

Place Branding: A Content Analysis of How Tour Operators Sell Kenya as a Tourist Destination on Their Official Websites

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Abstract

This paper is based on a study which examines the content and images of 100 registered tour operators' official websites in Kenya and to connect what is being presented in tour operators' websites and the association of a destination with the content and to suggest way forward in branding Kenya as a destination of choice. These websites were systematically analysed using content analysis technique. It focuses on the different tourist attractions presented by the tour operators on their websites. Data was recorded based on nine tourism product categories presented by the Kenya tourism board: Go on Safari, Explore Water Sports, Explore Events and Festivals, See Popular Site, Marine Parks, Conservancies, Visit the coastal areas, Visit the Highlands and Valleys, and Visit the Lakes. These findings show that these websites present a lot of information on experiencing a Kenyan safari, followed by visiting the coastal area. However very little information is given on the other areas or rather tourism products as well as communication and transportation issues until you contact them. This study would help travellers plan their trip but also promote this region as an important and interesting tourist destinations.

Introduction

The use internet and website in promotion of tourism destinations is growing faster. The total number of internet users in the world is estimated at 2.4 billion in 2012 with a growth of 566% in the year 2000 (Internet world statistics 2012 and Ulkarch, 2014) meaning over a quarter of the world uses the internet for travel services. This means that the internet is a distribution channel and a source of information about destinations. The advantage of the internet has made it possible to sell a destination in an instant. It has become an appropriate and accessible way of communicating with travellers from all over the world. The websites images and information can influence the decisions of the tourist. With the advent of the internet so much has changed from the way we work to the way we communicate and has also become a tool for stay-cations or home stay vacations. As for tourism, more and more travellers are depending on the Internet as their source of information and a tool to plan their vacation or motivation to choose a destination. It has also changed the way tourism organisation distributes and market tourism products (Buhalis and Licata 2002, Karupiah P et al 2008). Zhou & DeSantis, (2005) asserts that tourism information is one the most frequently accessed information on the Internet. Tourists are able to view tourism products and collect information before they decide and buy the journey The content in the various websites will tell which type of destination it is. For example when you see feature like waterfall, white sandy beaches and dolphins the immediate association maybe a romantic island getaway destination or if the images are jungles and the big five, it takes you to a safari destination. This study uses the Branding Pentagon model which helps to translate corporate strategy into branding policy by stating the branding principles, 'loading' the brand, choosing the desired positioning and translating branding into everyday action. A brand Embodies a whole set of physical and socio-psychological attributes and beliefs which are associated with the product (Simoes and Dibb 2001). It is more than shaping of distinctiveness: It is forging of associations. Branding is a deliberate process (Knox and Bickerton 2003)

Literature Review

The Dynamics of the Tourism Market

According to the World Tourism Organization tourist visitor arrivals, which were 922 million in 2008, are expected to increase to approximately 1.6 billion by 2020. Increases in disposable incomes and the growing appetite for travel by citizens of Europe (particular Eastern Europe/Former Soviet Republic countries), the Middle East, East Asia and the Pacific, are expected to fuel global travel growth. China alone is expected to generate 100 million outbound tourists by 2020, up from less than 15 million in 2009. According to the report published by UNWTO (2013), China's expenditure on travel abroad reached US\$ 102 billion in 2012, making it the top tourism source market in the world in terms of spending as shown in Table 1.1 below.

Rank	International tourism expenditure US\$ in Billions				Market share %
	2005	2010	2011	2012	2012
1. China	21.8	54.9	72.6	102.0	9.5
2. Germany	74.4	78.1	85.9	83.8	-
3. USA	69.9	75.5	78.7	83.7	-
4. UK	59.6	50.0	51.0	52.3	4.9
5. Russia	17.3	26.6	32.5	42.8	4.0
6. France	31.8	39.0	44.1	38.1	-
7. Canada	18.0	29.6	33.3	35.2	3.3
8. Japan	27.3	27.9	27.2	28.1	2.6
9. Australia	11.3	22.2	26.7	27.6	2.6
10. Italy	22.4	27.1	28.7	26.2	2.4

Source: UNWTO 2013

Over the past decade China has been, and still is, by far the fastest-growing tourism source market in the world. Thanks to rapid urbanization, rising disposable incomes and relaxation of restrictions on foreign travel, the volume of international trips by Chinese travellers has grown from 10 million in 2000 to 83 million in 2012 and their tourism expenditure abroad has also increased.

