forehead]. Also an aid to deep relaxation, the Amrita foot and legs treatment includes a revitalising foot scrub, a gentle massage with essential oils for the legs and feet followed by a foot wrap with mineral extracts.

The Western Cape Hotel and Spa

The exclusive five-star Western Cape Hotel and Spa is situated on the Arabella Country Estate next to Southern Africa's largest and most beautiful natural lagoon. The resort offers a safe and secure, unsurpassed lifestyle experience that blends integrally with the surrounding protected biosphere environment.

As the premier spa and wellness location in South Africa, the Altira SPA features several luxurious regenerative and therapeutic treatments. These comprise high-quality advanced skin and body therapies. Indulge physically and mentally, and learn the meaning of self-nurturing. A qualified spa team is dedicated to excellence and customer service, and is served by the latest equipment and technology. Try the unique treatment of Rassoul, a ceremonial interpretation of health, skincare and beauty from the ancient Orient. The basis of Rassoul is the integration of different elements: water, fire, earth and light. For a more specialised choice, opt for the Multi-vitamin Power Treatment that targets the various causes of premature ageing. Alternatively, select the Ancient Sea Mineral Vichy for total relaxation and detoxification.

Le Royal Meridien Beach Resort and Spa

Le Royal Meridien Beach Resort and Spa lies on a pristine stretch of sand on Jumeirah Beach overlooking the clear, blue, warm waters of the Arabian Gulf, where modern sophistication and ancient civilisation blend together. Set in landscaped gardens, it is a true oasis with heated outdoor swimming pools and a Roman fantasy spa inside. Le Royal Meridien was voted as 'The Best Spa' and 'The Best Hotel Design Project' in the Middle East. It was also highly commended in 'The Best Environmentally Friendly Hotel' and the 'Best Restaurant Innovation'.

The Caracella Spa is situated in the royal tower, in a naturally lit atrium and has six therapy rooms with treatments including massage, body wraps, facials, seaweed therapy, balneotherapy, aromatherapy and beauty treatments to soothe the body and soul. There are five Hammam pools ranging between 18 and 38 °C [60–106 °F] housed in a Roman-themed bathing room decorated with murals, to de-stress, unwind and enhance circulation and well-being. Plus, there is a sauna, steam room and jacuzzi. The toning cellulite treatment is hands-on, relaxing and totally luxurious. This involves body brushing to stimulate the circulation, then a mixture of algae and detoxing pure lime and juniper essential oils are massaged over the body. The guest is wrapped in foil, which warms the system and helps to absorb

the nutrients and flush out waste. During the treatment, there is a scalp and foot massage and, after showering, a back massage.

Paraiso de la Bonita Resort and Thalasso

Set within its own ecological reserve on Mexico's Mayan Riviera, Paraiso de la Bonita is the first thalassotherapy spa resort in Mexico and only the second of its kind in Latin America. The 3000 sq. ft. Bali Suite, the *crème de la crème* of the resort, is decorated with antiques and fabrics from Indonesia. Designed and built by a Mexican architect, the resort features traditional Mayan decorations including Manoseado plastered walls, colonial archways, decorative ironwork and mosaic walkways, along with added influences from other continents.

Created exclusively for relaxation, Paraiso de la Bonita's Thalasso Centre features an impressive range of innovative therapies and the very latest in beauty treatments including Thalassotherapy. This luxurious spa includes a hydrotherapy treatment area with hydro-massage, jet baths, showers and a hydrotherapy pool. All the treatments are performed using seawater, which is pumped directly from the ocean. Lymphatic Drainage, Sport and Swedish massages are all available. Couples can enjoy a relaxing massage session in their own private room if they prefer.

From this brief selection of spa resorts around the world, we can make several general points, namely:

- some focus wholly on health as the core of the product while for others, such as the Le Meridien in Dubai, health and beauty is an important addition to the normal services of a conventional high quality business hotel;
- many of the spa hotels link health to beauty and also the desire to be in beautiful locations with the ability to observe wildlife and so on;
- a number of spas stress the idea of taking guests 'back to nature' but offer all the modern luxuries and services expected by the affluent tourist;
- many spas promote 'holistic approaches' to health which are mystical and almost seen as religious. They often try to tempt 'western' tourists with the suggestion that they will dis-

cover 'secrets' from ancient, predominantly Asian, cultures;

- spas are often luxurious and emphasise their exclusivity;
- most spas focus on both physical health and mental well-being and relaxation, seeing the two as inextricably linked;
- a number of spas explicitly make the connection between healthy eating and healthy living, and some stress the organic nature of the food served in their restaurants;
- some spas make an overt link between health and romance with some, even being adult or couples only to enhance the romantic nature of the experience.

However, as the number of spa hotels and resorts grows, they are continually searching for ways to differentiate themselves from their competitors so they may gain competitive advantage. This

differentiation can be based on a number of different characteristics, notably:

- their target market – families, couples, trendy people, particular nationalities;
- their locations – rural, mountain, coastal, jungle;
- their treatments – the range and types on offer;
- their ethos or philosophy – holistic, ‘new age’, environmentally friendly, natural.

In terms of marketing, these spa resorts are an excellent example of the concept of psychographic segmentation. They are clearly aimed at consumers with particular lifestyles and personalities.

Their promotion is often highly aspirational and targeting the ego of the potential customer. For example, entries of a number of spa hotels on the ‘Great Hotels of the World’ consortium website talk about the resort as follows:

- ‘appealing to a discriminating, international clientele seeking seclusion, relaxation, fine dining, and attentive services’ (La Sumanna, French West Indies);
- ‘Classified as a heritage property... the resort offers a fairytale setting on the banks of the picturesque (lake) which is swept by the intoxicating fragrance of spices’ (Kumarakom Lake Resort, Kerala, India);
- ‘Chiva-Som, or haven of life... (aims) to achieve harmony between mind, body and spirit with spa treatments that are complemented by holistic and fitness treatments. The ravishing retreat is a cluster of Thai-inspired guest pavilions’ (Chiva-Som International Health Resort, Thailand).

Conclusion

Health is a growing concern amongst people all over the world, in general, today. However, it is only in the most developed economies that it has yet become a well-established element of the leisure and tourism markets.

In terms of leisure and tourism industry provision, health is often viewed in different ways

between countries and cultures, and is often linked with beauty and personal appearance, as well as being concerned with either physical or mental health, or both.

Health, and leisure and tourism are also at the forefront of development in marketing theory in terms of being an example of modern psychographic segmentation, for example.

It is also a good illustration of the growing ‘internationalisation’ of the leisure and tourism markets in two main ways, namely:

- the use of health and beauty by Asian destinations, for example, to attract European and American tourists;
- the emphasising of treatments originating in foreign countries – Swedish and Thai massages, for example – as if these are better than domestic treatments.

Finally, it seems likely that health, leisure and health-based tourism will continue to grow in the foreseeable future, and that it will slowly spread to more and more countries of the world.

Discussion points and exercises

1. Discuss the reasons why many commentators may feel the interest in health and beauty will grow in the future.
2. Critically evaluate the products and services offered by the spa hotels featured in this case study and discuss the extent to which they encourage healthy living.
3. Discuss the ways in which health tourism may develop around the world over the next ten years or so.

Exercise

You should choose a health and fitness club *or* a spa hotel. For your selected club or hotel, you should endeavour to carry out a SWOT Analysis for it and suggest strategies it may wish to pursue in the future to achieve competitive advantage.

Case study 5

Manchester United: Marketing the brand

Soccer today is big business worldwide and nowhere is this fact more clearly illustrated than in the case of Manchester United Football Club. Today this team is a world-famous brand and marketers are constantly seeking ways of raising the profile of the brand ever further and using it to increase income for the company that owns the football team. In this case study we will explore some of the ways in which Manchester United is marketed, as a brand.

It is important to recognise that Manchester United is a public limited company, or plc, which was first launched on the London Stock Exchange in 1991. It is, therefore, answerable to its shareholders and has to be successful financially.

Currently, Manchester United is perhaps the most successful team in any sport in the world, with supporters all over the planet.

The organisation has been very successful at exploiting the brand, as can be seen from the following examples taken from the official club website:

- (i) A major on-site shop or 'Megastore' which also sells a huge range of merchandise online.
- (ii) An 'Official Membership Scheme', 'One United' which is described in the following terms on the website:

Formation

You can become a *Match Member* for £22. As a Match Member you will get the chance to apply for match tickets plus loads of exclusive benefits. Alternatively you can become a non-ticket Member for £11, and still get some exclusive United benefits.

We also offer *Junior Match Memberships* for £14 which are specially tailored according to age group, either under-10s or 11–16s. Alternatively you can become a non-ticket Junior Member for £11 and get the same benefits as the Adult Members.

When you sign as a *Match Member* or *Junior Match Member* of *One United* Adults and Juniors both get:

- The chance to apply for home game match tickets
- Exclusive Members' Review magazines
- One United Membership Card for the 2003/2004 Season
- Free admission to home reserve games
- The chance to watch the team train for free at Old Trafford
- Exclusive members-only competitions to watch the team train at Carrington
- Vote for your Player of the Year and win the chance to present the trophy to the winning player
- Automatic entrance into 2 prize draws to be a club mascot.

Plus, Adults get:

- The chance to win match tickets and travel to Champions League away game
- Members only Yearbook and Premier League Guide
- If you take out car insurance with Manchester United Insurance we'll take the price of your club membership off your premium (UK only).

And Juniors get:

- An exclusive Superstars book of United Player profiles
- A members-only Man Utd poster
- A United Activity Book (under-10s only)
- A Members-only Yearbook (11–16s only).

Member

If Match Membership isn't right for you, we also offer the chance to join as a Member, or, if you are under 16, a Junior Member for £11. As a Member or Junior Member you won't be able to apply for match tickets, but you'll still get some exclusive benefits, including the following:

- One United Membership Card for the 2003/2004 Season
- Exclusive Members' Review end of season magazine

- Vote for your Player of the Year and win the chance to present the trophy to the winning player
- Free admission to home reserve games
- The chance to watch the team train for free at Old Trafford
- 10% Megastore and Red Cafe discount
- 50% Old Trafford Museum and Stadium Tour discount
- If you take out car insurance with Manchester United Insurance, we'll take the price of your Adult Membership off your premium (UK only).

Membership

Whichever type of membership you choose you'll automatically become an E-Member for free. As well as the basic E-Membership package you'll get E-Membership Plus, giving you access to all the latest match info and club news as it happens.

As soon as you get your membership number you'll be able to visit ManUtd.com, register and start enjoying your E-Membership benefits. So, as well as everything you receive when you sign as a Match Member or a Member, you'll also get the following:

- Exclusive members only weekly e-newsletter
 - Access to Freeview online video content (MU.tv Channel 1)
 - Up-to-the-minute e-views from Fergie
 - The inside track with player interviews
 - An Old Trafford stats pack
 - Exclusive members-only online news and *views@www.Manutd.com*.
www.manutd.com/supportersunited
- (iii) MUTV, the club's official satellite channel which is a joint venture with Granada and British Sky Broadcasting.
- (iv) MU Finance, a branded operation which offers everything from home and travel insurance to mortgages to savings schemes.
- (v) A range of relationships with well-known companies such as online betting with Ladbrokes and holiday bookings via Travelcare Direct. These relationships are mutually beneficial to both Manchester United and its partner brands.
- (vi) MU Mobile, which brings Manchester United features to the phones of the fans including news flashes, ticket information,

the manager's pre-match press conferences, special ring tones and lyrics, and so on.

- (vii) Corporate hospitality facilities at the stadium.
- (viii) Running trips for fans to away games in the UK and abroad.

All of these activities are clearly about exploiting the club brand for financial gain.

However, the club has also used the power of its brand to help good causes. For example, it has been a supporter of the UNICEF campaign to end child exploitation.

Manchester United has, over the years, developed awareness of its brand around the world through tours and the exploitation of the fame of its players such as David Beckham. Indeed, the majority of Manchester United fans now probably live outside the UK.

The club has also sought to raise its international profile, and boost its income, through its highly publicised marketing alliance with the US baseball team, the New York Yankees, which was created in 2001.

However, when a club like Manchester United has worked so hard to create a successful brand, it has to protect this brand, not only for its supporters, but more importantly for its shareholders. With this in mind, Manchester United has had to handle some major public relations challenges in recent years, including:

- the Club's decision several years ago not to take part in the FA Cup, in the UK, so it could focus on overseas competitions, which gave rise to negative reaction in the UK;
- the news that its star player, David Beckham, was moving to Real Madrid in 2003, which gave rise to the fear that this might raise the profile of the Real Madrid brand internationally, particularly in Japan, at the expense of Manchester United;
- the controversy surrounding Rio Ferdinand and a drugs test in 2003.

All such image and public relations issues are important for a public limited company because they can affect share prices and the value of the company.

As if evidence were needed that soccer clubs are first and foremost just businesses in today's world, stories which appeared in the media in September 2003 provided it. The BBC news website reported that:

Manchester United has played down a press report that three foreign billionaires may launch bids to buy the club.

The Observer newspaper reported that three wealthy potential buyers had separately sounded out City advisors over whether a takeover bid would be successful.

The would-be buyers have not been identified, but are thought to include a Russian, a European, and a businessman of Middle Eastern origin.

They have been advised that the Premiership club would cost about £600 m (\$960 m) and that most of its existing shareholders would be willing to sell at the right price.

