

Towards a holistic understanding of country of origin effects? Branding of the region, branding from the region

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Abstract

Nations and regions have images, or “brands” that stakeholders often attempt to manage or at least influence. In turn, many products have an association with a region or place, sometimes positively, and sometimes negatively so. These associations interact and shape each other. In this paper we thus argue that for a holistic view of country-of-origin effects, an understanding is needed of both branding *of* the region, and branding *from* the region, nation or place in question. Country-of-origin (COO) research has tended to focus upon how geographical associations may assist the marketing of certain products (halo effects) and indeed protect brand images from negative place-based associations (shield effects). The role of symbolic value here is discussed with the explicit assertion that its importance is increasing and that COO effects can be seen as an example of thereof; although these are likely to vary with the product or indeed place under consideration. We seek to develop these ideas by investigating the existence of branding spillovers in the opposite direction i.e. *from* product *to* regional image. This is done using the case of Wales via an investigation of three companies engaged with the changing meaning of their own country of origin – and also of the recent marketing initiatives of the Welsh Government itself. In this way the paper seeks to contribute a place-based bridging of the destination management literature and the brand management literature.

Keywords

Country-of-origin, Place-branding, Product branding, Regional culture, Symbolic value, Wales

1. Introduction

Many products present intangible or immaterial qualities in the market place, which in turn may be implicitly linked to their region of origin (Kotler & Gertner, 2004; Liu & Johnson, 2005). Moreover, this relationship between place and product is a potentially complex one, as we discuss below. The marketing literature typically addresses the relationship between place and product in a unidirectional way around country of origin effects on products; such a relationship consequently suggests that public policy aimed at influencing the perception of a region can in turn influence the symbolic qualities of physical products associated with that region. In addition we propose that there is a simultaneous transfer in the opposite direction whereby the immaterial qualities of products can influence perceptions of the home region. In this way the paper seeks to contribute a place-based bridging of the destination management literature and the brand management literature. Furthermore, the region as an entity in itself also “competes” against others for inward investment, major sporting and cultural events, tourists, and skilled knowledge workers (Anholt, 2009; Florida, 2007). Thus as Fetscherin (2010) notes, although the interest in nation/country branding emerged from the marketing literature, in recent years it has become apparent that it has a much broader cross-disciplinary relevance. To this end Dinnie (2008, p. 15) has usefully defined country brand as ‘the

unique, multi-dimensional blend of elements that provide the nation with culturally grounded differentiation and relevance for all of its target audiences.’

After providing an overview of the concept of symbolic value, and how this relates to both products and places, empirical evidence from Wales is then presented as the determining case study in order to understand the current position and its response to the challenges faced in an increasingly globalised and competitive environment – competitive in all senses, i.e. not only for products, but also for talented people, visitors, and inward investment. This is consistent with the view of Wales as a region in need of upgrading the “tangible” economy while simultaneously finding new images and symbols with which to project itself in external markets (Clifton, Gärtner, & Rehfeld, 2011). It is argued that product-branding and regional branding is a co-evolutionary process of cultural exchange between the private and the public, institutions and individuals, and a tentative agenda for further research across regions is proposed. Within this co-evolving regional product and regional image branding landscape aspects of regional culture are manipulated, reinvented and in turn fed back between the private and public sectors. At present these changes typically involve only a relatively small number of companies, albeit significant in terms of profile, who are consciously stepping away from the past, more “conservative” images, symbols and cultural references in order to become more successful. In turn these firms are themselves impacting upon and framing the cultural shift, raising the scope for the use of more self-confident, humorous, and self-deprecating symbols and manifestations of regional identity. As such, this study is placed in the context of Welsh political and economic devolution as a “process” rather than an “event”. Finally, we attempt to draw some wider conclusions for understanding these issues and for further research. For example, although potentially transformative as Pike (2009) notes, the “local” frame for considering geographically entangled brands and branding in regional development can also be conservative, insular and exclusionary, at worst encouraging forms of economic nationalism and parochial patriotism (Harvey, 1996; Hinrichs, 2003). Conversely, but no less potentially damaging, is the danger of a focus on past cultural references acting as Hobsbawm and Ranger (1983) describe as a “flywheel to innovation” through the legitimising of resistance to change. Moreover as Turok (2009) has described although many places have recently begun to pursue what might be called strategies of “distinctiveness”, upon closer examination many commonalities are seen around a fairly unsophisticated focus on nascent industries, high-level occupations, signature buildings and consumer identities. Thus he argues for a deep understanding of existing capabilities rather than off the shelf or transplanted policies when seeking to build sources of advantage that other places cannot readily reproduce. In keeping with this view, Morgan (2012) has suggested the need for “mindful” destination management if long term success is to be achieved – which encompasses productive and ethical internal coalitions between civil society, government and business, rather than chasing a band of Key Performance Indicators (KPIs) focused around narrow growth outcomes.