Together with the travel industry (i.e. including tourist transport, air travel but excluding commuter transport services), tourism contributed \$6.3 trillion to the global economy in 2011, equalling 9.1% to the world's GDP as a result of the direct, indirect and induced impact of this industry. With specific reference to developing countries, the World Economic Situation Report 2012 stated that they —remain net services importers, but their role as service exporters is continuously growing, especially in the transport and tourism sectors. World tourism is expected to continue the positive trends that have marked the industry in the past decade, and the next twenty years is expected to hold a steady annual growth. UNWTO estimates that tourism now contributes 30% to world exports of services, 6% to all exports, and 5% to world GDP. This puts tourism fourth in rank after fuel, chemicals, and auto products. Overall, the industry is expected to continue to grow rapidly in the long term. UNWTO's Tourism 2020 Vision forecasts that international arrivals are expected grow by 4.1 % p.a. between 1995 and 2020 to reach 1.56 billion by 2020. Of these, 1.18 billion will be intraregional, and 377 million will be long-haul travellers. It is projected that long-haul travel will grow faster, at 5.4% p.a. than intraregional travel, at 3.8% per annum.

The effectiveness of tourism web sites with regard to the dynamics

A Destination's attractiveness is believed to contribute to tourism destination competitiveness. According to "The Calgary Model of Competitiveness in Tourism" by Ritchie and Crouch destination's appeal refers to both destination attractors and deterrents (Ndivo R. M et al 2012). The model identifies attractors as including eleven elements: natural features, climate, cultural and social characteristics, general infrastructure, basic services infrastructure, tourism superstructure, access and transportation facilities, attitudes towards tourists, cost/price levels, economic and social ties and uniqueness. On the other hand, destination deterrents refer to destination security and safety (i.e. political instability, health and medical concerns, poor quality of sanitation, laws and regulations such as visa requirements). Such factors are a formidable barrier to visiting a particular destination (Wilde SJ and Cox C, 2008, Ndivo R. M et al 2012).

Criteria to evaluate the effectiveness of tourism web sites need to be developed for the advancement of the tourism industry. The earliest attempts to measure the effectiveness of web sites in general were purely subjective individual preferences such as "Cool Links", "Top Lists", and "Hot Sites" (Ho, 1997). Further efforts have taken the form of many awards that assess the web site's effectiveness using more systematic methods. Steiner and Dufour (1998) note that the significant changes in the Internet-based Tourism Information Systems have lead to are organization of the industry chain and changed the way key players in the tourism industry offer, gather and use information. With Internet technology, accessibility of information has moved from only professional travel agents in the 70s and 80s to end users in the 90s(Buechy, 1998; Chen and Sheldon, 1997). Internet also enables direct sales from supplier to customer, which has forced the repositioning of the traditional intermediaries (Eastman, 1998).

How tourism website presents its information determines the decision the consumer will make. In today's market the current tourists is very knowledgeable and are open to new ideas and transparency is vital. With the new paradigm, products will be increasingly tailored to individual tastes, electronic media will be inexpensively addressed to individual customers, and media communication will be two way. The heart of one-to-one marketing will be a focus on winning a greater share of each customer's business precisely because

marketers now have the computational power to remember every detail about customer's transaction history, including communication. Instead of trying to sell products to as many people as possible, the new game will be to satisfy each individual customer's needs (Peppers and Rogers, 1997). It is clear that company success on the Internet is determined by how much they cater for the needs of their consumers and how well they form relationships (Berger, 1998; Dwyer, et al, 1998; Ghosh, 1997).

