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TOURISM STRATEGIES OF THE NORTHERN EUROPE: COMPARATIVE ANALYSIS

Abstract. *The formation of models and visions for tourism development in the world's countries differs not only in approaches and tools, but also in the detail and specification of States. Forming the image of the country, strategic development guidelines, defining the contours of tourist projects, understanding the forms of support for the business sector, as well as the development of standard-setting practices is impossible without a clear representation of the target audience. This article discusses the practice of developing national tourism strategies in Greenland, Sweden, Finland, and Norway. These territories are chosen as a comparison base, since the basic environmental conditions in them are almost identical, which complicates the formation of unique strategic landmarks. However, the analysis of documents, national strategies have been identified in the basic terms, which are based on country factors, which emphasize in the future, the conditions that created, creates and will create in the long term for the business sector. Within the framework of national strategies of the Northern EU countries, the mission and vision are set out, key segment groups are fixed, the structure of communication between consumer groups and tourist offers is set out, and the institutional framework for tourism development is set out. It is noteworthy that, in General, all strategies are road map projects, written in the spirit of project management. Recognizing the conditions for sustainable and responsible tourism as a base, the Nordic countries' tourism strategies include requirements for all project parties: tourists, tourist companies, tourist associations, and government representatives.*

Keywords: *tourism strategies, Greenland, Finland, Sweden, Norway, comparative analysis, image of the territory, target audiences.*

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СТРАТЕГИИ ТУРИСТИКИ СЕВЕРНЫХ СТРАН ЕВРОПЫ: СРАВНИТЕЛЬНЫЙ АНАЛИЗ

Формирование моделей и видения развития туризма в странах мира различается не только подходами, инструментами, но и детализацией, спецификацией государств. Формирование образа страны, стратегических ориентиров развития, определение контуров туристских проектов, понимания форм поддержки предпринимательского сектора, а также развития нормотворческой практики невозможно без чёткого представления целевой аудитории. В данной статье рассмотрены практики разработки национальных туристских стратегий Гренландии, Швеции, Финляндии и Норвегии. Данные территории выбраны в качестве базы сравнения, так как базовые условия внешней среды в них практически идентичны, что усложняет формирование уникальных стратегических ориентиров. Тем не менее, представленный анализ документов национальных стратегий, позволил выявить базовые условия, на которые опираются страны, факторы, на которые делают упор в перспективе, условия, которые созданы, создаются и будут созданы в перспективе для предпринимательского сектора. В рамках национальных стратегий стран Северной Европы прописаны миссия и видения, зафиксированы ключевые сегментные группы, прописана структура связи групп потребителей и туристских предложений, прописана институциональная база развития туризма. Примечательно, что, в общем и целом, все стратегии представляют собой проекты дорожной карты, написаны в духе проектного менеджмента. Признавая в качестве базы условия устойчивого и ответственного туризма в рассматриваемых туристских стратегиях странах северной Европы зафиксированы требования ко всем сторонам проектов: туристам, туристским компаниям, туристским объединениям, представителям органов власти.

Ключевые слова: туристские стратегии, Гренландия, Финляндия, Швеция, Норвегия, сравнительный анализ, образ территории, целевые аудитории.

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Introduction

The issues of planning and implementing tourism development strategies in the world have recently become more relevant.

This happens for many reasons. First you can pay attention to the appearance of more and more on-line tour operators and other tourist marketplaces that allow tourists to make choices within the framework of the restrictions established by the systems. This, in turn, leads to the natural process of the entire system of tourism industry evolution, when tour operators can use flexible tools to work with consumers, and travel agents have to evolve and take on the functions of an individual consultant, trying not just to select a packaged tour within the budget of the final tourist, but they try to adjust the whole system of proposals for the desires of each individual person.

In addition, external factors, such as environmental problems, epidemics, wars and conflicts in different parts of the world, the similarity of states to each other by natural and social factors, and others, leave their imprint on countries forming their own tourism strategies.

The evolution of tourist preferences, determined both by the macro and the microenvironment of the external environment, gives people the opportunity to choose, accept a choice that involves a combination of rational and non-rational (emotional, behavioral) factors. Consumers are free in their preferences and satisfaction of tourist needs. Currently, the states, aimed at developing the national tourism sector are faced with the task of offering such a tourist service that will definitely surprise, cover the expressed need of the tourist and be considered individual and special.