2. Branding, symbolic value, and place

Location-based sources of industrial advantage are well rehearsed in the economic geography literature (clusters, innovations systems, creative cities, etc.), but as Jansson and Power (2010) highlight, in addition to providing the “industrial systems” required to deliver innovative products, successful places will also offer what they term a ‘set of spaces and channels for the negotiation and communication of immaterial value’ (p. 890). This is interesting in suggesting that the attributes needed for the production of successful functional products and those required for realising their successful immaterial or symbolic aspects (or indeed brands) are thus both place-based. These authors highlight that such platforms or “brand channels” are different from the one-dimensional place-branding initiatives associated with the boosting of lagging regions/declining cities, rather they are a

more complex set of interactions that enable the transmission of what they term “concurrent place myths”. The key point here then is that this puts the interaction between product and place firmly on the policy agenda. Similarly both policy-makers and academics share a focus around the whole idea of innovation (see for example, Clifton, Pickernell, Keast, & Senior, 2010); this is justifiable, but in many cases however the biggest impact on a product's success lies in the post-production phase, through the branding and marketing strategies that are employed (Power & Hauge, 2008). Such symbolic meanings have in fact always been related to the consumption of goods and experiences as Veblen (1949) has described. These activities are driven by the need to differentiate one's product from the many others that exist in the market place with similar functionality or technical specification, doing so with reference to immaterial qualities or “symbolic” value. As such the race for innovation that has defined the post-Fordist economy has given us high quality products. Increasingly, we take this functionality of products for granted, and our consumer choices are determined by the symbolic value of the product or the company behind it. The strength of a brand thus stems from a combination of how it performs and what it stands for. Park, Jaworski, and Macinnis (1986) proposed three broad categories of brand concepts: functional (i.e. solving an externally generated consumption need), symbolic (fulfilling internally generated needs for self-enhancement) and experiential (providing sensory variety or cognitive stimulation), essentially suggesting that once defined a concept should remain constant. More recent authors such as McEnally and Chernatony (1999) have however challenged this view, given that external variables and consumer preferences may change over time – a view which is consistent with our own analysis. Specifically with regard to the functional vs. symbolic aspects of branding, Bhat and Reddy (1998) question the mutual exclusivity of these dimensions and argue that brands can be successfully positioned with both functional and symbolic qualities. This is again consistent with findings presented here which highlight the temporal evolution of branding and the interaction between the different aspects of a brand.

Successful global brands typically originate from a place that has a brand image of its own, and the product is quite often strongly linked with that image – whether it is an Italian sports car, associated with the qualities of style, speed and innovative design, French perfume with chic and classiness, or Japanese consumer electronics that associate implicitly with the merits of high-tech expertise and affordable quality. Goods produced within in any given region are imbued with an associated symbolic value – whether this is weak or strong, positive or negative (Anholt, 2003), and moreover these associations are typically activated implicitly in the mind of consumers by the mere presence of country-of-origin (COO) information (Liu & Johnson, 2005). The basic idea that a product's COO can influence consumers' judgment of it in a consistent manner is though a simplistic one, and Pharr (2005) has called for more nuanced understanding of the concept in the age of globalised supply chains, complex corporate ownership structures and the international division of labour. Thus as she describes it COO is an “evolving construct”. This evolution has incorporated the consideration of cultural values, country stereotypes, and the explicit recognition that design, assembly, manufacture and so on of a single product can increasingly occur in different places – and indeed there is evidence that COO might often be incorrectly identified by potential consumers (Rosenbloom & Haefner, 2009). In addition Thakor and Lavack (2003) highlight that the majority of COO research is focused at the level of the product rather than the brand, and in this way brand is treated as an extrinsic variable when in fact it may itself provide origin-related cues (particularly with regard to large-ticket items). From this they propose that knowledge of brand origin may be a more significant factor than is country of manufacture or assembly. This is consistent with the views of Laroche, Papadopoulos, Heslop, and Mourali (2005) who suggest that the view of country image purely as a “halo” that consumers use to infer the quality of unfamiliar foreign products is in need of further investigation, with the simultaneous processing of (flag-ship) product beliefs and country image as a fertile ground

for future research. Interestingly, Jo, Nakamoto and Nelson (2003) found that a positive brand image can serve as a “shield” for certain products against negative COO effects – so the key question for us here is – can this go a stage further and provide positive spillovers back to the COO image or brand, essentially a kind of reverse halo effect? Pharr (2005) argues that product related factors should be used as moderators of COO effects, i.e. that different products can have different relationships with their country or place of origin, but stops short of suggesting that product brands can potentially influence COO effects per se. As an example of Pharr's moderating factors, Piron's (2000) finding that COO effects were stronger for luxury or publicly consumed goods is significant in that this can be interpreted as confirming that [1] symbolic factors are more important for such goods and [2] COO is an example of such a factor.¹

Thus the “entangled geographies” of brands and branding (Pike, 2009) are reinforced by research that suggests “country image identifiers” (Papadopoulos, 1993) and product “nationalities” (Phau & Prendergast, 2000) are growing in importance because competition and standardisation in globalising markets reduces uniqueness and stimulates the demand for authenticity and provenance. Related to this there has been growing discussion regarding what some authors term the “experience economy” as a shorthand for the many intangible qualities which surround the consumption decisions (Lorentzen & Hansen, 2009). As such there is an iterative movement back and forth between how people act (both as consumers and as social citizens) and the representation of a place. This process may also take place particularly at the regional (or “small” nation) level; indeed this is closely related to concept of “terroir”. A French term without direct English translation it essentially refers to being of a defined geographical area or terrain, but also the customs and idioms inherent in that particular location; so it is about the physical environment but also the constructed and the cultural one (Barham, 2003). More generally, there is growing realisation that this does not apply solely to physical products; different nations (and the sub-regions thereof) possess their own set of “intangible” assets or specializations – places and destinations are in many ways also directly in competition with each other – for highly skilled labour, for inward investment projects, and also for tourists and visitors. There are then spatial outcomes in all this as suggested above. Typically, place-marketing, city-branding and the like have essentially been described and understood from a predominantly marketing perspective (Hospers, 2009). However as Voase (2012) has shown the branding process is more straightforward when relatively simple products are involved (he employs the examples of chocolate bars or fizzy drinks) – ones which represent a blank canvas onto which a “personality” can be drawn.² Conversely destinations by their nature are complex entities which are likely to have some pre-existing resonance with potential consumers. There is also a body of work going back to Lynch (1960) through Urry (1990) which stresses the role that the built environment in combination with more socially-constructed factors plays in forming pervasive images. More recently work by Florida (2002), Jansson and Power (2006), and Fetscherin (2010) suggests that places which have strong and dynamic brands are more successful in attracting businesses and talent within the knowledge economy, in addition to improved performance in export markets and in tourism. Van Ham (2001, p. 2) has gone as far as making the assertion that ‘... brands and states often merge in the minds of the global consumer’ and that ‘...in this crowded arena, states that lack