They have also been told that Manchester United – already among the most financially successful clubs in the English game – could become even more profitable, the Observer reported.

But Manchester United said it had had no contact with any potential buyer. The Observer report comes two months after the surprise £150 m takeover of Manchester United's Premiership rivals Chelsea by Russian Billionaire Roman Abramovich. Speculation that Manchester United could become a takeover target has been brewing since a separate group of wealthy investors began building up stakes in the club earlier this year. Manchester United's global profile, boosted by its consistently strong performance on the pitch and its roster of star players, is higher than any other football club's.

But with profits of £32 m on revenues of £146 m in its most recent financial year, the club is ranked as a medium-sized listed firm.

news.bbc.co.uk

The team is now beginning to make headlines as much for its business activities and its shareholders as for its activities on the soccer pitch.

Many fans of football in the UK are concerned about the growing commercialisation of their favourite clubs which they feel is leading to their interests being ignored and the clubs being run for the benefit of the investors. There are also those who are worried that a few high profile rich clubs

will dominate soccer in the UK while other clubs go bankrupt.

However, the opponents of this trend towards seeing soccer clubs, in the UK and elsewhere, as businesses appear to be fighting a losing battle. This trend has already been seen in baseball in the USA, and is even being seen in rugby in the UK. It seems like an inevitable development as are the increasing links between sporting brands and other major consumer brands which seek to benefit from the glamour of the sports club brands through sponsorship and partnerships. For example, Manchester United is sponsored by Vodafone, the mobile phone giant.

Finally, sporting clubs like Manchester United have become truly global brands and have been successful at using the process of globalisation for their own benefit.

Conclusion

Manchester United is, perhaps, the most successful sports club in the world with a brand which is recognised across the globe. At the same time, many fans of UK soccer feel more and more isolated from their favourite teams as they become brands managed by marketers for the benefit of investors rather than fans. This trend, no matter how unpopular it may appear, looks set to continue and likely to affect other sports too. Meanwhile Manchester United will wish to continue to perform well both on and off the field to prevent it losing ground to its competitors at home, and abroad.

Discussion points and questions

1. Discuss the reasons why some soccer clubs have become major internationally recognised brands and others have not.
2. Discuss the factors that could harm the reputation of a brand like Manchester United and reduce its commercial appeal to investors.
3. Critically evaluate the idea that the growth of branding and commercialisation in soccer in the UK is a threat to the future of the sport.

Exercise

Select a sports team or club. For your chosen organisation you should devise a plan designed to help raise its profile, create a strong brand and then exploit this brand for financial gain.

Case study 6

Sofitel hotels and resorts

Sofitel is the premium hotel brand of the leading global hotel chain, Accor. It is a luxury hotel product that seeks to offer personalised rather than standardised experience for guests. This case study, based on its 2003–2004 directory, looks at the Sofitel brand and how it is marketed as part of the Accor family of brands.

The first point to note is that, in the glossy and expensively produced 2003–2004 Directory, there were 189 Sofitel Hotels and Resorts listed, distributed around the world as follows:

Europe	99
South America	14
The Caribbean	6
North America	10
Africa	14
Middle East	16
Asia	21
Australasia and the Pacific Islands	9

The location of many Sofitel hotels reflect the fact that it is a French company, with linguistic links to the Old French Empire and the current overseas territories of France, including its heavy presence in Morocco, Vietnam and French Polynesia, for example.

It is also interesting to note that seventy-five of its hotels are located in mainland France itself, in other words, nearly 40 per cent of all its hotels.

Sofitel hotels tend to be in two types of location as follows:

- cities where the main clientele will be business people but with some leisure market;
- resorts in leisure tourism destinations, which may also attract some convention and incentive travel business.

Some indication of the future direction of the brand can be gained from the fact that of the next eight Sofitel units due to open, all of them bar one are in leisure tourism destinations, with three being in Egypt.

The Directory sets out what Sofitel believes distinguishes it from other luxury hotel brands, as the following extracts show:

‘Every Sofitel is unique, revealing the soul of the destination.’

‘Sofitel embodies the very best of France in the elegance of its interior design, the warmth of the welcome, the sophistication of the service and the exceptional cuisine.’

‘Sofitel guests are discerning voyagers who admire both culture and luxury, have a natural curiosity, particularly of fresh ideas and emerging trends.’

‘Sofitel, relegates standardised luxury to the past. One will never mistake the Sofitel hotel in Bangkok for establishments in say, New York or London.’

‘Sofitel has quite literally redefined the world of luxury hotels.’

‘Sofitel puts a human face on professionalism and efficiency.’

‘[with the staff] their singular skill lies in anticipation and attentiveness at every instant, never giving way to either the obsequiousness of another era or inappropriate familiarity.’

It is all about blending the best of traditional service with modern ideas.

The size and facilities of the hotels tend to vary depending on their location and target markets, understandably, as the following few examples illustrate:

- Sofitel Thalassa Miramar, in the stylish French resort of Biarritz, has a thalassotherapy and fitness centre, and offers cookery lessons given by the chef. This fits the image of Biarritz as a coastal resort, attracting upmarket clients concerned about their health. It also reflects the popularity of thalassotherapy in the French market.
- Sofitel Lyon Aéroport, France, is located within the actual airport building to make it as convenient as possible for its customers who are normally airline passengers in transit.
- Sofitel Capsis Palace Hotel, Greece – a large property set on its own private peninsula with private beaches and even its own zoo!

- It also claims to have more meeting rooms (110) than any other Mediterranean hotel.
- (iv) Sofitel Venezia, Italy, where the hotel is located directly on one of the major canals in this unique city.
 - (v) Sofitel, Bucharest, Romania, which is located in the World Trade Centre complex, reflecting the fact that most of its clientele will be business people.
 - (vi) Sofitel Santos Costa do Savipe, Bahia, Brazil – an ‘all suites’ hotel with exotic vegetation surrounding it and watersports available nearby.
 - (vii) Sofitel Nicolas de Ovondo, Dominican Republic – a historic building near all the main museums and named after its architect and the island’s third governor.
 - (viii) Sofitel Christopher, St. Barthelemy – a small 42-bed colonial-style hotel with views of desert islands, a tropical garden and a barbecue restaurant.
 - (ix) Sofitel Thalassa Mogador, Morocco, which has its own water sports centre, a fitness centre and Thalassotherapy Institute.
 - (x) Sofitel, Royal Golf el Jadida, Morocco, is located on a prestigious golf course and offers a free shuttle bus to the airport.
 - (xi) Sofitel Old Cataract, Aswan, Egypt – a legendary nineteenth-century hotel with a famous bar overlooking the River Nile, and connections with Agatha Christie, the crime novelist.
 - (xii) Sofitel, Hurghada, Egypt – a Red Sea coast resort on the edge of the desert with a private beach, children’s club, open-air theatre and discotheque, together with facilities for attractions such as horse riding and archery.
 - (xiii) Sofitel Royal Angkor, Cambodia – the nearest hotel to the Angkor temple, a World Heritage site, according to UNESCO.
 - (xiv) Sofitel Palm Resort, Malaysia – near an airport, a resort hotel surrounded by lush tropical gardens and a 54-hole golf course. The hotel has a business centre and an exotic spa.
 - (xv) Sofitel Reef Casino, Cairns, Australia, with its own nightclub and direct access to the Reef Casino.
 - (xvi) Sofitel Marura, Bora Bora, French Polynesia, built on an island which is a divers’ paradise, the hotel, it is claimed, was built following Dino de Laurentis’ initiative for the film, ‘*The Hurricane*’. The hotel also offers daily entertainment and excursions.

- (xvii) Sofitel Zhengzhan, China, next to the provincial government offices, has a beauty salon, nightclub and ‘Karaoke’ facilities.

Leisure facilities play a large part in all the hotels, both those within the hotel and those nearby that are accessible to guests.

Location is also a crucial issue in every hotel description whether this means on a beach, in a historic town centre or near to an airport or convention centre.

A significant amount of detail in each directory is also devoted to the restaurants in the hotel. These tend to fall into several types, as follows:

- French cuisine restaurants which tend to dominate in France, French-speaking countries and the USA.
- Restaurants based on local cuisine in the destination which tend to be particularly common in countries like Italy, China and the Middle East as a whole.
- ‘International’ cuisine restaurants in many destinations without widely recognised reputations for their national cuisine.

As far as the accommodation is concerned, the rise of nonsmoking rooms is an interesting issue, with the popularity of such rooms available tending to vary markedly between countries. For example, in terms of city business hotels in selected cities, the popularity of nonsmoking rooms available is as follows:

Beirut	0%
Dubai	0%
Jakarta	0%
Budapest	0%
Rio de Janeiro	0%
Tokyo	12%
Zhengzhan	13%
Lima	15%
Shanghai	17%
Jeddah	24%
Lisbon	32%
Vienna	47%
London	52%
Copenhagen	56%
Brussels	65%
Chicago	89%
New York	91%

The 0 per cent figures may reflect the lack of such rooms or the lack of information provided about them in the Directory.

There are also great differences in the proportion of rooms which have been specifically adapted for travellers with disabilities between the countries. In most countries, the proportion of such rooms is well under 1 per cent but again this may reflect hotels not submitting this information for inclusion in the Directory.

An interesting aspect of the Directory is that in a directory of luxury hotels there is a separate supplement entitled 'Awards, Stars, and Caps 2003–2004' which highlights the best hotel restaurants. The 2003–2004 supplement contained twenty-five such restaurants, of which 60 per cent were in France.

The Directory also includes details of other promotional initiatives designed to attract business to Sofitel hotels as follows:

- Sofitel leisure short break promotions such as the 'Sofitel Dream Package';
- the 'Sofitel Privilege Card' a brand loyalty reward scheme; one is free but there is also an 'Exclusive Gold Card' offering substantial benefits, which cost 230 Euros in 2003;
- 'Sofitel in the Skies' allowing guests to earn benefits from the frequent flyer programmes of ten leading airlines;
- a partnership with Europcar car hire, so guests have their car delivered to the hotel, as well as receiving a 10–15 per cent discount on rates;
- the dedicated Sofitel.com online reservation service.

At the end of the directory, as well as on the first page, the customer was told about the link between Sofitel and the broader Accor 'family' of brands. The text featured all the Accor brands, including other hotel brands, as well as the travel agency, casinos and meal voucher businesses. It claimed that Accor is much more than a group, it is a state of mind. The directory said 'Accor is

there to accompany you worldwide, throughout your journeys and your professional life'. It also noted Accor's support for the ethical tourism charter, supported by the French Ministry of Tourism. Finally, the directory gave details of the group-wide loyalty programme, 'Compliments from Accor Hotels', which also covers Sofitel.

Conclusion

Sofitel, while part of a huge tourism and hospitality corporation, Accor, has managed to create a clear brand identity for itself at the luxury end of the market. Its hotels are very individual and are located in both business and leisure destinations. They work hard at combining their French image with the locality in which they are situated. They also appear to be changing over time and becoming more leisure-oriented and more global in coverage.

Discussion points and questions

1. Compare and contrast Sofitel with other luxury hotel brands in the international tourism market.
2. Discuss the advantages and disadvantages of Sofitel being part of a large diverse hospitality and tourism corporation such as Accor.
3. Discuss the problems involved in developing a global luxury hotel business.

Exercise

Access the Sofitel online reservation service and that of several other luxury, mid-market and lower market brands. Compare each site in terms of ease of use and produce a report outlining your findings, noting particularly if the quality of the site reflects the quality of the hotel or not.

Case study 7

‘Souljourn’ USA: ‘Guiding the world to the best of Black culture’

This interesting organisation describes itself as a ‘multi-dimensional media company that preserves Black culture by promoting travel and cultural tourism’. It goes on to say that today ‘vibrant African communities stand across the world as a result of our ancestors. Souljourn will shed light on the best of Black communities for all travellers to experience and enjoy’.

Souljourn, in 2003, offered guides to four US cities, namely Atlanta, Chicago, Los Angeles and New York.

The Souljourn guide to Los Angeles

Published in 2002, this 700 page guidebook had a subheading setting out its aim as ‘Guiding the World to the Best of Black Culture’. Its editor went on to say more about the guide by saying ‘Here are the sites, the scenes and the secrets of Los Angeles, ready to welcome you for whatever pleasure, with Souljourn as your guide, you’ll be welcomed here. Enjoy the history. Remember the legacy. Take the journey’.

The guide had a number of distinctive features, as follows:

- A two-page section at the beginning in which the authors dedicate the guide to Nat King Cole, with a two-page history of his life. It ends ‘this powerful and graceful entertainer, epitomised everything that Black Hollywood is today, potent, resilient, beautiful, determined, and most of all, proud’.
- An acknowledgement section that featured dozens of people from staff in the Mayor’s Office in Chicago and the Harlem Hospital to American Airlines and Western Union.
- All the photographic images were of black people, understandably, even in the advertisements.
- The authors point out that many of the original settlers of Southern California were of African descent.
- The guide draws attention to the fact that in recent decades wealthy Black business owners, media personalities and professionals have occupied ‘palatial homes’ in fashionable neighbourhoods.
- It mentions when talking about where to stay that ‘staying with families and friends is a time-honoured Black tradition’ and gives advice to those thinking of staying with friends and relatives in Los Angeles.
- When talking about commercial accommodation, the guide recommends readers to approach the African-American Association of Innkeepers for advice. It also recommends hotels ‘which are either located near areas that are predominantly African-American or they are those that are frequently utilised for family reunions, banquets or parties’.
- Naturally, this guide highlights Black-owned businesses to its readers including health food shops, a comedy club, shops and sports venues.
- There is a page-long list of Black-owned or controlled newspapers, radio stations and television companies, with fifteen entries.
- A six-page list of events and festivals of particular interest to African Americans.
- A list of Black churches of different denominations.
- A ‘shopping Black’ section featuring everything from collectables to clothing to fashion accessories.
- A museum listing museums and galleries focusing on African and African-American art.
- A three-page section on landmarks and historic sites, including tours of Black neighbourhoods.
- A section on restaurants with a strong emphasis on soul food.
- A two-page guide to significant events in Afro-American history in Los Angeles from 1781 to 1998.
- A short editorial on ‘Magic Johnson Theater’ – a multiplan cinema fronted by legendary Black basketball player, Magic Johnson. The cinema champions the cause of African-American films.