But today it is difficult to achieve such a system of relations (state - society - tourist), since the totality of external restrictions, increased competition and a limited set of factors that may be attractive to tourists are not always widely represented in individual territorial spaces of states.

From the point of view of the territorial factor, a large States can offer tourists a variety of tourist services (for example, Russia, the USA, China and some others). In large

states, various climatic zones and diverse natural landscapes are most often represented. As for small states located in approximately the same climatic zone with the same natural territorial resources, the situation is complicated of the need to establish originality, those factors that will determine the growth points on which states will rely on in their tourism strategies.

Tour operators of such countries should also be unique, providing tourists with the opportunity to choose not so much in the price factor, but in gaining new experience, new knowledge.

Discussions

When considering the development of tourism strategies at the state level, it is necessary to address a significant number of environmental factors, which can include not only political, interstate, but also natural and climatic, social and other factors.

In this article [9], the author determined that the quality of the national tourism strategy is important to study and form in a comparative format, because such benchmarking allows you to identify similarities, differences in territories and conditions that develop on them [11].

Dr. Augustin M. M. points out that the sustainable development of tourism should be based on the motivation of travelers [2]. Sustainability, in her opinion, is determined of both economic factors (national welfare, employment, the national currency rate and price stability) and non-economic factors (political, technological, demographic and other factors, as well as the lifestyle of the local population).

In the Paper of Riege A. M. and Perry C. [8], it is determined that the tourism development strategy should be based on three approaches: consumer orientation, competition orientation, and promotion orientation. The idea of sustainable tourism based on relations with stakeholders is developed in the article Waligo V., Clarke J., Hawkins R. [12]. At the same time, a very important basic element of tourism development at the state level should be a solid Foundation at the level of business units in the state itself. The development strategy, as a General direction, should be based primarily on patronage and

the development of partnerships between organizations. At the same time, the entire process of rulemaking should be focused on increasing the commitment of local organizations to the interests of developing not only their own business, but also tourism in the state in general [7].

The quality of the national tourism strategy should include such components as deep marketing analysis, technologies for promoting tourist services, based on the expectations of tourists, cooperation with local communities, and the choice of acceptable ways to communicate with customers [10].

Table 1 – Indicators characterizing some key features of the tourism industry

State / Territory ¹	Revenues from the tourism industry (at current prices)	Number of people employed in tourism	Average monthly salary in the industry (national currency)
Greenland*	718.7 mln. DKK	1909	20915 DKK
Finland**	3.102 mln. EUR	N/D	3277 EUR
Norway***	176618 mln. NOK	N/D	38690 NOK
Sweden****	129 945 mln. SEK	264000	34592 SEK
Russia*****	60475445.5 RUR (for the 1 st half of 2018)	48443 (data for 2015)	33260 RUR

Thus, we can note that from the academic point of view, the formation of a national tourism strategy has important to determine not only the image of the desired future or some areas that the authorities suggest focusing on, but to go along a completely different path. So, the image of a potential tourist, his expectations and opportunities must be as a reference base. In addition, strategies should reflect the capabilities of territories (social, technological, cultural, etc.) in a matrix way to “cover” the needs and expectations of tourists as effectively as possible.

Results

Countrywide Review

In this article we will focus on European countries that are in the same climate conditions, the socio-economic situation of the local population - these are the countries and territories of Scandinavia: Greenland (Danish territory), Norway, Sweden and Finland.

In these countries there are the same climatic conditions approximately, which leaves its mark on the development of air and sea communications. Social issues are also identical. In the Arctic territories there is an outflow of economically active population due to lack of jobs.

However, statistics show that income from tourists in the countries and territories under consideration is high.

For comparison, we present a comparative analysis of data at the last reporting date of national statistical offices (without currency conversion) (table 1).

Without the need to unify the presented figures and their graphic expression, it is clear that tourism revenues in the Scandinavian countries are significantly higher than in Russia.

This situation can be explained from different angles, namely, the presence of a single political space, the historically developed infrastructure for tourism, as industries and other features.

Notice that the similarity of climatic and geographical factors of the studied countries is quite high, the differences are some cultural, architectural features.

In this article, we will try to analyze the totality of systemic factors on which the states in question base in the development of the tourism industry in their own right.