Relevant brand equity will not survive’ (2001, p. 6). This then suggests a clear role of and mechanism for state-level policy in all this as brands and places can intertwine to become the focus of successful collective regional institutional action (Morgan, Marsden, & Murdoch, 2006; Pike, 2009). As noted above as globalisation increases, pressures driving homogenisation and deregulation have grown. More specifically, much of the focus of competition policy within the European Union over the previous four decades has been around the creation and expansion of a single market for goods and

services within the member states. Indeed, the fundamental aim of the EC Treaty itself was to remove all unnecessary barriers to trade and to create a “common market” within the community. There is however potentially a fundamental paradox in that the removal of such “artificial” transaction costs both increases the efficient working of the market but may simultaneously erode sources of distinctiveness which are of value to local producers. This issue has to date been addressed most extensively by the EC in the field of agriculture. Increases in efficiency meant that by the 1980s farm production had created a glut in supply for many basic products; a key shift in policy was thus the move from quantity to quality proposed by the Commission in late 1980s. One means of doing this was by protecting the geographical origin of agri-food products; geographical indication (GI) protection was seen as a means of encouraging producers to diversify and to concentrate on quality. Less directly, the intention was that this would also help in the promotion of these products – the key point here being that unlike GI, trademarks essentially convert the attributes of a place into a property which is tradable and thus potentially vulnerable to de-localisation (Morgan et al., 2006). The case has been made therefore that GIs are a real embodiment of “glocalisation” i.e. products participating in global markets and at the same time supportive of local culture and economies (Giovannucci, Josling, Kerr, O’Connor, & Yeung, 2009).³ This is perhaps overstating the significance somewhat; although a detailed examination of the role that GIs play in linking local culture and the market is beyond the scope of this paper, they do represent an explicit manifestation of symbolic value and product differentiation associated with place – indeed in her comprehensive review of COO research Pharr (2005) terms such protected origin status markers as “meta-brands”.

Returning to the destination branding theme directly and the need for more nuanced understandings thereof, Voase (2012) highlights the subtle – yet significant – change in the strap line from Morgan, Pritchard, and Pride (2004) *Destination Branding: creating the unique destination proposition* to the later (2011) iteration of *Destination Brands: Managing Place Reputation*, which suggests that destination branding is more about what can be thought of as “curating” the various qualities inherent in a place rather than an instrumental exercise or linear policy intervention. This is borne out directly by Morgan (2012) himself in suggesting that the role of Destination Management Organisations (DMOs) is actually quite limited within the wider place-based development agenda, and they are more realistically “destination stewards” rather than agencies which can really “manage” either brands or destinations. This is a theme to which we return later.

3. Wales: brands and branding

The case of Wales is an interesting one as it represents a place with, on the one hand a distinct identity and history, but on the other as a small nation within the UK which has experienced a difficult transition to a post-industrial or knowledge-based economy (Cooke & Clifton, 2005). Moreover, in addition to the economic shift Wales has undergone political changes in the last decade with the introduction of devolved governance.

Howell and Barber (1990) have listed a range of attitudes (in addition to the Welsh language) which distinguish the Welsh, including: ‘Their separate history, instinctive radicalism in religion and politics, contempt for social pretentiousness, personal warmth and exuberance, sociability, and love of music’. Defining Welsh identity is, however, very difficult (Bowie, 1993), indeed ‘...this is the first point to grasp about the history of this people – a country called Wales exists only because the Welsh invented it. The Welsh exist only because they invented themselves’ (Williams, 1985, p. 2). Some historians and sociologists have suggested that for many Welsh people these historical and political processes have culminated in the notion that the Welsh are ‘second class citizens... [and] that status creates a very real feeling of inferiority’ (Thomas, 1992, p. 10). Thus, Davies (1987, p. 60) has

described Wales as a classic example of an ‘internal colony’, for which the union with England marked the beginning of a sustained campaign of cultural homogenisation by the central state ‘... Welsh was banned for administrative and legal purposes, children were punished for speaking Welsh in schools.’