- Itineraries to visit places outside Los Angeles which have been influenced by Black people.
- A page of advice for budget travellers, headed 'A Day of Black Culture' for under US \$25.
- A section about Black businesses noting they had grown by more than 50 per cent in the USA between the early 1990s and 2002.
- A page of editorial about how Black people can trace their roots.
- A competition with prizes of holidays to Atlanta, Chicago, Los Angeles and New York.

The whole tone of the guide is very positive and uplifting and it is clearly heavily focused on the specific needs and interests of Black travellers.

However, it is important to note that much of this guide would be of value to any visitor to Los Angeles, regardless of their ethnic origin.

The writers also clearly are aiming this guide at all those with an interest in Black culture, regardless of their ethnic origin.

This guide is far removed from the situation in Europe where the provision of specialist travel publicity for Black people are very rare. Indeed, the European tourism industry, to judge from its brochures as well as from the mainstream travel media, seems disinclined to even include images of Black people or any other ethnic group. Given that Europe is multicultural, this is very disappointing and a concern which the industry should address.

Conclusion

This guide book is a clear illustration of the fact that in the USA the Black traveller is a well-established market segment; it also suggests that non-Black tourists might also be interested in discovering Black culture in Los Angeles, as well as in Atlanta, Chicago and New York. This is in sharp contrast with Europe, where the various ethnic minority groups in different countries do not seem to have developed to anything like the same extent as Black people have in the USA. Surely it is only a matter of time before this situation changes in Europe.

Discussion points and essay questions

1. Discuss the benefits of publicity such as 'Souljourn' for Black travellers in the USA.
2. Critically evaluate the way in which the mainstream tourism industry in your country meets the needs of people from different ethnic origins in your country.

Exercise

You should select an ethnic minority group within our own country. You should then endeavour to produce a guide book about your city/region/country, which highlights the role of this ethnic group and its culture, in the city/region/country.

Case study 8

Hilton Head Island, USA: The leisure island for golf and leisure shopping

Introduction

Hilton Head Island is the largest of the sea islands along the South Carolina coast in the United States. Europeans first travelled to the island over 500 years ago, although Native Americans had lived on the island prior to this. The island is called Hilton Head Island because it is named after an English sea captain, William Hilton. He was commissioned by a group of planters from Barbados to set sail to find new lands where sugar and indigo could be planted. He landed on the island in 1663 to be greeted by the Spanish-speaking Indians and he soon claimed the island for the British Crown. The island soon developed, and by 1860 there were twenty-four plantations that grew cotton, indigo, sugar cane and rice. These were populated by slaves and their overseers. The civil war and the abolition of slavery changed the role of the wealthy plantation owner forever, and the island fell back into obscurity. The population during the 1940s and 1950s began to recognise that the natural beauty of the island, and particularly the beautiful sea pines, could offer great opportunities for the development of leisure businesses.

Charles Fraser was the first man to fully realise this potential when he developed the first plantation on the west of the island – the Sea Pines plantation. Another important milestone was the completion of the James Byrnes Bridge in 1982 which linked the island to the mainland for the first time. Since the building of the bridge, the development of the island as a leisure centre has been rapid.

Hilton Head Island today

Hilton Head Island is approximately 12 miles long and 5 miles wide and the beaches are wide, beautiful and surround the whole island. The recent development of the island means that there is no recognisable town centre, but it is composed of a number of plantations that have steadily built up.

Around 30 000 people live on the island permanently, but approximately two million tourists visit the island every year. This means that a large number of

hotels, resorts and timeshare operations have grown up on the island to serve these transient visitors.

Hilton Head Island is now a major leisure centre in the United States. The main attractions of the island are based around the plantations that have been developed since the Sea Pines plantation was established. The plantations that now exist are shown in Exhibit 8.1.

Exhibit 8.1

The plantations of Hilton Head Island

Sea Pines
Wexford Plantation
Shipyard Plantation
Long Cove Plantation
Palmetto Dunes Plantation
Port Royal Plantation
Indigo Run Plantation
Palmetto Hall Plantation
Hilton Head Plantation.

Each of these plantations has road access from highway 278 that runs across the island, but they are in effect *cul de sacs* which have controlled access.

Access to Hilton Head Island is by road from the mainland from the Beaufort and Savannah regions. There is also a small airport on the island with planes arriving from major US areas including the major city of Charlotte.

The climate of the island is very good with year-round sunshine and a warm climate with small amounts of rainfall.

Exhibit 8.2 shows some facts and figures about the island. It can be seen from this that the island has based its development on the effective exploitation of the natural features of the island, in association with the development of planned leisure activities such as golf and shopping.

Exhibit 8.2

Facts about Hilton Head Island today

- Approximately 30 000 permanent visitors
- Approximately 2 million visitors per year
- Accommodation consists of approximately 3000 hotel rooms and 7000 villas and homes to rent
- Approximately 300 restaurants, pubs, cafes and bistros with every world cuisine on offer and fish a speciality
- Leisure activities based on the outdoors, nature, golf (25 major courses) and leisure shopping. Other popular activities include cycling, horse riding and walking

(Source: Hilton Head Island Tourist Information)

The island planners have restricted the development of high-rise buildings and have not permitted street lighting which means that the island has a very 'nature' feel despite the presence of cars.

Golf on Hilton Head Island

There are twenty-five major golf courses on the island, which means that it is a paradise for golfers. A list of these courses is shown in Exhibit 8.3.

These courses are considered to be amongst the best in the country, and several of the courses are considered to be amongst the best in the world by professional golf players. The opportunity to play golf on the island goes hand in hand with the opportunity to see professional golfers play. The

major event of the year is the PGA Tour (Heritage) which is held on the Sea Pines course in the Spring.

The golf courses are a good mixture of private and nonprivate courses. It is also possible to take golf lessons on the island to improve performance. These lessons are held regularly at many of the courses and are usually run by PGA-certified instructors.

The combination of the beautiful outdoor scenery and good weather, coupled with well-developed tourism infrastructure, has meant that Hilton Head Island has become a world renown golfer's destination. The development of high-quality hotels, resorts and shopping malls has also added to the overall leisure opportunities that exist on the island.

Exhibit 8.3

Major golf courses on Hilton Head Island

- | | |
|--------------------------------|----------------------------------|
| • County Clubs of Beaufort | • Palmetto Dunes/Fazic |
| • Country Clubs of Hilton Head | • Palmetto Dunes/Jones |
| • Crescent Pointe Gold Club | • Palmetto Hall/Arthur Hill |
| • Eagle's Pointe Gold Club | • Palmetto Hall/Robert Cupp |
| • Executive Golf Club | • Port Royal Plant/Barony |
| • Golden Bear Golf Club | • Port Royal Plant/Planter's Row |
| • Hidden Cypress Gold Club | • Port Royal Plant/Robber's Row |
| • Hilton Head National | • Rose Hill Country Club |
| • Island West Golf Club | • Sea Pines/Harbour Town |
| • Old Carolina Golf Club | • Sea Pines/Ocean Course |
| • Old South Golf Link | • Sea Pines/Sea Marsh |
| • Okatie Creek Golf Club | • Shipyard Plantation. |
| • Oyster Reef Golf Club | |

Leisure shopping on Hilton Head Island

Leisure shopping has become well recognised in recent times as a leisure activity. The recognition that shopping can be a source of relaxation with the opportunity of talking to others while doing the chores was recognised a long time ago. The motivations for shopping are many and have been characterised by Dholakia (1999) as being 'as interactions with family, utilitarian in shopping as pleasure'.

Although shopping is largely associated with women (South and Sptize, 1994) there is a growing trend for other members of the family such as adults and children to engage in leisure shopping, particularly for nonessential items (Malcolm, 1987).

The different types of shopping venues that have been developed more recently have encouraged individuals to engage in leisure shopping experiences particularly for nonessential items. A reduction in working hours, rising disposable incomes and increasing ownership of cars have all fuelled the development of new shopping venues. Mixed leisure, recreation and shopping developments have grown in most developed economies to respond to this type of activity. Different types of shopping destination were defined by Mintel (2002b) as being: *Retail Parks, Shopping Centres, Regional Shopping Centres, Factory/Designer Outlets*.

Destination shopping

Destination shopping is where the individual travels to a specific retail location for an extended

shopping experience. This is usually in the form of a shopping outlet that is out of town and incorporates other leisure activities. The idea that a location can develop as a shopping destination in its own right is a recent phenomenon, and one could argue originally an American invention. Hilton Head Island has developed as an important destination for leisure shopping experiences against the backdrop of a wider selection of leisure experiences.

The Official Shopping Guide to Hilton Head Island gives the visitor an extensive number of options for their leisure shopping experience during their visit to the island. Information about the shopping experiences on the island is also given on the Internet at www.hiltonhead.com/guides.

Some of the shopping centres that are available on the island are shown in Exhibit 8.4.

Some of the shopping centres offer a variety of leisure opportunities. Pineland Station shopping centre, for example, offers a very upscale shopping experience with dining and arts outlets.

Conclusion

Hilton Head Island has developed as a purpose-built leisure experience since the early development of the first Sea Pines Plantation. A summary of the leisure experiences that are on offer on the island are shown in Exhibit 8.5.

These developments coupled with careful planning to underpin the tourism development has provided the island with good tourism revenues from both national and international visitors.

Exhibit 8.4

Shopping centres on Hilton Head Island, US

- | | |
|-------------------------------|---|
| • Retail Parks/Shopping Malls | The Mall at Shelter Cove |
| • Factory/Designer Outlets | Tanger 1 and 2 Retail Outlets |
| • Destination Shopping | The Plantation resorts each of which has their own shopping centre |
| • Speciality Shops | Day Spas, Antique collection stores, Pet stores, Clothing and Accessories |

Exhibit 8.5

Leisure experiences on Hilton Head Island

- Beautiful outdoor beach locations and other natural sights such as wildlife areas
- Full range of tourism infrastructure including hotels, resorts and restaurants
- A full range of leisure activities
- A golfer's paradise
- A full range of shopping experiences including factory outlets, factory malls and speciality stores.

Discussion points and essay questions

1. Discuss the opportunities that the development of an integrated leisure experience can offer to destination managers.
2. Critically review the place of either sporting activities such as golf or shopping experiences as the basis for the economic development of a place, region or country.

Essay questions

1. Critically appraise the role of women and children in the explosion of leisure shopping development.
2. Critically assess the advantages and disadvantages that may result from the development of destinations on the basis of created leisure experiences rather than cultural and historical sights.

Case study 9

Las Vegas: The world of casinos and themed hotels

Las Vegas is one of the icons of the global tourism industry, literally an oasis of leisure and entertainment in the desert.

History

Founded at the beginning of the twentieth century as a result of railway building, the 'city' was a small backwater until the 1930s. In 1931, Nevada legalised casino gambling, and this, together with the building of the Hoover Dam nearby, provided the stimulus for the growth of Las Vegas.

Legal gambling and prohibition soon put Las Vegas on the American tourist map in the prohibition era. Indeed, it was largely money from 'bootlegging' and gangsterism that appears to have funded the building of the first luxury casinos in Las Vegas in the 1940s.

Legendary gangster Bugsy Siegel was a prime mover in the development of Las Vegas, with the Flamingo casino, although the budget overspent on the project led to him being murdered in 1947 by organised crime interests.

For the next twenty years the 'mob' controlled the development of Las Vegas and presided over the greatest hotel-building boom ever seen in the USA. Between 1951 and 1958 alone, eleven major new hotel-casinos opened in the city.

The association with gangsterism gave Las Vegas a tarnished, lurid image in the US media but it was also a place of glamour and high spending excess.

The 1950s and 1960s were also a 'golden age' for entertainment in Las Vegas, principally due to the activities of the so-called 'Rat Pack' featuring Frank Sinatra, Dean Martin and Sammy Davis Junior. At this time, Las Vegas was perhaps the best place in the world to see top-class comedy and popular music acts.

In 1966, eccentric billionaire Howard Hughes arrived in the city and began to invest heavily in the resort. This stimulated another building boom, with twelve new hotel-casinos being built between 1968 and 1973.

In the 1970s, the image of Las Vegas improved with the arrival of 'legitimate' hotel chains such as Hilton and Holiday Inn.

By the 1980s, Las Vegas was free of significant 'mob' influence and a new era began in which efforts were made to change the image of the city, from a place for gambling and sex to an entertainment destination.

This new era was ushered in at the end of the 1980s by the development of the 'Mirage' complex by Steve Wynn. As well as gambling, this US \$650 million hotel-casino had a strong emphasis on theming and fantasy. Other themed casino-hotels opened throughout the 1990s.