Understanding Place Branding

Based on the projected brand identity, consumers should develop a relationship with a particular brand by generating a value proposition either involving benefits or giving credibility to a particular brand (Aaker, 1996; Konecnik & Go, 2008, Qu Hailin, et al 2010). In addition to the function of identification, a destination brand differentiates itself from its competitors based on its special meaning and attachment given by consumers. Generally, tourism destinations emphasize points of parity associations such as high quality accommodations, good restaurants, and/or well-designed public spaces (Baker, 2007, p. 101). Places have long felt a need to differentiate themselves from each other, to assert their individuality in pursuit of various economic, political or socio-psychological objectives. The conscious attempt of governments to shape a specifically designed place identity and promote it to identified markets, whether external or internal is almost as old as civic government itself. Thus any consideration of the fundamental geographical idea of sense of place must include the deliberate creation of such senses through place marketing.

How people perceive a place creates images and puts them at the heart of orchestrated activities, designed to shape the place and its future. The Challenge is ensuring the image becomes an influential mental map that is deemed favourable to the present circumstances and future needs of the place. Anholt (2010) contends that the direct objective of the brand is not defined by economic gains; rather the brand aims to achieve a positive reputation for the place, which in turn will report economic benefits. According to Anholt, the virtue of this advanced vision of a brand applied to a geographical space lies in its flexibility, which derives from its ability to unite market forces and human capital. López- Lita and Benlloch (2006: 51) argue along similar lines, positing, 'A brand must serve as the basis for marking out places, thereby promoting differentiation and thus enabling places to highlight anthropological and cultural differences, thus transcending their initial purely economic dimension'. Similarly, Fernández-Cavia (2011) posits that branding strategies are fully integrated into a global process of place development, in line with a prior marketing strategy. As such, the objective of a branding strategy of a place is not limited to projecting and communicating a certain image and reputation beyond its boundaries, rather its differentiating feature lies in the specific task carried out with the internal public (local population) in order to promote pride in residing in the area and to create a sense of belonging. A brand can be viewed within three contexts that is, the brand within the context of the nation and state (country/nation brand), where Nation branding becomes a requirement for places that wish to compete in a globalised world, as well as helping them to shake off certain stereotypes. This view is shared by Dinnie (2008 and 2011), who posits that in addition to attracting tourists, stimulating inward investment and boosting exports, nation branding also focuses its actions on increasing exchange-rate stability, re-establishing international credibility and investor confidence, increasing political influence, strengthening international alliances and, in general, improving the nation's image in the global arena. The brand in the context of tourist space (destination brand) Anholt (2005b) argues that tourism is often the most visible promotional aspect in the process of nation branding. This is due to the fact that tourism accumulates baggage of aspects related to the marketing of spaces, and this results in the presence of a wide-ranging literature related to the promotion, marketing and branding of tourism spaces. Rodríguez- Amat and Campalans (2010) proceed in the same vein when they indicate that tourism has become a mechanism which catalyses and concentrates the cultural and the symbolic, acting as a presentation interface connecting the interior outwards to the exterior. Tourism is thus positioned as a central axis of the processes which link together image, brand and territory.

What makes a great place brand?

According to Burghard M. E. (2009), three things make great brands: relevance, authenticity, and competitiveness. If a place brand promise is not relevant, then no amount of incentive dollars will get an investor to consider the location. Second, the promised experience must be consistently delivered; the talk and the walk must be aligned. Finally, effective place brand management is required. Decisions on public policy change and infrastructure improvement must be made with an understanding of their respective impact on the business climate. The better states are able to manage their brands, the better positioned they will be to compete for capital investment dollars.