The National Assembly for Wales was set up in 1999 (as a consequence of the Government of Wales Act 1998) and possesses the power to determine how the central government budget for Wales is spent and administered (although the UK parliament reserves the right to set limits on the powers of the Welsh Assembly). The Welsh Language Act 1993 and the Government of Wales Act 1998 provide that the Welsh and English languages be treated on a basis of equality. English is spoken by almost all people in Wales and is therefore the de facto main language. However, northern and western Wales retain many areas where Welsh is spoken as a first language by the majority of the population and English is learnt as a second language; 21.7% of the Welsh population is able to speak or read Welsh to some degree (based on the 2001 census). As such, at the start of the 2000s there were a number of external and internal factors combining to facilitate a re-identification of Wales as a distinctively Welsh entity and space; factors which were the product of counter or alternative political and cultural discourses. Perhaps the most obvious of these were the moves towards political devolution and the rise of the European Union (Pritchard & Morgan, 2001).

With respect to Wales itself in relation to some of these issues, the country has in recent years seen a clearly increasing sense of distinct identity⁴ but simultaneously lacks strong commercial brands (unlike certain other small nations – Scotch Whisky, Nokia, Guinness, Royal Bank of Scotland and the like ... ask people to name a Welsh product and many would struggle to do so). The Irish for example have also managed to establish over recent years a successful new spirit-based drink – Baileys – and a new brand of cider, Magners, both of which help to project an image of Ireland around the world, as do the many Irish bars to be found in cities on all five Continents. Major Irish food brands are also familiar in Britain and elsewhere. Moreover, as David (2007b) notes, Ryanair may not be the world’s favourite airline but it projects an image of a successful country with business operators able to compete in the toughest markets.⁵

This lack of brand awareness on the national and international consumer landscape, and indeed lack of what can be thought of as core products, is a problem in that it hampers Wales’ ability to control its own economic destiny, regardless of whatever political arrangements are in place. Much of Welsh production activity is concentrated in the areas of Intermediate (or international) products, which is in turn largely a legacy of past industrial structure – the heavy industrial past meant relatively few consumer-facing products. Although the majority of these industries have now gone, this single sector and large firm dominance and the weight of its influence on occupational and skill structures has typically left behind a weak local tradition of entrepreneurship and small independent enterprise.⁶ Moreover, the replacement employment during the 1970s through to the 1990s was often provided by manufacturing FDI operations, which although providing valuable jobs tended to lack the higher managerial functions such as finance, R&D, marketing and the like. Some more recent FDI industries located within Wales are different – e.g. consumer electronics – but even then the brand is largely associated with the origin of the Multi National Enterprise that produces it, rather than the region the actual production or assembly occurs in.

Therefore, although there are a number of signs of a strengthening national identity, which have perhaps gone some way towards creating a new Welsh image and several new Welsh brands, authors such as David (2007a, 2007b) suggest that there is something missing that stunts this ongoing effort – the weak Welsh presence in modern commercial fields, and particularly those closest to the consumer. Too much of Wales’s image is based on (usually subsidised) artistic, cultural and heritage icons

and/or its industrial and sporting past. In a world where the brand you create for yourself is all-important, Wales has only “half a brand”. The brand image of Wales has thus been characterised as ‘come and visit us and see what we used to do, or come and see what a show we can put on’ (David, 2007b). If pressed to name “some- thing Welsh” responses might refer to miners, mail-voice choirs, Tom Jones or Rugby. More “modern” examples might include Duffy, Manic Street Preachers, Stereophonics, Super Fury Animals and the like – but essentially the same principle is at work. This raises issues for both firms and policy-makers alike, i.e. for firms that have in the past been unwilling or unable to use regional association in their branding strategies, and for the policy-makers who are charged with addressing and improving this situation. However, as described in preceding sections – and despite concerns over the capacity to do so (see for example, Cooke & Clifton, 2005) – there now exists at least some kind of scope for policy divergence in Wales, from the past and from the rest of the UK, which offers the potential to begin to tackle this issue.

As Pritchard and Morgan (2001) note, imagery is one of the most researched aspects of tourism marketing, and many authors, including Gunn (1988), Chon (1990), Gartner (1993) and Gold and Ward (1994), have discussed image-related issues in destination and tourism product marketing (Selby & Morgan, 1996). Much more limited attention has focused on how the marketing of destinations can reflect socio-political, economic and cultural change.⁷ Tourism is extremely important to the Welsh economy, contributing d3 billion directly to GDP, and employing over eight per cent of the workforce (VisitBritain, 2013).

Table 1

Case Study Companies

Company	Year	Size of founding	Market (employment) sector	Primary geographic markets	Key	Drivers& response
SA Brain	1882	2,300	Brewing& Hospitality	Wales & West /Midlands of England		Brand re-orientation in response to a declining market (i.e. traditional beer & associated pubs). Active pursuing of ‘National Brand’ status
Prince’s Gate	1992	30	Mineral Water	UK – but with focus towards location in South Wales		Re-branding in order to a growing target market segment (younger consumers, women). Deliberate use of more ‘quirky/imagery and shift away from more conservative Welsh imagery.
Penderyn	1998	25	Distilling (whisky)	Wales, the rest of UK as a riche. International (USA, Japan)		Company set up to produce a new product-whisky from Wales. As a quality riche product the imagery Needed to be authentic, but not clichéd.