Between 1990 and 2000, more than thirty new hotel-casinos were opened, or were due to open, including projects costing more than US \$nine thousand million.

Today, Las Vegas is trying to modify its image even further and wishes to be seen as a family entertainment centre, for the first time ever.

Las Vegas today

A few statements illustrate Las Vegas' continued success today, notably the fact that:

- it is the only city in the world with more than 100 000 hotel rooms;
- Las Vegas is the fastest growing city in the USA with a population which is growing at a rate of around 4000 people per month;
- there are more shows every day in Las Vegas than anywhere else on earth.

The 'Time Out – Las Vegas' guide, published in 2003, gives an indication of the range of leisure opportunities available in Las Vegas. For example, it listed:

- 38 major hotel-casinos
- 13 nonresidential casinos
- 122 restaurants
- 43 bars
- 56 shows and reviews in casinos
- 14 adult entertainment venues.

This, of course, is a selection, not a complete listing. Let us now look at some aspects of the Las Vegas packet.

- (i) *Casinos* – Gambling is available in Las Vegas 24 hours a day, on an incredible scale. For instance, the Manderly Bay Hotel-Casino has 12 500 square metres of gambling space and most major hotels have over 2500 slot machines. Many casinos have minimum stake rules with figures of US \$20 or more which is not unusual. In addition to the hotel-casino, many neighbourhoods have their own local casinos which are a leisure facility, primarily for local residents.
- (ii) *Themed hotels* – Many of the leading hotel-casinos are heavily themed, creating a fantasy atmosphere. For example, there is:
 - Manderly Bay with its South Sea Island theme;
 - Mirage, themed on a Polynesian village, with a Dolphin habitat, ‘volcano’, ‘rainforest atrium’ and 20 000 gallon aquarium;
 - Paris Las Vegas with its half-size replica of the Eiffel Tower and French-speaking staff;
 - Venetian, complete with sanitised canals and gondoliers;
 - Luxor, including a recreation of Tutan Kharmouns tomb;
 - New York, New York, featuring replications of everything from Times Square to Central Park, and the ‘Coney Island Experience’, an entertainment complex;
 - Circus Circus, with a circus within the hotel;
 - Excalibur, encompassing ‘recreations’ of King Arthur’s Court and Sherwood Forest;
 - Hard rock, with its rock memorabilia and swimming pool where music can even be heard underwater.
- (iii) *Casino entertainment* – Big name artists provide the entertainment in the major casinos, with a bewildering variety of shows on offer, any night, including in 2003:
 - the Penn and Teller magic show at the Rio
 - the Chippendales, male strippers, also at the Rio
 - the Celine Dion show at Caesar’s Palace
 - Michael Flatley’s ‘Lord of the Dance’ spectacular at the Venetian
 - the ‘O’ *Cirque de Soleil* show at the Bellagio
 - the ‘Catch a Risky Show’ comedy show at the Excalibur
 - the mimical ‘Mamma Mia’ at the Manderly Bay.
- (iv) *The buffets* – low cost ‘all-you-can-eat’ buffet, offered generally by the casinos to encourage customers not to leave the casino. In 2003, lunch buffets could cost as little as US \$7. As everything else in Las Vegas, buffets are on a grand scale with that at Circus Circus serving 10 000 diners a day, for example.
- (v) *Leisure shopping* – After a slow start, Las Vegas is now a major leisure shopping centre, with major motels and ‘in-hotel’ arcades of designer label shops. However, as a warning to potential gamblers, there are also many ‘pawn shops’ where impoverished gamblers sell their belongings to raise cash.
- (vi) *The sex industry* – Las Vegas has always been noted for its role in the ‘adult entertainment industry’. Nevada as a whole has more than thirty legal brothels. None are actually in Las Vegas but prostitution is widespread. However, the 2003 ‘Time Out’ guide to Las Vegas did list two ‘sex superstores’ and fourteen adult entertainment venues, including two ‘swingers clubs’.
- (vii) *Special events* – Throughout the year, Las Vegas hosts a range of special events and festivals designed to attract visitors, targeting different market segments. The 2003 calendar included everything from the World Series of Poker to a Gay Pride Festival, and Funky Halloween Ball to the Viva Las Vegas Rockabilly Convention, and Shakespeare in the Park to the Greek Food Festival.
- (viii) *Weddings* – Weddings have been big business in Las Vegas for decades due to the easy-going marriage laws. In 2002, nearly 120 000 weddings took place in Las Vegas. However, marriage, Las Vegas style, usually involves a novelty element, usually in the ‘venue’ which can include a helicopter flight and the ‘deck’ of the Star Trek starship ‘Enterprise’. Most hotels have themed wedding chapels and at the ‘Graceland’ wedding chapel people can be married by an Elvis Presley impersonator.
- (ix) *Side trips and excursions* – While the local tourism industry prefers that tourists stay within Las Vegas, the city is a good touring centre for some spectacular sites, notably:

- The Grand Canyon, which can be visited by sightseeing aircraft, bus and train at prices of up to US \$200 and more.
 - The Hoover Dam, less than an hour's drive from Las Vegas.
 - Death Valley National Park, one of the hottest and driest places on earth.
 - Zion National Park in neighbouring Utah.
- (x) *Museums and art galleries* – Las Vegas has never marketed itself as a cultural destination in the classic sense. However, in recent years, as it has endeavoured to project a more optimistic and family image, some notable new museums and art galleries have opened. Firstly, there are major works galleries in some hotel-casinos, most notably the Bellagio Museum of Art and the Guggenheim–Hermitage Exhibition in the Venetian. However, at the same time, it is interesting to note that the full-scale Guggenheim Museum in the Venetian known as the 'Big Box' closed in 2003.

Major 'museums' in Las Vegas include Madame Tussaud's Wax Museum and Guinness World of Records museum, as well as a range of other attractions with themes ranging from Star Trek to Chocolate, Elvis Presley to Liberace.

The Las Vegas experience has a number of other miscellaneous elements which are worthy of mention, including:

- the architecture which is often daring and imaginative, and at the same time very kitsch;
- everything is on a grand scale with hotels, for instance, having more than 3000 rooms, and even 5000, in one case;
- often the most expensive suites in a hotel are not for open sale; instead they are often given only as 'comps', free of charge to VIPs and 'high roller' gamblers;
- gambling begins at the airport, on arrival, and up to departure, with slot machines in the airport itself;
- demand varies dramatically by days of the week and hotel prices can vary dramatically between, for instance, a Tuesday and a Saturday;
- the famous or infamous '*strip*', the main boulevard where most of the 'action' is located, particularly along a seven kilometre section. The popularity and rates of hotels are often determined by whether or not they are located on 'The Strip'.

So far we have focused on the leisure market, but much of the success of Las Vegas is based on *conventions*, many of which bring thousands of delegates to the city. Many of these events take place at the Las Vegas Convention Center, the largest convention venue, currently, in the world.

Corporation delegates often stay in hotels away from the 'Strip', which are part of major brands such as Marriott. They provide a major element of visitor expenditure in Las Vegas, particularly in the evenings, when the day's business is over.

The marketing of Las Vegas

Even with all its attractions, Las Vegas would not be such a success if it were not for the work of its destination-marketing organisation, the Las Vegas Convention and Visitor Authority. This organisation, funded by local tax income, initiates a wide range of activities to market the city. It has a particularly effective press and public relations operation which sends out press releases on everything from special offers to new airline routes to Las Vegas. There is also an excellent website.

Once tourists arrive in Las Vegas, the authority there has a large information centre, although in 2003 this was only open from Monday to Friday.

Current development

Investment and product improvement in Las Vegas is constant and on a massive scale. At the time of writing, for example, the new, improved Las Vegas Monorail was due to open in 2004, while the US \$2000 million Las Vegas mega-resort was scheduled to open its doors during 2005.

Conclusion

Las Vegas is an unlikely tourist destination in an isolated and an inhospitable location. It owed its early growth to lax controls on prohibition, gambling and weddings. However, its contrived success to the resort is its constant re-invention of itself and of huge private-sector investment in product development. It is now entering a new era as a more sophisticated, family-oriented resort, but it looks set to continue to be one of the best-known brands in destination marketing and an icon of world tourism.

Discussion points and essay questions

1. Compare and contrast Las Vegas and Dubai in terms of their present and target markets, trying to explain the differences.
2. Discuss the reasons behind the creation, growth and continued success of Las Vegas as a tourist attraction.
3. Critically evaluate the idea that Las Vegas has no real competitors, either within the USA or internationally.

Exercise

Using the Las Vegas Convention and Visitors Authority website, access the latest data for the Las Vegas market. From this data, write a report which:

- identifies the key points about the current market for trips to Las Vegas;
- identifies and explains trends in the Las Vegas market over the past five to ten years.

Case study 10

New niche markets in the leisure industry: The boutique hotel, the clubbing holiday and the music festival experience

Introduction

There are signs in the leisure sector that consumers are seeking out increasing numbers of niche products and services to satisfy their demands. A niche product or service is one that is focused very much on a very particular market segment who is demanding a very specific set of benefits.

This is a very different market from the mainstream products and services that target large groups of customers with products and services that have mass market appeal. We will refer to three examples of niche markets in the leisure sector in this case study, to illustrate some of the key factors in these specialist markets. The examples which we use are:

- the boutique hotel
- the clubbing holiday
- the music festival experience.

The boutique hotel

The emergence of the boutique hotel as a phenomenon has been one of the most interesting developments in the hospitality sector of the leisure industry. Key features of the boutique hotels include:

- a smaller hotel with a more intimate feel
- an emphasis on designer fixtures and fittings and appropriate electronics
- each hotel seen as having an individual identity despite the presence of a 'soft brand' in some circumstances
- a focus on modern styles using key designers to develop the concepts
- personalised service but the hotels do not always have full service facilities such as restaurants and bars.

The first entrepreneur to launch boutique hotels was Ian Schrager, who used celebrity architects and interior designers such as Phillippe Starck. Other examples of operators who have entered the boutique hotel market are shown in Exhibit 10.1.

It can be seen from Exhibit 10.1 that the majority of the boutique hotel operators originated in the US, although the Malmaison brand originated in the UK. Ian Schrager is an entrepreneur who has led in the development of boutique hotels. He is an entrepreneur who had worked in the media industry previously and had therefore built up an impressive knowledge of individuals in this sector and their requirements when booking a hotel. Ian Schrager has developed properties across the world including ones that have opened in Los Angeles, New York, London and Miami. His concept for the hotels depends on:

- smaller properties;
- cheaper materials such as cotton, linen and slate used in imaginative ways by sophisticated designers;
- the design of the hotels is based on the lifestyles that the guests are trying to lead, rather than expensive fittings and large rooms.

The target market for Ian Schrager hotels is the person who works in the music and media industries. Many of the customers are high profile. This is a market that Ian Schrager knows well and so it has allowed him to develop highly targeted hotel offerings. One of the issues for the boutique hotel operators will be how sustainable the current trend is for these types of properties, and whether the entry of more mainstream hoteliers into the market will change the overall development patterns for this types of properties. What is clear is that this type of specialist hotels is proving very popular with a targeted group of customers who want a targeted offering.

Exhibit 10.1

Leading boutique operators

Operator	Region present	Head Office	Number of properties
Ian Schrager	US and UK	New York	12
Kimpton	US	San Francisco	35
Joie de Vivre	US	San Francisco	21
Boutique Hotel Group	US	New York	6
W (Starwood)	US and Australia	New York	17
Malmaison (Rezidor Hospitality)	UK	Glasgow	5
Firmdale	UK	London	5
Myhotel	UK	London	2
South Beach Group	US	Miami	6
Art'Otel (Park Plaza)	Germany, Hungary, UK	Amsterdam	5

(Source: Mintel, 2002a, based on company data)

The clubbing holiday

The clubbing holiday had its roots in the early development in the 1980s of such destinations as Ibiza, where the development of San Antonio was largely on the basis of all-night clubbing, parties and the music scene. Since this time, 'clubbing' has become a global phenomenon which has been fuelled by:

- a growth in the global music industry and universal themes in music such as garage and dance;
- the increasing propensity of young people to travel independently to large music venues that offer particular experiences;
- the emergence of international DJs such as Fat Boy Slim who fuelled the interest in dance music composed for the clubs;
- the growth of large superclubs that used branding to develop their global businesses. This included such names as Ministry of Sound and Manumission;
- the growth of designer drugs.

Holiday companies have provided 'clubbing' packages to enable the UK clubber to have holidays with a strong focus on music, clubbing and partying. Holiday companies (such as Club 18-30)

have developed special brands to develop the business which was estimated to be in the region of £18,00,000 million in 2002 (Mintel, 2003).

Destinations such as Ayia Napa in Cyprus and San Antonio in Ibiza have developed their destination infrastructure to particularly support this new 'clubbing' market segment. Cities such as London (UK), Reykjavik (Iceland) and Amsterdam (Holland) have developed a 'clubbing' scene to underpin tourism development.

It is important for these destinations to be aware of drugs such as Ecstasy, which became a strong feature of the clubbing scene despite legislation that attempted to control this development.

The 'clubber' tends to start their visits to suitable venues in their local region and there has been a growth in the number of clubs in particular cities to satisfy this demand. Clubs such as the Ministry of Sound, and the Republic, have developed these markets.