Basically what Kenya has done is create a destination safari image which is carried by most competitors in Africa that is South Africa, Zimbabwe, Botswana, Namibia, and Tanzania

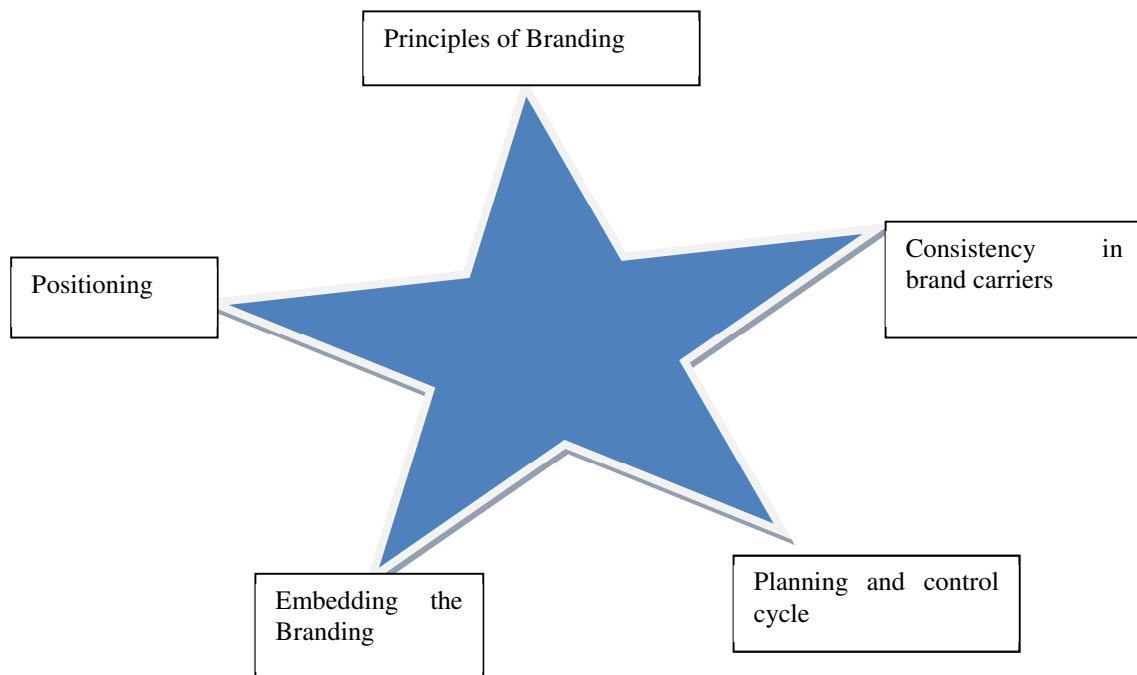
Unfortunately not all areas in Kenya are benefitting from tourism and popular tourist areas are chocking other attractions

Theoretical Underpinning

The branding pentagram Model

The branding pentagram is useful for organizations that are willing to develop or improve branding. It serves as a framework to define the brand and its strategy: who is the product or service for? What does the product or service do? How is it useful to me as a client?

A brand is the complete set of signals that surround a product, service or company. Branding is the process of managing these signals in structured and consistent way. The branding pentagram framework is a evaluating and elaborating five integral factors that influence branding strategy. The pentagram consists of five interrelated points: Principle of branding; Positioning; Consistency in brand carrier; Embedding the Branding; and Planning and control cycle. By covering these five points, an organization not only states its brand(s) and branding policy, but also incorporates relevant branding activities into the organization's daily practice.