Wales has a range of assets which underpin its tourism appeal and its diverse natural environment (particularly its coastline and mountains) is the main factor in attracting the UK and European visitors. Wales’ other principal tourism asset is that it is a distinctive country with its own language, culture and heritage. Pritchard and Morgan (2001) provide evidence of Wales being separately and simultaneously branded in the UK and in its key overseas markets; the promotion of Wales’ language and culture used by the WTB as a marketing advantage overseas where visitors were seeking a new, culturally diverse experience. Conversely in the UK, it is the natural environment which forms the basis of Wales’ marketing appeals. This was demonstrated by

analysing WTB promotional literature and brochures aimed at the USA in comparison to those produced for the UK market. Content analysis of the former revealed that such branding symbols as Celtic heritage, the Welsh language, myths and legends, and Welsh emblems accounted for almost a third of all the images in the brochure. Moreover, a Celtic-style typeface dominates whilst images of the Welsh flag and the Welsh language are central to each brochure page layout. In contrast, unlike the overseas brochure, that for the UK tended to be magazine-style collections of articles by celebrities with connections to Wales (such as actor Sir Anthony Hopkins, broadcaster John Humphrys and botanist David Bellamy). Pritchard and Morgan (2001) argue that a combination of cultural and political processes have facilitated this promotion of a more overtly Welsh tourism brand image in international markets. By contrast, however, they suggest that such remains the power of certain negative discourses that a marketing strategy which promotes a distinctively Welsh brand image in the UK is still (or at least was in the early 2000s) considered problematic by public sector marketers in Wales. These authors do however allude to the first signs of marketing involving media imagery that is noticeably of a younger generation, along with a greater pride shown towards Welsh itself as a living language, rather than some kind of cultural curiosity. This is a point we return to below.

Interestingly, moving outside of the tourism sector into the field of international business, other authors have drawn analogous conclusions with respect to inward investment; although generally over performing in the attraction of investment from outside the UK, the Welsh economy has tended to underperform relative to other economic regions of the United Kingdom in attracting British investment (Smith, 1998). This author suggests that Wales does indeed have an image problem in this area too, in that there is a negative perception among those outside the region with little experience of the area, and that this is compounded by perceptions of Welshness – of the people, language and culture (Smith, 1998, p. 4).

4. Product branding and place branding – case study examples from Wales

4.1. Research approach

In this section we present examples of branding developed recently by three companies in Wales – SA Brain, Prince's Gate, and Penderyn Whisky.⁸ This is intended to be a purposive sample designed to illustrate the issues we raise within this paper – i.e. the development of successful products imbued with symbolic value, derived from a more modern interpretation of regional symbols and the culture thereof. The method is thus a “critical incident” approach, designed to understand the key drivers and processes involved. After collecting secondary data on the firms, in depth interviews were conducted with a key informant (either Marketing Director or CEO), in order to not only ask factual questions but to systematically record and document responses and to probe for deeper meaning and understanding.

Having discussed examples of specific products in which a cultural exchange takes place between the company or product and the region itself, there follows a review of the activities of the Welsh Government (WG) in relation to its own recent branding (and re-branding) activities. This is informed by a discussion of some of the imagery employed by WG during this time in combination with interview material from the then key policy-maker within WG – i.e. the individual with most influence over the nation brand. The focus here is to examine the key contribution of this paper – the extent to which positive spillovers can accrue back to the COO image or brand from indigenous products.

4.2. *The case study firms – overview and discussion*

Table 1 highlights key characteristics of the case study companies in terms of size, age, products and markets; it also summarises key drivers of change in the companies' branding strategies and their response to these. Founded in 1882, SA Brain

& Co. Ltd. is a large family owned company with over pubs in South East, South West and Mid Wales. The brands are also growing in distribution in North Wales among national retail chains and local wholesalers. Conversely, Prince's Gate was founded in 1992 by two brothers who remain as directors, with the company remaining under private ownership. Prince's Gate employs around 30 people, producing between 30 and 35 million bottles of mineral water per annum. Despite their differences, both companies have faced similar challenges. In 2001, research conducted among Brains' customers and employees indicated the need to shift consumer and trade perceptions of Brain's away from its traditional, conservative reputation into a more dynamic, contemporary and innovative brand. To this end, a strategic "energisation" of the company was initiated, concentrating on the "cornerstones" of the Brains' brand; pubs, drinks distribution and people, with the ultimate aim of becoming a "national" Welsh brand – in the early 2000s the company began to realise that it was too embedded in Cardiff (the capital city) which was limiting our ability to represent Wales as a whole. One of the key factors in this strategy was the sponsorship of the Welsh national rugby team, as was the simple act of turning the dragon in the logo around 1801, so that it now faces forwards rather than backwards (and thus symbolically into the future rather than referring back to the past) – consistent with the "positive thinking" advertising strap line.



Fig. 1. Previous logo used by Prince's Gate.

Similarly for Prince's Gate, the product was previously associated with a quite conservative (possibly even dull, or non-descript) brand image (see Fig. 1). As a direct response to this issue, which was becoming a limiting factor in market expansion and product differentiation, the board made a conscious decision (during the early 2000s) to attempt to change this perception. The thought process within the company was to appeal to a target market which was female biased and between the ages of 25 and

34. Similarly to that of SA Brain, Prince's Gate's own market research on this particular market segment quite clearly identifying a dislike for stereotypical emblems of Welshness, with the comment that these do not do what is a "savvy culture" any justice. In short the imagery was regarded as quite dated, and indeed somewhat patronising to these potential consumers. The respondent at Prince's Gate speculated on nature of the customer, and their (in some ways surprisingly subtle) perception of regional imagery with the comment that 'I think what has changed is that brands are becoming braver. The communication of regionality was formerly done quite overtly, just "Wales" and it was really basic...but it didn't give the consumer the justice of their being able to read deeper into other symbols.'