The analysis will base on regulatory documents, strategic programs, as well as systems of relations with the external environment in order to highlight some successful practices of strategic planning in the tourism industry.

Greenland Experience

Greenland's tourism development strategy base on the national strategy of the territory as a whole. It involves a wide involvement in its implementation not only of the business community, but also of the local population at all levels of its implementation.

¹ *bank.stat.gl; **www.stat.fi; ***www.ssb.no; ****www.scb.se; *****opendata.russiatourism.ru

The tourism strategy covers all parties: from tour operators directly working with tourists, as well as indirect parties, such as municipal administrations engaged in providing basic conditions conducive to the development of tourism. In addition, educational institutions are also included in the system of relations, which create and disseminate new knowledge about the territory and field of activity [6].

In Greenland, a tourism development strategy for 2016-2019 “Visit Greenland” was developed².

The starting points of the strategy were identified:

- analysis of the current state of tourism,
- planned improvements in infrastructure and conditions for tourism,
- development of a regulatory system for the tourism industry,
- positioning of the territory in the international market.

The following work areas have become the target indicators of tourism development in Greenland:

- Statistics and Documentation. It provides for the detailed collection of information about tourists arriving in Greenland: distribution by segments, motivation for visiting in a regional context.
- Season Expansion A focus was set on expanding seasonal destinations, leveling the risk of subsidence of tourist demand in the off-season and leveling the risk of low season through the creation of projects and their active media promotion.
- Market Development. It provides for the creation of conditions for collaboration between national and foreign tour operators in the creation and promotion of joint projects through the North Atlantic Tourism Association. In addition, the FAM Trips and workshops are planned.
- Accessibility and Framework Conditions – There is a framework law by which Greenland tour operators can conduct their tourism projects in a municipality without fear of the risk of competition from foreign tour operators

offering similar projects in the territory. But this condition is ensured after the home tour operator has invested in product development and aims to create the basis for cooperation between national and external tour operators.

- Visibility. It provides for the development of the national Internet portal Greenland.com, through which sub-sites are also developing: Cruisegreenland.com; music.greenland.com; film.gl; Corporate.greenland.com and others, each of which has as its goal to create a positive way of life and culture of Greenland, its attractions, infrastructure, to help the business community and tourists get the right idea about the destinations and the experience offered.

The tourism strategy based on a retrospective analysis of real data on the arrival of cruise liners and flights.

In particular, due to the peculiarities of the territorial location of Greenland, it was possible to develop an interesting system of collecting statistics³. It allows to keep records in detail on the following parameters:

- countries from which tourists reside
- Segmentation by purpose of tourist arrivals both at the territory level as a whole and by municipalities (Ethnophile; Authenticity Seekers; Culture Lover; Culture Appreciator; Sigheer; Globetrotter; Wilderness Seeker; Nature Lover; Nature Appreciator; Extreme Adventurer; Special Interest Adventurer; Special Interest Adventurer). The “one-size-fits-all” segmentation is recognized as ineffective in Greenland, and therefore, each individual tourist product must be adapted to the needs of various types of travelers.

Segmentation of clients in terms of development allows the tourism industry, on the one hand, to choose suitable offers from local operators for tourist services, and on the other, the creation of individual projects to meet the needs of targeted tourists, starting from tourist offers already created in the territory of municipalities.

As part of this strategy, it was also envisaged to reduce the tax burden for arriving sea cruises, which allowed to reduce the cost of passenger transportation by large sea transport operators.

² Greenland, Visit Greenland, “Tourism Strategy 2016 – 2019 Visit Greenland” (2016) Tourism Strategy 2016 – 2019 Visit Greenland. URL: traveltrade.visitgreenland.com/wp-content/uploads/2019/08/turismestrategi_eng_light_senest.pdf

³ Takornariaqarnermit Kisitsisaatit. (n.d.). Retrieved February 7, 2020. URL: tourismstat.gl/?lang=gl

To attract attention to Greenland as a tourist destination, the strategy recorded the need to increase Greenland.com online presence through Google, Facebook, Twitter, Instagram and others.

In Greenland, they achieved the addition of their territory in such tourist projects as Lonely Planet Top 10 “Best Travel” and Top the National Geographic Traveler “Best Tours”. This has given Greenland a steady boost in tourist demand since 2016.

As a complement, Greenland has directed efforts to create combined tourism projects with neighboring countries, such as Iceland, Denmark.