The five point of the pentagram can be addressed by elaborating on the following aspects in the following order:

1. Principle of Branding: The principle of branding consists of? ; Branding Mission: which goals do I eventually want to achieve with the brand? ; Desired brand perception: What are the core values of the brand? Brand Architecture: What are my choices regarding the brand portfolio?
2. Positioning: The positioning of the brand can be chosen based on; Segmentation: which segmentation criteria are used? ; Target Group: Which target group(s) is the brand aimed at (Client/end user)? Position: How does the brand distinguish itself compared to (the critical success factors of) the competitors
3. Consistency in brand carriers: To maximise the brand, there must be consistency in the way the brand is carried. Consistency can be created by creating consistency in the way the brand is carried by the different products and services of the organisation and by how the brand is 'carried out' and spoken of by the employees of the organisation or the employees of an intermediary. Further consistency can be guarded via the different means the organization's culture and the behaviour of its employees.
4. Embedding the branding: This starts by ensuring consistency. The brand policy needs to align consistently with underlying functions and responsibilities and authority for branding should be assigned to one of the management team or board members. A person should be appointed who will have direct responsibility for branding. Branding should be embedded by anchoring it in the organisation's culture and the behaviour of its employees
5. Planning and control cycle: This starts with the formulation of SMART (Specific, Measureable, Achievable, Relevant, Time specific) targets of brand policy for both long and short term. Next, the planning and control cycle can be developed by determining the measuring method. The method must enable measurement of the degree of realisation. Furthermore, this method must give input and initiation to adjustment based on the evaluation.

'Branding' is optimal when the real brand experience is equal to the desired brand experience. In such a case, the branding confers a sustainable, competitive advantage; conversely, unsuccessful branding has a negative effect

on a firm's competitive advantage. Where brands are connected, bear the following in mind:

- Brands, and therefore branding are subjective by nature
- Many of the world's best brands are companies, rather than specific products. A brand can be just as easily be a service, an organisation or even an aspiration
- Brands can take many forms and are not just names, nor are they restricted to physical products

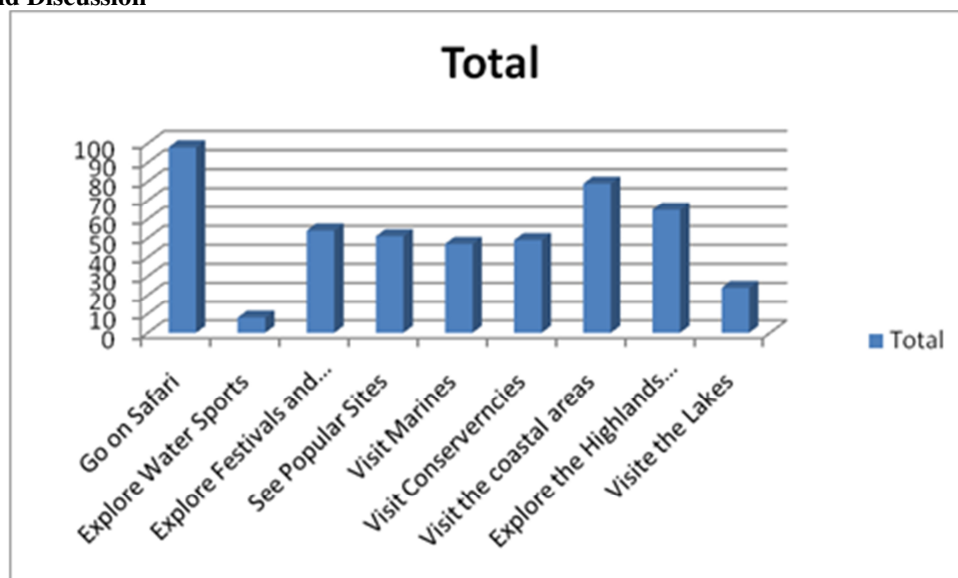
The model does not fill in the branding strategy of an organisation. It merely serves as a framework on which a company can build. The use of the model is therefore limited to which aspect should be borne in mind when elaborating a brand strategy, not what content of the aspect should be.

Methodology

The Internet and the Web are still too young to be thoroughly understood phenomena, but, as such, they are much studied. A great number of researches, surveys and investigations have been performed in the last years. Many of these deal with the behaviour of a cybernaut and on the features required to attain a good level of success in the promotional and marketing activities in the cyberspace (Barwise et al., 2002).