Fig. 2 shows an example of the imagery now used by Prince's

Gate, which in comparison to what they were using before can be characterised as being much more knowing, humorous, quirky, and indeed confident. The "earthiness" of the branding was intentional – to reflect the fact that Prince's Gate is a small company and not a "blue chip" multinational – i.e. it is consciously "authentic". This approach is even extended to consideration of the type font now used which was actually derived from a potato print carving, which is unique to the author's knowledge. As the company commented this was meant to suggest that we were

literally printing out labels on so on ourselves by hand in rural Wales; a “brave move” in the words of the company respondent. Returning to SA Brain, their mission statement is “to become the leading independent, integrated drinks and hospitality company in Wales, recognised by consumers throughout the UK”⁹ – acknowledging the dual Wales and the UK focus. It is also significant that the company has explicitly considered the internal (company) and external (product, market) consistency that is required in achieving an “authentic” brand. In this way the brand works as a marketing tool but is also rooted in the organisational culture itself, which in turn reinforces. Due to the national brand status the company now sells into parts of Wales – predominantly the north – that they previously were not able to. As the company respondent described the situation– ‘the logistics used to drive the marketing and branding; now the brand drives the logistics’. The graphic illustration of “positive thinking” was a pint glass shown with the top half filled, as in Fig. 3. This simple device became the lasting expression of positive thinking, supported by Brain’s market research within Wales which asked interviewees how they would describe the picture (without a caption). Similarly 79% of respondents identified the glass as “half full”, suggesting this idea both struck a chord with the Welsh psyche and moreover could be owned (in the branding sense) by the company. The “always half full” graphic has continued in usage as the end frame to TV advertisements and retail point of sale items while “positive thinking” continues as the theme of outdoor and TV advertising.

Superficially similar to SA Brain in terms of product area, Penderyn is however a much younger company (formed in 1998), and much smaller, with 25 employees. SA Brain actually holds a minority stake in the company, taken in lieu of cash payment for supplying barley mash – the raw ingredient of whisky. A prior Welsh distilling industry died out in the late 19th century, meaning that in one sense whisky from Wales is not a totally new phenomena; a company call Welsh Distillers existed in the 1970s, but essentially they were just producing re-badged Scotch. The Scottish Whisky Association took legal action and the company ceased trading the 1980s. In contrast the key aspect of Penderyn is that they have their own unique still – this uses modern technology derived from the petro-chemical industry, meaning much greater distilling efficiency and thus requiring only single distillation, rather than the double or triple process used in Scotland and elsewhere.¹⁰

As such Penderyn produces a niche product which has to appeal within Wales, but also to the important export market. This means that in the words of the company itself the product has to be “authentic, but not too Welsh”. It was vital for Penderyn, particularly in the light of history as above, that they differentiated themselves from Scotch whisky – as the company respondent noted “the best Scotch produced in Wales” was unlikely to be a successful strap line in the market place. To this end, the decision was taken at an early stage of the company not to use the imagery of Welsh clichés – whether these be daffodils, traditional black hats seen in folk dress, and so on. This is interesting in that there are clear parallels to be seen with the approaches of SA Brain and Prince’s Gate – the difference for Penderyn being that they were making these decisions at the creation stage of a new product, rather than as a re-branding exercise for an existing one. The styling of the bottle was also key in this brand proposition – a leading designer within the industry was given the brief to produce something that was Welsh, but modern in look and feel (see Fig. 4).¹¹ The key point for Penderyn was to employ tones of Welshness and authenticity in producing and marketing a quality product which ultimately appealed to consumers for its intrinsic quality rather than as a kind of novelty sold purely on crass representations of Welshness alone.

There was also a debate around the actual naming the product, with one key stakeholder keen to use “Beacon” (a reference to the Brecon Beacons National Park) as a more accessible name, particularly for the US market, but ultimately it was felt important to use Penderyn (the village in which the distillery is based) in order to be identifiably Welsh and associated with an authentic place of origin. This location also has the advantage of providing access to pure ground water from the National Park, and the associated symbolic qualities this provides, in combination with qualification for European Funding convergence funding – which were important in both the company’s initial start up and subsequently in part-funding a new visitor centre at the distillery.



We're pretty easy to please down here at Prince's Gate. We love nothing more than a bad weather forecast, a grey sky full of clouds, and the odd torrential downpour.

That's because every drop of rain that falls on the Pembrokeshire Hills around us replenishes the Prince's Gate Spring.

We wait patiently for fifteen years while it filters through the mineral rich landscape, where it picks up a host of mineral goodness along the way. Then all we do is lovingly bottle it for you to enjoy.

Track one down immediately. Open it. Drink it. Smile.

Then the next time it rains, join us by jumping up and down and letting out a little whoop of joy!

Rain is great. We love it.

Fig. 2. An example of imagery now used by Prince's Gate.



Fig. 3. "Always half full".



Fig. 4. Penderyn – "discovering the pioneer spirit".

We see then evidence from three diverse yet related companies in Wales which have begun to employ aspects of Welsh imagery in more subtle and nuanced ways to either new products or the re-branding of existing ones. These firms have all in recent years begun to grapple with the changing meaning of the country of origin – Wales – for their products, and have developed distinct yet clearly related strategies to in order to deal with this. An important point here is that this identity and rooting in tradition conversely does not imply earnestness or pomposity, or inherent conservatism. As such all three brands seem to be reaching out to their origins or local authenticity in new ways. Consumers are typically playing a key role in shaping these strategies – Prince's Gate for example highlight the fact that it is actually intermediaries (i.e. retailers) who were more resistant to their updated imagery. The key message here is that a genuine sense of identity actually thrives on a diversity of approaches and

symbols – the “multi-dimensional blend” of Dinnie (2008) – and thus going beyond the established canon can actually reinforce this effect.