Clubbers then begin to look for short break holidays to major cities in the world and longer holidays to enable them to meet up with like-minded individuals from across regions of the world, such as Europe. The balance is struck between the attraction of 'clubbers' and other market segments such as couples and families. Rowdiness

and bad behaviour from drunken clubbers can cause the reputation of a particular destination to be ruined if careful management and control is not exercised.

The development of the clubbing business from the UK is shown in Exhibit 10.2. It can be

Exhibit 10.2

Clubbing Venues in the world and UK providers

UK destinations

- London
- Bournemouth
- Brighton
- Glasgow
- Leeds
- Sheffield

City destinations

- Amsterdam – Holland
- Barcelona – Spain
- Berlin – Germany
- Paris – France
- Reykjavik – Iceland

Worldwide destinations

- Ibiza – Spain
- Majorca – (Megaluf) Spain
- Crete – (Malia)
- Rhodes – (Falaraki)
- Cyprus – (Ayia Napa, Kavos)
- Gran Canaria
- Tenerife

UK providers of clubbing holidays

- Club 18-30
- 2 Twentys
- Escapades
- Freestyle
- Global Clubber
- Ministry of Sound Holidays
- Thomas Cook
- First Choice
- Airtours – MyTravel
- TUI UK
- STA Travel

(Source: Mintel, 2003)

seen that certain cities in the country have developed particular reputations for the development of existing clubs and experiences. Cities overseas in different countries have also targeted the 'clubber' as a result of the development existing at club venues. The development of the clubbing holiday to major European destinations has also provided a significant contribution to revenues for some major European tour operators. These operators have developed specific brand identities to underpin this market development.

The music festivals experience

Introduction

There has been a trend across the world towards an interest in global music of various forms. It appears that it is not enough simply to listen to the music any more. Music lovers now have a growing desire to attend music concerts and festivals to experience authentic music styles at first hand in their local setting. The growth of the international music festival has been seen as a recent opportunity for many destinations in the world, particularly if they are trying to boost their tourism revenues from inbound tourists.

The international music festival

Individuals who are interested in particular styles of music can now travel to a range of music festivals across the world at specific times of the year. Destination and events managers have worked hand in hand to develop music festivals that are often based on the local style of music. The aim of these festivals is usually to bring people together from regions, nations or the world, who can either perform or make up the audience. The larger the festival, the more likely it is to attract people from other countries to visit and therefore act as a generator of tourism revenues. Certain destinations have developed a long tradition of holding music festivals on an annual basis which also regularly attracts repeated customers because of the relationships that develop between performers and their audience. Examples of major music festivals in the world can be seen in Exhibit 10.3.

It can be seen that many destinations in the world have chosen to develop annual music events, usually on the basis of a local style of music.

Exhibit 10.3

Music festivals in the world

- *Nepal* Jazzmandu
two weeks jazz event designed to boost tourism
April. www.kathmandujassfestival
- *US* Festival de Louisiane
five-day cajun and zydeco festival in Louisiana
April. www.festivalinternational.com
- *Madagascar* Donia
five-day music festival on Nosy Be Island
May; Carnival style pageant
- *Morocco* Gnauua Festival
three-day music festival in Essaovira
June. www.festival-gnauua.co.ma
- *Serbia* Guca
three-day brass music festival
www.guca.co.yu
- *Africa* Awesome
two-day music festival embracing different music styles including gospel and mbaquanga
September
- *Canarias* Womad
a four-day music event held in Las Palmas
November. www.womad.org
- *Colombia* Cali Fair
Salsa music festival. One week commencing on
December 25. www.feriadecali.com
- *Mali* Festival of the Desert
a festival of world music
2 days – early January. www.festival-au-desert.org

(Source: Daily Telegraph, 2004)

Conclusion

We have seen in the three mini-case studies that there are signs that consumers are beginning to choose focused niche products and services in the leisure industry that offer specialist offerings. These needs and wants can be exploited but often means that marketers have to think of leisure as being a holistic experience where overlapping organisations from different sectors have to work together.

Discussion points and essay questions

1. Critically analyse the reasons for the fact that increasing numbers of consumers are demand-

ing specifically designed niche products in the leisure sector.

2. Discuss the view that the development of niche leisure products has emerged as a result of the emergence of global consumers.
3. Assess the damage that can occur to tourism as a result of the development of a destination as a 'clubbers paradise'.

Exercise

Choose one place that has decided to target the 'clubber' as a key part of their destination-marketing strategy. Explore the methods that have been used to promote the destination.

Assess any possible negative impact that this might have brought to the destination.

Case study 11

International film and the tourism industry

Introduction

The growth of the film industry and the emergence of blockbuster films has had a significant influence on the leisure industry in a number of ways. The first way has been in the growth of the cinema and movie channels, and at home cinema systems that have meant that it is now possible to produce a film that has an international appeal. The film industry has also created economic growth for particular areas in the world that have concentrated on film production and the associated services that surround the film industry. The area of Hollywood and Beverly Hills, California, is an example of this type of concentrated development.

This case study is about the growth of tourism that has originated from the film industry. The case study considers different aspect of tourism development that can originate as a result of the film industry or their creation of films with an international cult status.

The film industry as a destination or visitor attraction

The concentration of the film industry into certain areas of the world has allowed organisations such as film and TV studios and destination managers to create visitor attractions that can attract tourists. The best example of this is the Hollywood and Beverly Hills areas in California, US, which have become a living museum of the American film industry.

Hollywood, Beverly Hills and Sunset Boulevard

The Hollywood area of California has developed a prosperous film industry over a long period of time and, as a result, has become a major tourist destination for visitors who are interested in the film industry, in general. The famous Sunset Boulevard was built as a route between the film studios that had developed in Hollywood and the residential neighbourhoods of Los Angeles such

as Beverly Hills, Bel-Air and Malibu Colony, where the stars, film directors and associated personnel built their homes.

This area is now a major destination where visitors can do a whole programme of activities including:

- visits to various film studios including Warner Brothers (of Friends and ER fame) and MGM studios;
- tours around the stars' homes, on a conducted tour taking to areas of Hollywood and Beverly Hills;
- Sunset Boulevard itself in order to visit major attractions such as clubs, music and comedy venues, and restaurants which the stars are known to frequent;
- visits to sights further away that have been used as locations in famous films. An example of this are the beaches that were used in the film *Jaws*, and in the television series *Baywatch*.

Other areas of America have also focused their tourism development on the basis of the film industry. An example of this is the area of Mississippi that has developed a Mississippi Film Tourism Map that has been developed as a result of significant filming and postproduction activities that has taken place in the area.

A press release for this new venture (as shown in Exhibit 11.1) that is under development of a Film Enterprise Zone was launched in January 2003.

Other areas of the world are also developing visits to film production facilities as an important part of their destination development. The Indian film industry (Bollywood as it has become affectionately known) has developed a significant film industry that is now one of the largest in the world that makes over 800 films a year in many exotic locations. Some of the film studios are now opening up their doors to visitors in some locations in India. The film and studio facilities in their own right therefore offer many opportunities in terms of destination and visitor attraction development.

Exhibit 11.1

Mississippi Film Office unveils first Mississippi Film Tourism map (press release January 2003)

JACKSON, Miss – In celebration of its 30th birthday, the Mississippi Film Office, a bureau of Mississippi Development Authority's (MDA) Division of Tourism is unveiling the state's first Mississippi Film Tourism Map at an 11.00 am press conference on Monday January 13, in the Supreme Court Chamber of the New Capitol. This press conference will launch *Mississippi Film Week*, a weeklong celebration of the Mississippi Film Office's 30th birthday. It will also provide attendees with an insight into Mississippi's accomplishments in film over the past 30 years.

'The Movie Map of Mississippi celebrates film locations across the state and through the years', said Ward Emling, manager of the Mississippi Film Office. 'It provides a clear picture of the statewide impact of the film industry and will provide a base for tourism development in the countless communities that have hosted film production over the years. And it notes well those Mississippians who have played a role in this industry.'

The Mississippi Film Office was created on January 17, 1973. Beginning with *Thieves Like Us* (1973) more than 40 films, 21 documentaries, two television series, 24 television programmes, and countless short films have been filmed in Mississippi. Since its creation the film office has assisted directors in showcasing the works of such Mississippians as Larry Brown, William Faulkner, John Grisham, Beth Henley, Willie Morris, Thomas Hal Phillips, Eudora Welty and Tennessee Williams, amongst others.

Film production in Mississippi has accounted for more than \$100 million dollars in direct expenditure over the years and has generated hundreds of thousands of paychecks to Mississippians. The production of *A Time to Kill* alone extended 10 000 checks. 'We have seen that film production is economic development' said Robert J. Rohrlack Jr, executive director of MDA. 'The Mississippi Film Office is committed to creating a competitive film industry here that will continue to bring solid growth to our state.'

The week's activities will include Monday's press conference launching the week's events, a ribbon cutting for Mississippi's first Film Enterprise Zone in Canton on Wednesday, and a birthday party on Friday morning in the Rotunda of the New Capitol. Communities across the state will be showcasing made-in-Mississippi films throughout the week. Local Convention and Visitors Bureaus can be contacted for more information on Mississippi Film Week movies. All events are free and are open to the general public.

The development of destinations as film locations and the opportunities for tourism development

The filming of major blockbuster films in exotic and interesting destinations has become a major part of the film industry. This is because it is very important for the film industry to produce films that have a special interest and theme that appeals to the film viewer of any age. The location of the film, as well as the theme, provides an important platform for the successful film. Film directors are therefore constantly looking for interesting themes for films, and existing and different locations to

film in to keep consumer interest high. A recent development in the tourism industry has been the desire of the film viewer to see the actual locations in which major films have been shot or visit smaller attractions that are associated with the characters that have been seen in the film. It seems that it is not sufficient for the film viewer to simply see the film – they have to actually visit the site where it was filmed to explore the atmosphere of the film. This is particularly important for films that develop a massive cult status.

We can consider four destinations that have attracted film makers to shoot major films that have achieved cult status, and as a result have developed the number of tourists who visit after

the film has been shown. These four examples are major blockbusters but it is also important to remember that there are many examples of smaller budget films and television programmes that have brought notoriety to particular geographic areas.

The first of these destinations is Scotland.

Scotland – beautiful landscapes and haunting locations

Films shot here include *Braveheart*, *Rob Roy* and *Loch Ness*, which all featured the natural environment and historic settings. The film *Trainspotting* was a hard-hitting urban film that many thought created bad images of Scotland.

Implications

Many of the images created in the blockbuster films of wild scenery and historic monuments have been used in the promotional campaigns that have been developed for the Scottish Tourism Industry. The myth surrounding the *Loch Ness* Monster that has been shown in numerous films including *Loch Ness* has grown visitor numbers to the area.

New Zealand – unusual scenery and exotic settings

Films shot here include *Lord of the Rings* and *Kaho Na Pyar Hai* (India).

New Zealand has many very special sites and has attracted major film makers on to locations to produce major blockbusters. The most famous of these was *The Lord of the Rings* by J.R.R. Tolkien, which was shot over wide areas of New Zealand in dense forests and world-class rapids. Matamata, Tangariro National Park, Queenstown and Methuen were used as locations for the film. The castle near Methuen became a very familiar site in the film.

The *Lord of the Rings* trilogy was one of the most ambitious filming projects ever and *The Fellowship of the Ring* released in 2001 achieved cult status. *The Two Towers* was released in 2002 closely followed by *The Return of the King* in 2003. The Indian film industry also decided to shoot the major blockbuster *Kaho Na Pyar Hai* in New Zealand and this film also achieved cult status in India.

Implications

There were many benefits that resulted from these two major filming projects using New Zealand as their major location. These included:

- the transport of personnel and crews associated with the filming projects. This brought major benefits to the New Zealand tourism industry. Small air operators, for example, transported film crews to different locations in New Zealand for the filming and continue to offer air tours to the most inaccessible sites;
- the New Zealand tourism industry has experienced a significant influx of inbound tourism since the release of the films. This includes tourists from all areas where the two films were screened. Many small excursion operators and tourism enterprises offer tours around the most significant sites in New Zealand;
- New Zealand is able to use the significant public relations advantages that the success of the films create once they become major blockbusters. This offers many advantages with customers and tourism intermediaries such as tour operators.

The Government invested heavily in projects to promote New Zealand as a tourist destination following the release of the film. The New Zealand tourists broadbranded the country as the home of the *Lord of the Rings* and it is estimated that the resulting campaign reached 200 million people worldwide.

The official website promotes a variety of tours to the locations ranging from half-a-day to three-week tours to Middle Earth.

Thailand – the backpacker's dream

The beach

The film adaptation of Alex Garland's novel *The Beach* starring Leonardo Di Caprio was filmed on location in Thailand during 1999 and the film was subsequently released in the UK, US, Japan and Australia in February 2000.

The film tells the story of a young American's doomed backpacking trip to a remote island in Thailand, and achieved cult status, particularly amongst the young, in many different international settings.

The film was shot in many isolated and beautiful areas of Thailand including Phi Phi Leh near Phuket (the beach), Kho Yai National Park, Krubi

and Phuket. Many of the scenes in the film were shot on public land, so it was possible for many people to watch the filming and even in some cases become film extras during the actual filming.