As a legal regulation in the field of tourism, a law on concessions has adopted, which guarantees Greenland tourism companies a reduction in the risk of competition from foreign tour operators offering such tourism products in various municipalities of Greenland.

In addition, within the framework of the concession agreement, it defines the fundamental principles of sustainable and responsible tourism for the owners of the Greenlandic business.

Finland experience

In Finland, tourism strategy base on the following key points:

Orientation to the formats of sustainable and responsible tourism, especially in the Arctic regions, as well as the teaching of staying tourists on these basics⁴.

Widespread digitalization of the tourism industry.

As in the case of Greenland, Finland has created a comprehensive tourism statistics system “Tilastotietoja suomen matkailualalta - Rudolf”⁵. In particular, in the public domain, materials are published on the forecast nature of the tourism industry as a whole and certain types of management in particular, barom-

eters of the state of small and medium tourism businesses, which is extremely convenient for a systematic approach to developing strategies at the level of each particular company.

As part of strategic planning for tourism development in Finland, emphasis has placed on the development of individual age groups of tourist generations (Y and Z). As a priority vision of tourism, in Finland they see the development of increasing the role of domestic tourism in relation to inbound tourism (20 billion euros against 8 billion by 2028)⁶.

In Paper of Bohn D. there is determined that the effectiveness of the tourism strategy in Finland - the Advisory tool of all stakeholders [3].

It should be noted that the tourism development strategy in Finland is written in the spirit of creating an institutional environment for sustainable tourism, rather than in the “dream / vision” format of what tourism can hypothetically be in the country. For example, the following development tools have been recorded for responsible consumption: brand of sustainable travel in Finland; training travel companies in creating and maintaining sustainable business factors (growing customer base, rational use of natural resources, using Finnish cultural heritage in projects, etc.); investment in domestic tourism marketing; Reducing the impact of seasonal phenomena through thematic alignment with programs of natural, cultural, luxury and other types of tourism.

Norway experience

Norway's state tourism strategy prioritizes 3 components⁷:

- increase in tourism profitability;
- sustainable development of rural communities and their involvement in the tourism sector⁸;

⁴ Suomi entistä kiinnostavampi matkailukohde kansainvälisesti, erityisesti nuoret innostuneet kotimaan matkailusta (2019). Kevään 2019 toimialojen näkymät. Työ- ja elinkeinoministeriö. Matkailuala. URL: julkaisut.valtioneuvosto.fi/bitstream/handle/10024/161641/Matkailualan_nakymat_kevat_2019.pdf

⁵ Tilastotietoja Suomen Matkailualalta, Business Finland. (n.d.). Retrieved February 7, 2020. URL: businessfinland.fi/suomalaisille-asiakkaille/palvelut/matkailun-edistaminen/tutkimukset-ja-tilastot/tilastopalvelu-rudolf/

⁶ Yhdessä Enemmän – Kestävää Kasvua Ja Uudistumista Suomen Matkailuun. Suomen Matkailustrategia 2019–2028 Ja Toimenpiteet 2019–2023. URL: julkaisut.valtioneuvosto.fi/bitstream/handle/10024/161906/TEM_2019_60.pdf?sequence=1&isAllowed=y.

⁷ Norway, Norwegian Ministry of Trade and Industry, “The Government’s Tourism Strategy. Valuable Experiences National Strategy for the Tourism Industry”, Norwegian Ministry of Trade and Industry, 18 Dec. 2007. URL: regjeringen.no/globalassets/upload/nhd/vedlegg/strategier2007/engelsk-utgave---hele.pdf

⁸ Tourism Strategy for Innovation Norway 2014-2020. Tourism Strategy for Innovation Norway

- Positioning Norway as a sustainable destination.

As part of the tourism strategy in Norway, the project “Tourism in the cradle of Industry” has been developed, which provides for the creation of tourism projects for industrial cities, as well as small settlements in the country. A key feature is assistance in developing networking with potential partners, as well as “packaging” the project to increase its international attractiveness⁹.

As measures to promote Norway and its separate territories, the Government’s tasks include the following:

- efforts to develop short-term tours in the country;
- Promotion of national cuisine as an attractive factor [5];
- collaboration between land and cruise tourism;
- development of agriculture as an element of green tourism.