4.3. *Branding of region – new approaches?*

In the section above we have outlined three examples of consumer products in relation to their use of Welshness in their branding. We now discuss the image of the region (nation) itself. As described earlier, there were (and to an extent still are) clear problems for policy makers to address within Wales – i.e. a poor brand image, an unwillingness to associate with this for commercial products, and also issues around tourist attraction, particularly in terms of a downmarket perception in certain quarters. In the past the Welsh Development Agency (the body charged with development in Wales until its absorption into the Welsh Assembly Government in 2006, along with other Quangos including the Wales Tourist Board) tended to be more focused on generating “sales leads” for inward investment than building the reputation of Wales in any coherent way. The job of connecting the “business climate” and the “people climate” offers is now the brief for the marketing department of the WG. Although much criticised in many quarters for restricting their freedom of operation, it is possible to argue that the bringing of the activities of the WDA and WTB in-house to the Welsh Assembly Government has actually facilitated this more joined up approach.¹² Essentially, the role of the department can be summarised (quoting the interview respondent) as understanding and implementing how ‘positive elements of national reputation or regional reputation can be taken and used to add value to the Welsh commercial proposition, in terms of how it is conveyed to customers what the business, or more regularly what the product, is all about’. The context for this activity is the acceptance that the skills, infrastructure and so on are fundamentals that all regions have to be able to provide – as such they are “hygiene” factors, rather than differentiating factors. As the WG is aware, the differentiating factors are more increasingly associated with images of place, and as such there is a willingness to build this more overtly into marketing communication.

There are however potential dangers within this strategy, in that if not done with due consideration for what is authentic and ultimately believable, a compromised or inconsistent message might reach both sets of the target audience (i.e. business climate and people climate) – essentially the error of attempting to be all things to all people. Statements associated with these resulting bland or generic marketing initiatives have been summarised by the marketing division of WG itself as the “evil clichés” of place branding, and would include such phrases as “best kept secret”, “land of contrasts”, “truly world class”, “a genuine success story” and the like. The WG respondent noted that many of the other (now disbanded) Regional Development Agencies (RDAs) in the UK have employed such methods, leading to rather unfocussed approaches which suggest excellence in all areas, rather than seeking to understand what it is that clients actually want.

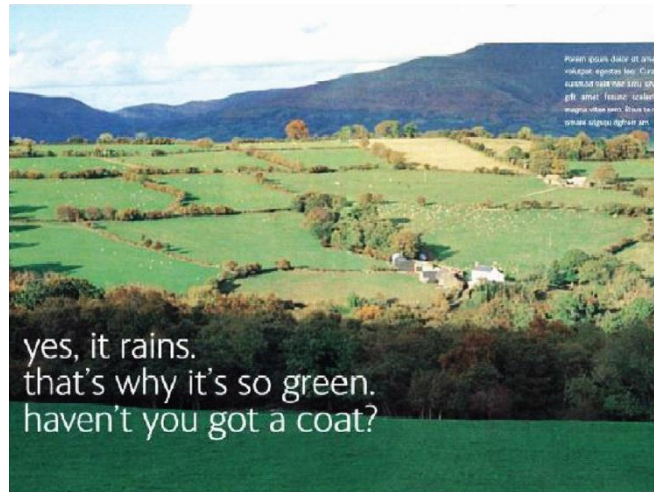


Fig. 5. "Yes, it rains".

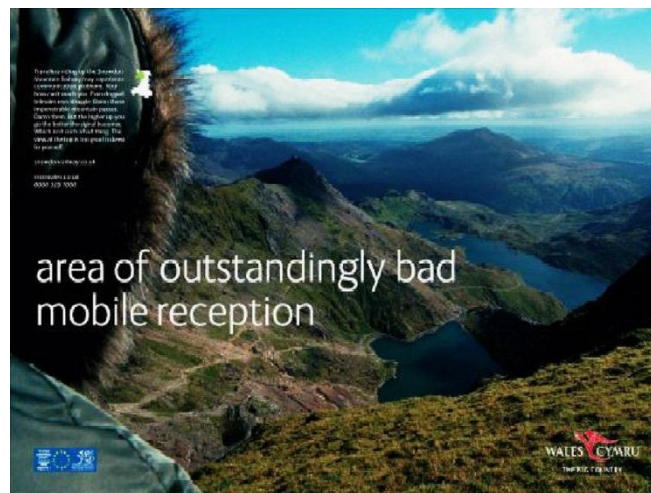


Fig. 6. "Area of outstandingly bad mobile reception".