Implications

The filming of *The Beach* in Thailand offered many advantages to the Thailand tourism industry as follows:

- The images in the film portrayed a beautiful and authentic location particularly to young international travellers. The Tourism Authority of Thailand (TAT) carried out an extensive marketing campaign for Thailand which corresponded with the release of the film.
- The country experienced a growth in tourism after the film was shown, and although because many of the visitors were independent travellers, it was often difficult to measure increased expenditure in the country.
- There were worries that there was substantial erosion that occurred on the beaches that were used as the location for the film following the filming period and the monsoon season in 1999.
- There is still significant interest in Thailand as a destination for young independent travellers. A search on the Internet shows that there are many sites where people share photographs and experiences related to *The Beach*. Thailand is still firmly on the itinerary list for the serious young backpacker.

The United Kingdom – glittering spires and Victorian stations

Harry Potter

The *Harry Potter* novels written by J.K. Rowling have become one of the most famous sets of books in the world. The making of the films on the basis of the novels was completed by the American film giant Warner Brothers, and they now have an area of their Warner Brothers tour in Los Angeles dedicated to the Harry Potter films showing sets, costumes and props. The films had a huge budget and were released as follows:

Harry Potter and the Sorcerer's (US)/Philosopher's (UK) Stone (2001)

Harry Potter and the Chamber of Secrets (2002)

Harry Potter and the Prisoner of Azkaban (2004)

The film was shot in many important locations in the UK which have significant historic interest including:

- Alnwick Castle Northumberland
- Bodleian Library, Oxford
- Christchurch Oxford
- Gloucester Cathedral
- Goathland Station, N Yorkshire
- Kings Cross Station, London
- Australia House, London
- Lacock Abbey, Wiltshire
- London Zoo
- Bracknell, Berkshire
- Durham Cathedral.

Harry Potter and the Goblet of Fire is the final film in the series.

The growth of tourism to the UK as a result of the cult status that the films have achieved has been a major contributor to the recovery of the tourism business in the UK, following the reduction in the number of visitors following the outbreak of foot and mouth disease in 2001.

Implications

There have been many benefits that have accrued to the tourism industry in the UK as a result of the Harry Potter films and the cult status that they achieved. These include:

- The Visit Britain organisation was provided with the logo and licence for a year by Warner Brothers following the release of the film. They then produced a movie map '*Harry Potter and the Philosopher's Stone: Discovering the Magic of Britain*' which showed eight locations from the film and 32 attractions around Britain associated with related themes such as Witches, Wizards, reptiles, ghosts and steam trains. These were distributed in 27 NTA offices overseas and on the website www.travelbritain.org/moviemap.
- The promotion of the film also allowed small tourism operators to develop businesses on the basis of the film. Luxury Vacations Ltd, for example, a small tourism operator, developed specialist tours for visitors who wanted to view some of the film locations. They consider that film tourism has provided them with a big boost to their business and tourism to Britain in general. An example of one of their tours is shown in Exhibit 11.2.

Exhibit 11.2

Luxury vacations UK

Discover the *Real Magic* of Britain with a wonderful tour visiting the film locations of movies shot in Britain including: *Elizabeth*, *Robin Hood – Prince of Thieves*, *Iris Murdoch* and many more.

Day 1 Arrive London, transfer to your chosen hotel.

Day 2 Tour of London including: Buckingham Palace, St. Paul's Cathedral, Westminster Abbey, Big Ben and the Houses of Parliament, Kensington Palace, Trafalgar Square, Piccadilly Circus, The Changing of the Guards, Tower Bridge, The Tower of London including the Crown Jewels, Visit Kings Cross Station, used to film the departure of the *first young wizards as they gather on Platform 9 3/4 ready to board The Hogwarts Express*.

Day 3 Visit Oxford, one of the most famous university cities in the world, with its wonderful architecture, rivers and dreaming spires. We can see *Oxford's* most famous college buildings and discover some of the City's secrets. Visit Christ Church College and its Great Hall, used as a double for *Hogwarts School*. Lewis Carroll, the author of *Alice's Adventures in Wonderland* took inspiration from the same College where he attended. The Library and the Divinity School are used to recreate some interiors at Hogwarts.

A short drive from Oxford is one of the country's largest private homes, the ever so grand *Blenheim Palace*. We see the state apartments, Italian gardens and parkland. Lunch in a country pub and then on to the glorious *Cotswolds* to see fairy tale gardens and villages.

Day 4 Drive through the rolling hills of the Wiltshire countryside. Visit *Bath*, a world heritage city with more listed buildings than London. Visit the Roman Baths Museum with plunge pools and hot springs.

Visit Lacock Abbey. Although the Abbey was converted into a private residence in 1539, it still retains much of its medieval character, which *provided locations for various interior scenes at Hogwarts School*.

Visit *Wardour Castle*, unusual hexagonal ruins of this 14th century castle stand in beautiful landscaped gardens by Lancelot 'Capability' Brown. The *Castle featured in the movie Robin Hood – Prince of Thieves*. Visit Gloucester Cathedral – the cloisters are regarded as one of the most beautiful architectural gem in Britain and form the backdrop for several important scenes in Harry Potter.

Return to London Heathrow Airport via Stonehenge, Salisbury and Windsor Castle.

Tour Route

The fascinating film locations of Harry Potter along with the elegance of Bath and London.

Other locations: *Alnwick Castle*, Northumberland, the second largest inhabited castle in England has featured regularly in film and television productions over the years including: *Elizabeth* and *Robin Hood-Prince of Thieves*. The Castle grounds are used as *Hogwarts' exteriors*. *Goathland Station*, North Yorkshire, the station which has barely changed for 150 years, made a perfect double as *Hogsmeade Station* in *Harry Potter*. These locations can be incorporated into *England Explored Tour* or *Britain Discovered Tour*.

(Source: www.luxuryvacationsuk.com)

It is likely that the interest in the Harry Potter films will continue to boost tourist visits to the UK in the foreseeable future.

Conclusion

Film tourism has provided significant opportunities for destination managers. The filming of a major blockbuster film in a particular place will

make a significant contribution to economic development of the region. Some key factors which destination managers have to consider are as follows:

- the attraction of major film makers to their particular destinations;
- the development of a strong link between film tourism and destination management;
- developing an understanding of consumer behaviour in relation to films and the media;

- development of the marketing planning processes that will underpin the image positioning and promotion strategies of particular film locations;
- consideration for future possible developments in film tourism.

Discussion points and essay questions

1. Explore the reasons why film viewers increasingly want to travel to the film locations to develop authentic experiences.

2. Discuss the economic advantage that destination managers can gain from the development of film tourism.
3. Critically analyse the way in which film tourism brings together different elements of the leisure industry.

Exercise

Choose one country that has developed tourism revenues as a result of film tourism. Critically appraise the promotional strategy that underpinned this development.

Case study 12

The growth of the online retail travel market

Introduction

The use of technology and the Internet opened up the opportunity for companies to develop online booking systems that would bypass the more traditional methods of booking such as the retail travel agents. The growth of this sector can be investigated with reference to the Porter's five forces model, shown in Exhibit 12.1.

It can be seen from the diagram above that the growth of online travel booking originated from a

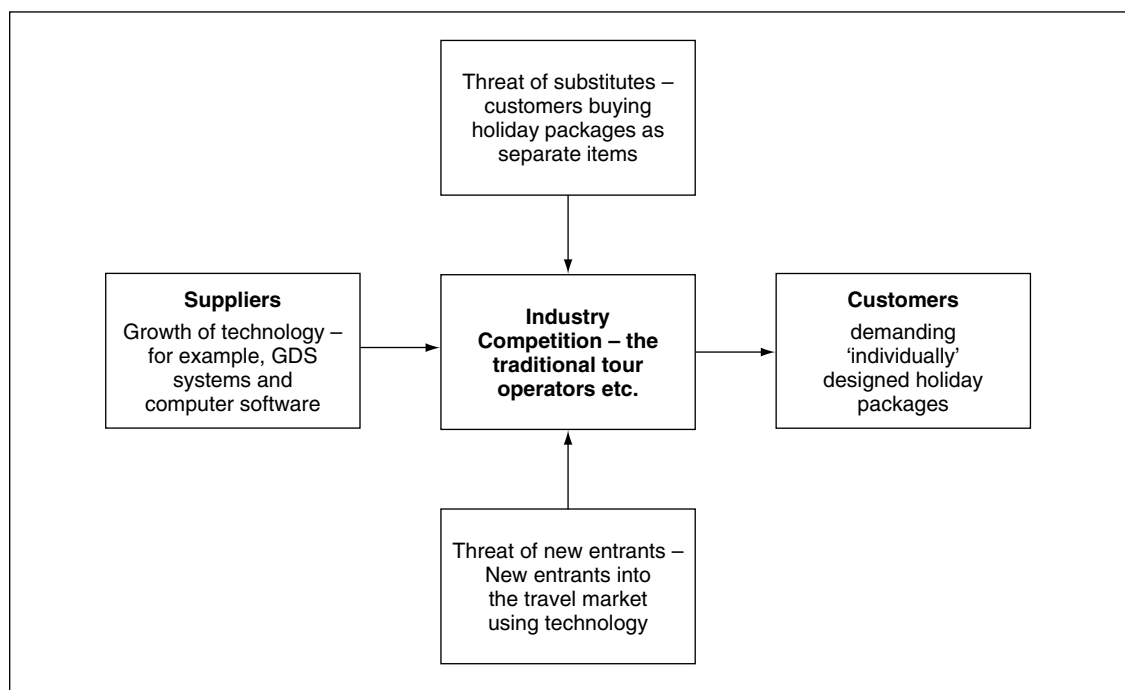
subtle mixture of supply- and demand-led factors as follows.

Supply-led factors

- the consolidation of the travel industry and the emergence of large suppliers;
- the emergence of powerful technologically based systems such as GDS (global distributions systems) and microsoft technology;

Exhibit 12.1

The growth of online travel booking



- oversupply in certain segments of the industry as a result of falling demand as a result of new suppliers and economic factors such as recession.

Demand-led factors

- a growth in international travellers and tourists who want a standardised offering;
- the desire of consumers to engage in technologically based purchase systems such as the Internet;
- the desire of consumers to book individual components of a holiday separately and put together their own 'package'. This has been attributed to the development of the postmodern movement;
- the move of the holiday into the 'bargain basement' area of consumers consciousness. The desire for last-minute bargains and heavily discounted products and services has fuelled the development of online offerings that can offer hard discounts.

The growth of online bookings

There has been a growth in online bookings for travel although estimates for the percentage of online bookings vary according to the source. It is

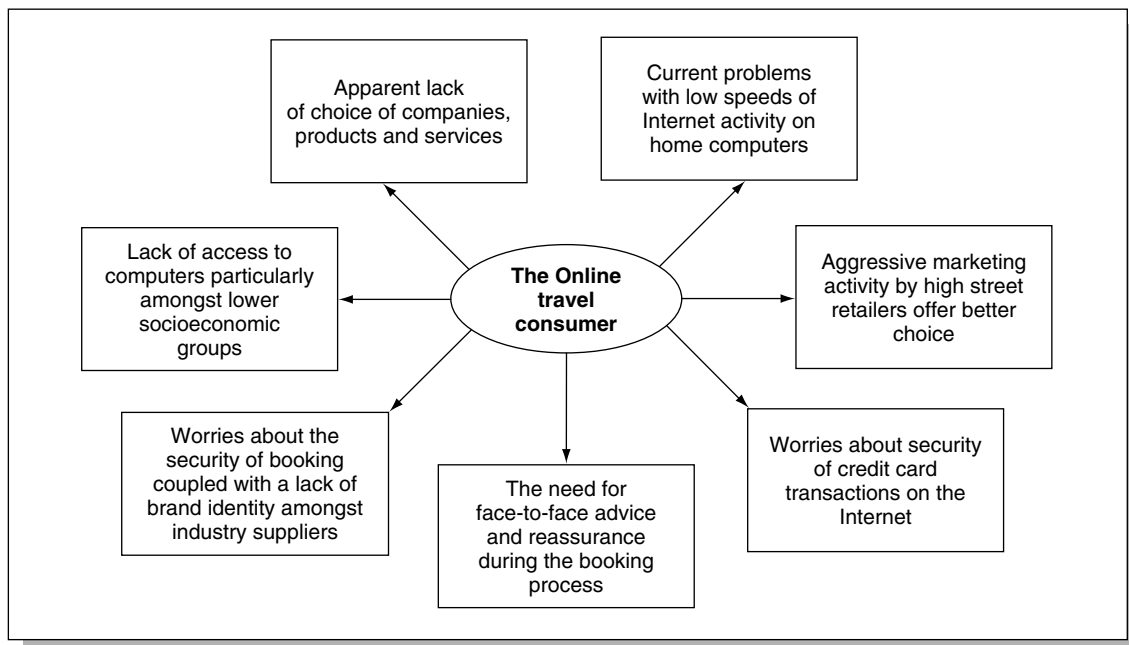
estimated in the USA, for example, that about 10 per cent of all travel in the USA was booked online and this is predicted to raise to 14 per cent by 2005. (Travel Industry Association for Americas – TIA in O'Connor, Mintel 2003). Most commentators argue that spending on travel online will increase over the next ten years, particularly as high-speed Internet systems such as Broadband become popular in consumer's homes. The online travel industry will have to overcome the disadvantages that the consumer currently sees with online booking which are shown in Exhibit 12.2 below.

It can be seen from Exhibit 12.2 that the consumer has certain doubts in relation to online travel in 2004. These doubts of security, cash transactions and an apparent lack of brand identity all lead the consumer to feel insecure about online booking.