This study examined the content of 100 tour operators' websites. According to Kenya tour operators Association Kenya safari guide 2014-15 there are 339 registered members. This served as the sample population. Content analysis is a technique used to analyse text based on a predetermined set of categories in a systematic and replicable manner. It allows comparison of content of many texts and images and identity features or aspects of the text. The study focused on the different tourist attractions presented by the tour operators on their websites. Data was recorded based on nine tourism product categories presented by the Kenya tourism board: Go on Safari, Explore Water Sports, Explore Events and Festivals, See Popular Site, Marine Parks, Conservancies, Visit the coastal areas, Visit the Highlands and Valleys, and Visit the Lakes.

Results and Discussion



The results of the general evaluation for the website listed in figure 1 below indicate that Going on safari is the most marketed tourist activity in Kenya followed by beach based tourist activities. Looking at the distribution of the evaluations in the different activities (Figure 1) it can be noticed that the highest scores are generally achieved by image associated with Kenya as a Wildlife and Beach safari destination, that is if you want to see the big five (Lion, elephant, Leopard, buffalo, and the Rhino) and the Maasai People and their culture, and experience the white sandy beaches, Kenya is the place to be. These are aesthetic features which are prominently presented in every webpage. The main consideration that arises from these results is that, in general, fascinating graphic effects are preferred to useful and usable information about the destinations. Surprisingly, Internet, with all its multimedia prospective and the large storage capacity, seems to be still much under-exploited: besides that, interactive functions, such as the opportunity to arrange customized itineraries or to have real-time quotations and confirmations, are still very few. Designers are still using traditional approaches in advertising concepts rather than on a clear understanding of the habits and the preferences of Internet users. This has been confirmation of this fact comes from the analysis of the contents and services offered online by the websites studied.

It is widely acknowledged that tourism destinations must be included in the consumers' evoked set, from which an ultimate decision is made (Cai, Feng, & Breiter, 2004; Dana & McClearly,

1995; Leisen, 2001; Tasci & Kozak, 2006; Qu Hailin et al 2010). However, in Kenya's perspective, consumers are generally offered specific destination choices that provide similar features such as quality accommodations, beautiful scenic view, and a diversity of wildlife, white sandy beaches and friendly people as a result, Kenya is widely viewed and/or perceived as a mass market. This has seen the growth in the number of visitors visiting famous national parks and reserves like the Maasai Mara national reserve, Nairobi national parks to a point their aesthetic value is almost lost due to overcrowding. From this perspective, the concept of destination branding is critical for a destination to be identified and differentiated from alternatives in the minds of the target market.