It is noteworthy that the Norwegian tourism strategy contains not just the types of tourism that they plan to develop, but there is an arena of projects that center this or that attracting factor for tourists presented. In the arena of development projects, such directions as: innovative mountain tourism; innovative fjord tourism; Cluster “Tourist Arena Finnmark”; “Innovative experience”; tourist cluster “Convex”.

Implementation of the provisions for the development of tourism in Norway, the Government has been identified and fixed measures to support and develop certain provisions and directions of the strategy with tactical tools, indicating specifically the performers and tasks and how this or that task should be performed.

Sweden experience

The Swedish tourism development strategy “Nationell strategi för Svensk besöksnäring”¹⁰ base on the slogan and the

eponymous program “Visit the Future”¹¹. At the same time, the basic conditions should be not only the convenience and comfort of potential tourists, but also options for environmentally friendly travel options [1].

It is noteworthy that as a support for the hospitality industry, VAT for the industry will decrease to 12%, for the restaurant service industry – to 19%, while for all other sectors of the economy, VAT is 25%¹².

In their article by Mattsson K. T. and Carson D. A. pay attention to such an important component of the tourism strategy as providing conditions for the correlation of business priorities and personal goals of business communities [4].

It is noteworthy that, as in the rest of the strata considered in this article, the strategy for the development of Tourism in Sweden base on a detailed analysis of the industry, where all the strengths and weaknesses are highlighted a thorough statistical analysis is carried out before each development directions are presented in the proposals¹³.

The following are identified as priority segment groups in the strategy:

DINKs (Double Income, No Kids),

Active Family

WHOPs (Wealthy, Healthy Older People).

In order to create a tourist image of Sweden, the strategy fixes such positions as: Urban Nature, Swedish Lifestyle Natural Playground, Vitalised Meetings.

Conclusion

So can be notice that the Scandinavian approach to the formation of national tourism strategies is a clarity in the presentation of development directions, which are determined by a detailed statistical analysis of both the internal situation of the tourism industry and external circumstances.

2014-2020, Innovation Norway. (2014). URL: innovasjon Norge.no/globalassets/reiseliv/tourism-strategy-innovation-norway-2014-2020.pdf.

⁹ “Innovation Norway’s Mandate.” (n.d.). Sustainability and Tourism in Innovation Norway, Innovasjon Norge, business.visitnorway.com/no/barekraftig-reiseliv/sustainability-and-tourism-in-innovation-norway.

¹⁰ “Nationell Strategi För Svensk Besöksnäring” Svensk Turism AB, Svensk Turism AB. (2019), www.svenskturism.se/strategiarbete

¹¹ Jämtland Härjedalen “Jämtland Härjedalen – leaders in nature-based experiences” Strategy 2030: For the Tourism Industry. (2016). Jämtland Härjedalen “Jämtland Härjedalen – leaders in nature based experiences” Strategy 2030: For the Tourism Industry. URL: jht.se/wp-content/uploads/2018/08/strategy_english_lowres.pdf

¹² Strategiprocessen. URL: visitthefuture.se/travel

¹³ Vision for Sweden 2025. (2014). Boverket april 2014. Karlskrona, Sweden. URL: [boverket.se/globalassets/publikationer/dokument/2014/vision-for-sweden-2025.pdf](https://globalassets/publikationer/dokument/2014/vision-for-sweden-2025.pdf)

Of course, strengths include components such as:

- emphasis on the current situation,
- analysis of tourism infrastructure, as well as emphasis on the difference in conditions in different regions and municipalities,
- perfection of statistics in the field of tourism and hospitality,
- Consideration as a centric idea of the foundation of sustainable tourism and green technology.

Also, it should be noted that, being in similar climatic, economic, territorial and cultural conditions, when the competition is extremely high, the countries in question do not seek to resort to dumping policies. In their strategies, they identify thematic areas, as well as fix the target audience, thereby focusing all attention on very spe-

cific growth points, and not abstract reflections on what else could be developed without a specific vision of this very development.

So, summarizing the practice of tourism planning in the countries under consideration, it can be distinguished that such items as:

- what kind of service will be provided to the selected segment groups;
- how specific will this service be provided;
- what service will not be provided to the target audience.

When analyzing the tourism strategies of Greenland, Finland, Sweden and Norway, an extremely interesting position stands out that the target audience is defined as mature and thoughtful, knowing exactly what to want from visiting the country.

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