The low speeds associated with many Internet systems currently installed in homes may add a final level of frustration that forces the consumer to look to the high street for travel booking. This may change as online travel organisations with strong brand identities become better established and worries about credit card booking on the Internet are dissipated. Higher-speed Internet systems such

Exhibit 12.2

Consumer doubts with online booking



as Broadband will also make online booking more convenient for the consumer.

Online travel – the growth of the giants

The companies that have begun to exploit the online travel market are large companies that can afford the investment in the required technology and expertise. Many of the organisations shown in Exhibit 12.3 were formed in America, although European companies have begun to emerge in recent years.

The travel suppliers such as major airlines and hotel groups have begun to hit back at the new online travel companies by the establishment of their own online consortia to take bookings for particular airline seats, hotels or travel packages. Examples of these consortia are shown in Exhibit 12.4.

The future of online travel booking

It seems likely that there will be an increase in the number of travel products and services that are

booked online. Although it seems likely that many of these will be in the hands of independent companies or online consortia set up by the airlines and hotel groups, there is a considerable opportunity to small entrepreneurial travel companies who want to exploit the Internet to gain interest and bookings.

The era of the giants could well give way to a plethora of small specialist online retailers.

Discussion points and essay questions

1. Explore the reasons for the growth of online bookings in the travel industry.
2. Critically appraise the reasons why a consumer may not choose to book a holiday online. Discuss the ways in which an online travel company could alleviate the issues that you have raised.
3. Critically evaluate the lessons that the growth of online travel booking has for other areas of leisure marketing.

Exhibit 12.3

The main online travel companies

Expedia	Founded in Washington US in 1996. It offers a wide selection of products and services in the USA, UK, France, Germany, Australia, Canada and Italy. Uses superior technology to dominate the on-line travel market
Travelocity	Founded in 1996. Headquarters in Forth Worth, Texas. A child of the Sabre Corporation and uses Sabre CDS. It offers a wide range of products and services to all clients who are individuals or businesses
Priceline	Founded in Norwalk, Connecticut, the company was the originator of the 'name your own price' business model. It relies on price sensitive customers and excess capacities in the industry
Hotels.com	It offers a discount hotel room service. Started as a consolidator and moved to the internet in 1995
E-bookers	Originated in the UK based travel agency Flightbookers and launched in 1999. It now has a presence across Europe and has negotiated deals with major airlines. Also offers hotels, car-hire packages and holiday insurance
Lastminute.com	It operates in a range of European and other countries (Australia, South Africa and Japan). Offers last minute deals with the idea of matching excess supply to demand in the market place

(Source: Adapted from O'Connor, 2003 in Mintel)

Exhibit 12.4

The main travel supplier alliances

	Launch date	Owned by	Characteristics
Orbitz	2001	United, Delta, Continental, Northwest and American	Major focus on US airline sales
Hotwire	2000	United Airlines, American Northwest, Continental, US Airways, America West Texas Pacific Group	Discount air tickets, hotels and car rental
Opodo	2002	Aer Lingus, Air France, Alitalia, Austrian Airways, British Airways, Finnair	Discounted air fares with hotels and car hire
Travelweb	2002	Hilton, Hyatt, Marriott, International, Six Continents Hotels, Starwood Hotels and Resorts, Worldwide and Pegasus	Chain hotel bookings

(Source: O'Connor 2003, Mintel)

Case study 13

Tour operators' brochures and advice for tourists about safety

In recent years the issue of the advice which tourists receive from a variety of sources has become a subject of considerable debate in many countries where outbound tourism is a common phenomenon. There are several reasons for this, notably:

- (i) The series of high-profile problems that have increased fear of travelling since the late 1990s, namely:
 - terrorist attacks against aircraft and against tourists in countries as diverse as Egypt and Indonesia
 - high-profile attacks on backpackers in Thailand and Australia to give but two examples
 - the publicity given to the risk of Deep Vein Thrombosis (DVT) on long-haul flights
 - the outbreak of SARS that affected countries as far apart as China and Canada in Spring 2003.
- (ii) The fact that more and more tourists are travelling to long-haul destinations which are often very different to their own country and culture, with potential risks of which they are unaware.
- (iii) A number of tragic incidents involving individual tourists which have received widespread publicity, including everything from watersport accidents to being attacked by wild animals.
- (iv) Some tourists are now taking part in activities which are intrinsically more risky than lying on a beach or lounging by the pool, such as diving, parachuting, white-water rafting and so on.
- (v) The apparently growing willingness of tourists to take legal action against those tour operators who they feel have not made them fully aware of the potential risks involved in their chosen vocation.

It is not surprising therefore that there has been, and continues to be, a major debate going on about the amount of information a tourist needs about potential risks and their safety, and about from where they should obtain the information.

These sources of information include:

- the tour operators' brochure, given the power of the brochure in influencing tourists' purchase decisions and the fact that it is the tour operator who is the actual producer of the vacation package product itself;
- travel agents, except an increasing number of people, are now choosing to book direct without using agents;
- governments, given that most now offer their citizens a service by which they warn their own population of the risks involved in travelling to particular countries. However, governments are often accused of being over-cautious in their advice to the detriment of the tour operators' sales;
- guide books, but these are often out-of-date or very vague in their advice;
- the media, probably a very influential source of information for tourists, but they tend to over-sensationalise stories and seek out 'shock-horror' stories.

It seems an inescapable fact that, in relation to the package travel market at least, the tour operators' brochure has to play a major role in sensitising tourists to the problems they may face in a particular destination. However, as a source of valuable information, the brochure has great disadvantages. Most notably, the fact that it is written months or even years before the vacation is actually taken and so may well give an out-dated picture, given the rapidly changing nature of some risks.

Furthermore, tourists use brochures to choose holidays not to learn about all the things that could go wrong on their holiday. This is particularly true when the warnings are often vaguely worded and in small print at the end of the brochure.

On the other hand, it is difficult to criticise tour operators for they, in any business, would feature prominent warnings about the risks involved in buying their product, in a brochure designed to sell these products.

At the same time, there is a growing view that tourists too have a responsibility for their own safety and for informing themselves to reduce the dangers they may face on vacation. There is also a view that, often, it is the tourists' own inappropriate behaviour which can turn a small potential risk into a tragedy.

Nevertheless, it is still clear that tour operators have a responsibility to make tourists aware of issues concerning their safety in their holiday destination. Indeed, in some countries, this responsibility has been enshrined in legislation.

In this case study, therefore, we will look at how some leading UK tour operators deal with this issue, particularly in relation to long-haul destinations and places which are very different to the tourists' own country, in recent brochures.

1. *Tradewinds Dubai 2004* – This brochure contained a page of very detailed advice in four sections headed, 'travel advice', 'in resort advice', 'flight information', and 'general information'. This covered a wide range of matters, not all of which related to tourist safety. However, it appeared that most of this information was very general rather than being specific to Dubai. Indeed it looks as if this page was standard and not at all specifically related to Dubai as there was a section on 'in the tropics' and advice about hurricanes.

The advice was also quite generalised and, for example, directed tourists to consult doctors about health requirements at the Foreign and Commonwealth Office of the UK government regarding safety problems in the destination. However, this is probably wise as both types of issue can change rapidly and brochures can therefore become dated quickly. No specific information was provided for Dubai although the brochure did mention that building work was going on in the city which could have 'some visual impact'.

2. *Travel 2 Southern Africa, 2003–2004* – A detailed brochure with lots of information on the destination. It contained quite detailed information about vaccinations and the effects of too much exposure to the sun. Given that South Africa has a certain reputation for crime levels in some areas, it advises its clients 'If attention is drawn by your hotel guide to a local dangerous area, follow the advice'. It also says 'In Southern Africa, it is sensible to take the same precautions you would if travelling in any metropolitan city across the world'.

Tourists are also advised to consult the Foreign and Commonwealth Office for further advice, provided by the government. The brochure also offers advice on extreme weather in certain places such as cyclones as well as the presence of malaria, or not in each game reserve.

3. *Thomson Faraway Shores, 2004* – This brochure covers many different countries around the world. It includes some country-specific advice on each destination of which the following is an example:

- **Climate** – The climate is tropical. In June to November, heavy rainfall and high winds may occur. Hoteliers are generally well prepared for the occasional hurricanes that can develop.
- **Health and Hygiene** – The Caribbean is a developing region. It is therefore important that you take care to minimise the risk of holiday sickness. Pregnant women, the very young and old are particularly affected by stomach upsets. You should discuss your travel plans with your GP well before departure. Please also look out for additional information provided by Thomson during the in-flight video and on arrival in resort. Hot sun combined with alcohol and new foods can cause stomach upsets so bring remedies from home. Drinking bottled water and avoiding ice will help avoid problems. All Thomson hotels in the Caribbean have signed up to an approved food management programme which ensures the highest standards of health, hygiene and food safety. Under the programme, food and water supplies are treated regularly and hotel staff undergo rigorous hygiene training. Please see the Safety First section in the A–Z guide for important travel advice.
- **Health and Safety** – for health and safety reasons we do not recommend the excursions sold by beach vendors. All Thomson excursions have been fully inspected and meet all health and safety requirements.

Thomson Faraway Shores, 2004

Interestingly this advice says a lot about hygiene problems and stomach upsets and also warns of the potential risks of buying excursions from beach vendors. Some may argue this latter advice is motivated by commercial self-interest in that they wish the tourist to buy the Thomson excursions instead but there are

undoubtedly problems with trips offered by unregulated operators. In addition to this specific destination advice, the brochure contains more general advice in a 'Safety First' section at the end of the brochure.

4. *Premier Asia, 2004* – The brochure contains detailed general advice sections on 'healthcare and vaccinations' and 'safety and security'. This includes risks such as Deep Vein Thrombosis and hygiene standards in destinations. It also reminds tourists that, 'Cities the world over have their less salubrious areas'. These can sometimes be found in central locations and may be in close proximity to tourist areas. This brochure also has detailed sections on each specific destination. The Bangkok section talks about how pollution is being reduced but does not talk about the incidence of sex tourism in the city, except by saying 'its steamy (in more ways than one)' and its 'extremes of nightlife'. The section on South Africa does recognise the reputation of the country for crime in some areas but says 'Although some concerns about crime have been expressed, in reality, incidents in tourist areas are infrequent, and if you take proper care, it is no more risky than other destinations'.
5. *Libra Holidays, 2004* – The different brochures of this company included little advice relevant to specific destinations but they had two pages of detailed advice. As well as the usual advice offered, some interesting advice about safety in hotels, in some detail, included the following: *Personal Safety* – Wherever possible, you should make use of any safety deposit boxes that are available in your accommodation. Always remember to lock your door at night and when you go out during the day in the same way that you would at home. Most hotels and apartments do not employ a lifeguard.

Please ensure that children and non-swimmers are supervised at all times and observe the pool rules at your accommodation. We do not recommend any diving, however if you wish to dive, please check that the water is deep enough and that the property allows diving. You should also exercise caution around the pool areas since pool surrounds are often slippery when wet and you should not enter the pool after drinking alcohol.

If you are travelling with young children, make sure they are not left unsupervised on balconies. Keep balcony furniture away from

the railings so that they are not encouraged to climb up.

Few hotels and apartments are legally obliged to install 'toughened' or safety glass in their windows, doors, and glass cabinets etc. Please take particular care when walking through patio doors. It can be difficult to spot if they are closed in bright sunlight.

Identifying stickers should be in place on patio doors and other large glass doors. If they are missing, please bring this to the attention of your representative. Some hotels and apartment lifts do not have internal doors. This means that the inside of the lift is exposed to the lift shaft. If your hotel or apartment has this type of lift, make sure that you stand clear of the wall and never allow children to travel inside any lift without an adult.

Please read carefully all fire safety information which is available in your hotel or apartment.

On arrival, always familiarise yourselves with the nearest fire exits to your room or apartment.

Libra Holidays Brochure, 2004

6. *Virgin Worldwide, 2004* – This brochure contained general advice but it also noted which vaccinations were recommended in each of its destinations at the time the brochure went to press. It also gave readers information on how to access the Foreign and Commonwealth Office travel safety information. This advice was in a section in normal size print, headed 'the very important not so small print'.
7. *Jewel in the Crown Holidays, Goa 2003–2004* – This specialist brochure contained a lot of detailed information on Goa but says little about potential risks and safety issues except the currents that can make swimming in the sea difficult or dangerous. Of one ferry journey it says 'we crossed on the ancient Goan ferry . . . any UK Health and Safety Officer would have had a fit'. Perhaps this lack of detailed advice on safety and problems reflects the fact that Goa is relatively safe or that Jewel in the Crown clients are quite sophisticated travellers who are aware of the safety issues involved in visiting a destination like Goa.
8. *Bales Inspirational Journeys, 2004* – The Bales brochure contained a section of general advice entitled 'Ensuring your Safety'. It also said the company was working with hotels to implement UK health and safety standards in the accommodation in their brochures. Specific

health advice was given for each destination and the telephone number of a clinic which offers specialist advice on health and travel was given, as were details on the Foreign and Commonwealth Office website. Another section of the brochure contained information on the health problems associated with high altitudes, albeit in very small print. Finally the brochure promised that 'more comprehensive literature regarding health and safety will be enclosed with your final travel documentation and we strongly urge you to read this prior to your departure', although this again was in small print.

9. *Thomas Cook Signature, 2003–2004* – The brochure had several pages of detailed advice, including the following paragraphs, albeit in very small print at the end of the brochure.