Place Branding Challenges for Kenya

Table 1 Summary of Place Branding Challenges

Characteristics (Branding)	Place branding as a problem (Positioning)	Development process as a challenge (Brand carriers, embedding the branding and Planning and control cycles)
<p>The Problem- 1. There is need to diversify tourism products in Kenya. 2. No agreement exists about what the problem is. 3. Each attempt to encourage diversification creates a solution on paper. 4. There is a disconnect between the needs and wants of tourist and what is being offered</p>	<p>Destinations are multi-service products and therefore are often of interest to a wide range of audiences. "Conflict may arise, both within and between these segments, as a result of the different needs of each audience" (Hankinson 2007, 249) What the country has is already developed destinations and that is what is being marketed. A call for diversification means new products and services in other areas There is no a prior solution on what should be marketed (Gilmore 2002).</p>	<p>Interconnectedness, complicatedness, uncertainty, ambiguity, pluralism and conflict, and societal constraints (Lang 1988) Potential tensions surround the drive towards the production of high quality product and Services and regional specialties. "Who will move forward and profit from this new development? Will it be large-scale tourism organizations or new and upcoming tourism firms</p>
<p>The role of stakeholders Many stakeholders are likely to have differing ideas about the 'real' brand of the place</p>	<p>"Place branding is a long-term endeavour. It need not and should not cost more than any place can comfortably afford, but is neither a quick fix nor a short-term campaign" (Anholt 2003, 220)</p>	<p>The concept of place identity is ambiguous and dynamic subject to on-going social processes (Messely et al. 2009)</p>
	<p>Place branding addresses multiple stakeholders (Ashworth and Kavaratzis 2009). "There are widely different agendas to be found among the stakeholders of a national or regional brand" (Anholt 2003, 225)</p>	<p>Tourism development is multi-facetted in nature. It unfolds into a wide array of different and sometimes interconnected practices</p>
<p>The stopping rule The end is accompanied by stakeholders, political forces, and resource availability. There is no definitive solution</p>	<p>Place Branding needs to achieve "a balance between applying cutting-edge advertising and public relations approaches to a marketing problem and the real politic of managing local, regional, and national politics" (Morgan 2002, 339).</p>	<p>Despite concerted efforts by both state agencies and private-sector firms, change has proven to be a Challenge.</p>
<p>Nature of the problem Solution(s) to problem is (are) based on "judgments" of multiple stakeholders.</p>	<p>"Settling on a common Strategy that considers all stakeholder interests and which meets the criteria of relevance for targeted place consumers and differentiation from competing places is likely to be a cumbersome task." (Therkelsen 2008).</p>	<p>Participatory approaches to tourism development has been emphasised in order to ensure that existing resources are put to the best use and benefit all stakeholders equally for sustainable development</p>
<p>There are not shared values with respect to societal goals.</p>	<p>"Often local communities may distrust new initiatives and are less likely to take ownership of the brand if there is a tension between economic regeneration and communities in managing the urban environment". (Trueman et al. 2007, 23)</p>	<p>"Policy objectives may be decided either within the Local area or from outside. Problems arise when one group looks only at its own objectives without taking account of the need for compromise" (Pevetz 1980, 36).</p>

Adopted and modified from Batie and authors' elaboration (2008).

The above table suggests that Kenya might not really have a brand that distinguishes it from the rest of Africa, it

is a destination for the mass market because it considered relatively cheap compared to other destinations. Tourism brand building is primarily achieved through product development and marketing, and if branding means logo and packaging design it will definitely contribute towards the marketing process. If clients buy a product and services and find it excellent, this will begin to create a powerful brand image for the product and services. The ranking and reputation will go up and gradually spreads to potential new markets. Even people who have no idea about the tourism destination will know, or feel they know, that it is a good product. The reputation spreads, drives up sales, and increases the value of the corporation. It is certainly one of the most significant factors of business success. However Branding Kenya should have different and straight forward technique for building brand equity as opposed to a general term covering all marketing communications techniques. Branding should give a tourist destination respect and should create interest, which results in client experience of the product and services which, if satisfactory and shared, results in brand equity, thereby making it a principle asset to the country.

It is clear that if Kenya is serious about enhancing its international image, it should put effort on national equivalents of Product development and effectively market those products rather than chase after the tired products and look for new experiences for return and new clients. Otherwise Kenya will continue with its incompatible, uncoordinated and broken stream of useful, noticeable, relevant ideas, products and services and policies that could possible contribute to enhancement of Kenya as a Tourism destination with a difference.

Conclusion and recommendations

Place brands are defined above all by the influence they exercise over the perceptions of individuals. The application of a unique identity expressed through a brand offers recognition and differentiation for geographical spaces, thereby allowing for an advantageous position which, in turn, becomes decisive in the preferences of users. Furthermore, a place brand involves the simultaneous exercise of both management and communication. This management is not limited to brand management, rather it involves intervening within a space in accordance with brand criteria and, ultimately, marketing.

A place brand must therefore respond to three principal objectives, which are, in order of importance: a) positioning; b) a sense of ownership of the brand and identification with it on the part of local communities and, finally; c) the brand must act as a mechanism through which to generate positive perceptions of the space it represents. In addition to this, it should be noted that the creation of an identity is the element which best enables a place to set itself apart and stand out.

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