Health, Safety and Security Abroad

The safety standards and regulations which apply overseas are those of the country you visit. Often they do not reach the same levels as in the UK. Because of this, general standards of safety, hygiene, fire precautions and so on can be of a different standard to those which we expect in the UK. The authorities in the country concerned may not have enough power or resources to monitor and enforce standards. As a result, please be careful when you are in unfamiliar buildings or surroundings.

Do not let non swimmers or children jump into a swimming pool without first checking the depth and how to get out. Please get to know your escape route in case of fire. Upset stomachs can happen in many areas often caused by the change of climate or ice-cold drinks and not as a result of local hygiene or food preparation. Any change to your diet may cause an upset stomach and the local water may not help. You should be sensible especially with raw food, drinking water and ice in drinks. You can reduce the risk of bites from insects by using repellents and covering up whenever possible – especially during the evening and at night.

We take the safety of our customers very seriously. If the Foreign Office advises that you should not visit a particular country, we will tell you and try to arrange another holiday for you. Crimes against people and property are a fact of life throughout the world and you have the same responsibility for your own safety as you do at home. In some places the local police

may not be very cooperative or interested when you report theft or need insurance confirmation so take care of your property.

Thomas Cook Signature Brochure, 2004

The 'Worldwide' brochure also included advice on the specifically recommended vaccinations for each destination.

10. *Travel and Latin America, 2003–2004* – The two pages of general information in this brochure had sections on the risk of altitude sickness and general health concerns. It also noted that travellers to Brazil require a certificate confirming they have been vaccinated against Yellow Fever. However, in the general information section, there did not appear to be specific advice about the dangers of crime in the big cities, although this is perceived to be an issue in some big South American cities.
11. *Latin America Travel, 2003–2004* – This brochure contained two pages of general information which included the following quite detailed safety-related advice:

Health

No compulsory health requirement is currently in force when travelling to the countries featured in this brochure, although many countries require passengers to hold valid yellow fever certificates if you are arriving from either Peru or Bolivia. The Department of Health recommends protection against yellow fever, tetanus, polio, hepatitis A and typhoid, and produces a useful booklet entitled 'Health Advice for Travellers' (T5), which is available free from your doctor, ABTA travel agent or our offices. We must emphasise that as requirements may change at short notice, you are responsible for ensuring that you take advice from your GP or appropriate medical authority.

Political Situation

Some Latin American countries have in the past experienced instability but it is fair to say that the countries we feature all now enjoy a settled political climate. Substantially increased foreign investment and closer association with the European Community indicate a consolidation of this stability.

Personal Security

Your holiday will be one to remember for all the right reasons providing common sense is exercised throughout and normal caution is taken. All over the world, and not only in our

featured countries, poverty and urban development lead to social problems. Tourists are rarely affected but when they have been an element of predictability was usually involved.

Jewellery and unnecessary luxury items should be left at home, and if such items must be taken, they should not be flaunted in a manner that could be regarded as provocative.

Hotel safety deposit boxes are nearly always available and should be used. The Foreign Travel Advice Unit may have issued information about your destination. You are advised to check on BBC2 (Ceefax) page 470 onwards, or on the Internet under <http://www.fco.gov.uk/>.

Alternatively you can contact ABTA on 0901 2015050 (calls charged at 50 p/minute).

Latin America Travel, 2003–2004

The authors surveyed over fifty brochures for this case study of which the above were merely a selection. From this whole survey a number of points can be made, as follows:

- Coverage of safety-related issues is usually contained in a nondestination-specific 'general information', usually at the end of the brochure, and often in smaller print than the rest of the brochure.
- Relatively little destination-specific advice was provided in the brochures.
- Some risks were either not mentioned or heavily played down, notably terrorism and crime, as well as the relatively high risk of using public transport in some developing countries.
- Sensibly, many brochures refer their customers to doctors or the UK government Foreign and Commonwealth Office Travel Advice for up-to-date advice given how rapidly things can change in destinations.

Conclusion

In recent years, there has been growing pressure on the tourism industry to provide more safety-related advice for tourists. However, it is clearly difficult for tour operators, for example, to find a balance between providing safety advice, raising awareness of issues and trying to actually sell their products. This was clearly seen in the brochures we surveyed where such advice is often relegated to the back of the brochure and presented in very general, nondestination-specific form. Nevertheless, tour operators are trying to raise their customers' awareness of potential problems more and more and, presumably, there is also a responsibility on tourists to take some responsibility for their own safety too.

Discussion points and questions

1. Critically evaluate the suggestion that tourists should take responsibility for their own safety and not rely on advice from tour operators.
2. Discuss the reasons why more and more tour operators are putting safety advice in their brochures.
3. Discuss the role of travel agents and the government in advising tourists on safety issues.

Exercise

Obtain a selection of tour operators' brochures for different types of holidays and a variety of destinations.

Compare and contrast the nature and volume of safety advice offered in the brochure, noting differences, and suggest the reasons that may lie behind these differences.

Case study 14

Leisure travel magazines and the Islamic tourism market

Very rarely do English language tourism textbooks or journals focus specifically on the Islamic market as a distinctive market. However, there is a rapidly growing market for vacations in the Islamic world. This growth is reflected in the existence of leisure travel magazines to mirror those of Europe and the USA, such as Conde Nast and Wanderlust. The authors thought it would be useful to analyse two such Islamic travel magazines.

1. *Islamic Tourism, Autumn 2003* – This 84-page magazine appears to be published four times a year with a cover price of around five US dollars (in Dubai at least). The magazine was only started in 2001 and is published in the UK, although printed in Beirut, and it has offices in Cairo, Berlin, Dubai, Amman, Casablanca and Malaysia. The magazine is clearly designed to appeal to Moslems of all nationalities, and the following extract from the editor's introduction to the eighth issue illustrates its mission a little:

The eighth issues . . . are concrete examples of what we intend to do for tourism and a good indication of things to come. Islamic Tourism has been borne out of a clear foresight of the need for a bridge between East and West in a world where we find polarisations and tensions on all levels of global relations. . . . we are determined to persist with our effort in providing a forum for tourism in the Muslim world and to encourage tourism between Muslim countries as well as between these countries and the rest of the world.

Islamic Tourism, Autumn 2003

The text is in Arabic and English equally and this eighth issue chosen at random contained the following articles:

- an article on the potential for river tourism in Iraq along the lines of that seen on the Rhine and Danube. The article has many suggestions for how such tourism could be developed, but in ways that ensure that 'Islamic social values and morals [are] . . . upheld so that Muslims, as well as foreigners, can enjoy Iraq's natural beauty without embarrassment'. The article ends with some inspiring words, namely 'River tourism may seem like a *Fata Mogana* in today's Iraq, but without hope nothing is achieved. Aren't we planning to make Iraq an international tourist destination?'
 - an article on the River Thames in the UK which is introduced by reference to the writings about the river by Arab poets, who had never seen it, in the 1920s;
 - an article on Andalusia, focusing on the heritage of eight hundred years of Islamic history and influence in the region;
 - an article on a major campaign launched by the Indian tourism industry to attract visitors from the Arabian Gulf. The article noted that the country received around 100 000 visitors from this region in 2003;
 - an article which promoted Djibouti in East Africa, which has almost wholly a Muslim population, even though French is the most widely spoken language;
 - an article on the Pakistan city of Lahore, described as 'the cultural hub of the modern Islamic state of Pakistan', offering a bundle of surprises, not least a lively film industry ('Bollywood'), fashion, and cuisine. There is a description of several of the most important mosques in the city;
 - an article on health tourism in Jordan including the Dead Sea and various individual baths and spas. The article included a section talking about new investment in health tourism facilities around the Dead Sea and its general;
 - an article about Ramadan in Egypt, explaining a little about how it is celebrated in Cairo;
 - an article by a London-based freelance journalist talking about the future potential of Iraq as a tourist destination once peace and stability has returned.
- As well as features, the issue also contained news items, particularly about a major tourism

trade fair and exhibition, the Mediterranean Travel Fair which took place in Cairo in September 2003, and the Third International Hospitality Forum, held in Amman, Jordan, in September 2003. It also gave a list of travel industry trade fairs and details of the East Mediterranean International Travel and Tourism Exhibition, due to be held in Istanbul in February 2004, and was expected to attract 800 exhibitors and 120 000 visitors. The issue also contained a number of advertisements, notably the following:

- The Aden Hotel in the Republic of Yemen
- India Tourist Board
- Daallo Airlines (Djibouti)
- Air Djibouti (Djibouti)
- Hilton Park Sudan and Khartoum Hotels, Sudan
- Arab News Network
- Arab-British Chambers of Commerce
- Lebanon-Ministry of Tourism.

Overall, the magazine was glossy with many full-colour photographic articles and was well written and very informative.

Interestingly, the pages in Arabic contain articles which appear to be slightly different from those in the English section. The English section contains many news items, including:

- four pages of news about hotels, primarily in the Gulf States. Interestingly, most of the hotels mentioned were owned by Western chains and their managers were generally Europeans;
- a page of news about Ramadan and the special services being offered to guests during Ramadan by Ritz-Carlton Hotels, together with a special Ramadan offer promotion from Inter-Continental Hotels;
- finally closing its tourism promotion office in Kuwait but opening a new one in Dubai, together with others planned for Damascus and Cairo;
- the fact that received 10 470 tourists from Kuwait in 2002, an increase of 41 per cent over 2001;
- a European couple getting married underwater in Egypt;
- Jordan attracting tourists for luxurious spa tourism holidays;
- the new tourism projects under construction in Dubai;
- special promotions from Hertz on car hire;

- news of new routes, marketing activities and new aircraft from Kuwait Airways, Oman Air and Qatar Airways;
- adventure tourism including Arab mountaineers, Russian hikers and the Crown Prince of Dubai attending an equestrian event in Ireland.

This issue contained eighteen pages of advertisements, most of which were for accommodation, including a two-page advert and editorial for the Hilton Kuwait Resort, with its Thai restaurant. It also featured two unusual elements, namely:

- a page of cartoons, in English;
- a page of consumer tests on cameras.

2. *Gulf Traveller*, December 2003 – Also 84 pages, this magazine was published in Kuwait and cost around four US dollars in Dubai at least. Its sub-heading was ‘The Arab World’s Travel and Tourism Magazine’, and it appears to have been created in 2000. Most of the text was in English but there were sixteen pages in Arabic in the issue we analysed.

The editorial in this issue was a plea for the various national airlines of the Gulf region to think about the potential benefits of combining to create one powerful airline.

The articles in this issue were as follows:

- one about Aswan, described as ‘The Jewel of the Nile’
- an article on eco tourism opportunities in Jordan
- a two-page guide on how to choose accommodation in general
- a double-page piece about the 46th National Day celebrations in Malaysia and the stepping down of Dr Mahathir Mohammed as Prime Minister
- four pages about Hong Kong, including advice on attractions for children
- two pages about the Music Fountain Monument in Kuwait
- a major feature on Sri Lanka
- a one-page guide to rail travel in Europe
- four pages about Pisa and its Leaning Tower
- a four-page feature on the attractions of Bosnia and Herzegovina, with its population where Muslims are the single largest religious group
- two pages about food safety and hygiene.

The general production standard was high and the magazine was in full colour.

Of the two issues, 'Islamic Tourism' was much more focused on matters of concern to Islamic tourists, unsurprisingly, while 'Gulf Traveller' was more designed to meet the needs of both Islamic and Western tourists. 'Gulf Traveller' was much the strongest in terms of news features and also contained some very basic advice sections for inexperienced travellers.

Both magazines were not quite as glossy or substantial as the major European or American leisure travel magazines and are very recent creations compared to these 'western' travel magazines. The editorials of both Islamic World magazines are more serious than those found generally in European and American journals, one showing a strength of having a mission to spread understanding between cultures while the other pleads for a Gulf region-wide airline.

The growth of leisure tourism in Islamic countries is important for the global tourism market because of its volume, but also because Islamic tourists have particular needs, in terms of their religion, for example, which hotels need to be aware of.

Secondly, for many Middle Eastern destinations, where terrorist activities have reduced visits by Western tourists, fellow Moslem tourists can be a very significant market as they tend to be more sympathetic to those destinations than non-Islamic tourists.

These magazines also show that Moslem tourists are also interested in visiting non-Moslem countries, and are doing so in every greater numbers.

Conclusion

Travel magazines promoting travel as a leisure and lifestyle activity have grown in popularity in many countries in recent years. Their emergence

in the last few years in the Islamic world is clear evidence of the growth of the tourism markets in these countries. However, as we have seen in these two examples, the extent to which these magazines focus specifically on Islamic tourists vary. 'Islamic Tourism', as its name suggests, is heavily oriented to the Moslem tourist while the 'Gulf Traveller' is broader and more general in its approach and could appeal easily to both Moslems and non-Moslems in the cosmopolitan world of the Gulf States.

Discussion points and questions

1. Discuss the ways in which you think a magazine aimed at the Islamic tourism market might differ from magazines such as 'Conde Nast' (USA) and 'Wanderlust' (UK).
2. Critically evaluate the idea that leisure travel and lifestyle magazines have a major influence on tourist behaviour.
3. Discuss the reasons why leisure travel magazines may not always be the best source of advice for tourists contemplating on taking a particular type of vacation or travelling to a specific destination.

Exercise

Obtain several leisure travel magazines from your own country (if there are no such magazines in your country you should endeavour to explain this situation).

For your chosen magazines you should analyse their content and suggest at whom you think they are aimed. You should then try and decide which you think would be most/least useful for tourists looking for holiday ideas and explain and justify your views.