This is something that WG has sought to build into its external communication, with branding techniques now centred more around creating focus and offering business solutions rather than claiming to be “good at everything”. To this end, idea that the WG developed in order to tackle these issues is that of Wales as a “Challenger” brand. As a challenger the key requirement is to stand out, to do something that differentiates the offer from whatever is perceived as the lead brand in the relevant field. Echoing the three product brands above, this means focusing on reputation, but in a more subtle ways (i.e. avoiding clichés) than have been employed in the past, and using a common starting point to underpin promotional activity and imagery in all sectors that require establishing a presence. This though has to be grounded in reality, to be authentic in making use of common cultural traits; for Wales this could be via self-deprecating humour, irreverence, lack of respect for authority and the establishment – WG sought here to use this strategy to get businesses to innovate and to be distinctive. We seek to illustrate this point further by presenting two examples of brand-building imagery from Wales (Figs. 5 and 6); these are from tourism campaigns, which as noted by WG tend to be more prevalent simply because they involve more “broadcast” marketing techniques – i.e. more visible in the media. The tone is very similar in style to promotional material developed for economic development or inward investment purposes – space constraints however prevent the presentation thereof.¹³

The WG respondent noted the very strong “tone of voice” and strong visual theme in their communications – and expressed the desire the Welsh businesses would begin to reflect this wherever they could. The explicit approach here is one that is intended to facilitate the self-reinforcing use of positive images of Wales across both public and private, tourism and business sectors. Thus the aspiration is that more the reputation of Wales is improved the more businesses will want to use their provenance with Wales as part of their core offer; i.e. it becomes a virtuous circle. Consistent with the

case studies presented above, the WG respondent claims that ‘there is definitely more evidence of businesses positively using their Welshness as a way of adding value to their product offers’. He goes on to voice the opinion that this is successful due to the consistency between the message that is being communicated and the “truth about Wales” – i.e. that it is genuine and grounded authentically in the culture of the place. The observation here is also that many of these businesses are “in very similar territory” to WG in terms of developing their propositions by building brands rather than just selling products, with aspects of Welshness built into those brands. This is something we have also observed directly in our own case studies companies. Whereas in the past even if there were positive Welsh elements within a product offering, companies may have been reluctant to use them due to the wider negativity associated with the COO effect of Wales – counter to the shield effect suggested by Jo, Nakamoto, and Nelson (2003). In this way it can be observed that there are two areas of change: [1] more businesses understanding the importance of branding to build and add value to their product offers, and [2] those in certain sectors finding new ways of differentiation through their links with place – returning to the hypothesis on COO effects and symbolic value outlined earlier.

5. Conclusions, implications and further research: branding of the region, branding from the region?

Using the example of Wales, interaction between place and product would appear to be now firmly on the (regional) policy making agenda – a manifestation of the call by Dinnie (2008) and Jansson and Power (2010) for a “multi-dimensional blend of elements” in order to achieve culturally-grounded differentiation. This is in turn contributing to the development of COO and its effects as an evolving construct, after Pharr (2005). Moreover these COO effects have been shown to play an important role in influencing symbolic value of products – particularly for brands of the type investigated in this paper. We can interpret this observation as a clear demonstration of COO effects moderated by product related factors, again as per Pharr’s (2005) analysis.

Specifically, it is proposed that the most significant aspect of the changing branding landscape we describe in the sections above is this – the co-evolution of branding and the use of regional imagery for the promotion of Welsh products with new approaches to shaping Wales as a brand. As such, there appears to have been a gradual co-evolution of product branding (private sector) and regional image branding (public sector) in Wales. Moreover policy-makers now explicitly reference the branding and promotional strategies of these products as exemplars of good practice, and of where they want to go with regional branding (indeed – one of the key people behind SA Brain’s re-branding was commissioned by WG to work on their strategies as a direct result of this). In turn, other Welsh firms are now becoming more self-confident and less conservative in the imagery and regional cultural references they use to brand and promote their own products. This is significant in that it suggests confirmation of positive spillovers back to the COO effect from the image or branding a region’s physical products – the “reverse halo effect” postulated earlier on in this paper.

Thus we see spillovers between private and public sectors, physical products, tourism and inward investment initiatives. This is taking place within both the wider context of devolution and the political restructuring of Wales, and more generally the emergence of more sophisticated consumer behaviour, and the increasing role of provenance, post-production innovation and thus of symbolic value. At present the changes described above only involve a relatively small number of companies, but significant in terms of profile, who are consciously stepping away from the past, more “conservative” images, symbolism and cultural references to become more successful – and in turn these firms are themselves impacting upon and framing the cultural shift, raising the scope for the use of more self-confident, humorous, and self-deprecating symbols and manifestations of regional identity.

That said, we should be aware that there are of course limitations and complexities in the research. The product case studies are from the drinks and alcoholic beverage sectors – ones which lend themselves more easily to the shifts described above than do others. As a counter example, the

wings of Airbus aircraft are manufactured at Broughton in North Wales; it is hard to conceive of such products being successfully associated with an image of irreverence or quirkiness. There are also caveats at the institutional level, with evidence emerging that the potential opportunity provided by government agency reform to fully develop a coherent and coordinated place-branding offer for tourism, inward investment and mobile high-skilled labour is proving something of a missed opportunity (Crawley, Munday, & Delbridge, 2012). Regardless of whether we accept this or not, having the Welsh Government itself as the main informant for the nation brand raises additional questions – how much in control of the brand does WG actually have in this increasingly multi-dimensional landscape, and what kind of timeframe is realistically required for real changes to play out? Potential tensions also exist with regard to city as destination versus nation as destination and what this means in terms of the not always compatible policy goals of achieving balanced development on one hand while on the other playing to existing strengths and capabilities (Clifton, O’Sullivan, & Pickernell, 2012). This is a potentially interesting area for further research in that Rosenbloom and Haefner (2009) have proposed that rather than being dichotomous between the macro (global – ubiquitous, homogenous) and the microlevels (local, adaptive) there is now what they term a “meso level” emerging in which regionalisation becomes an important brand characteristic.

Fundamentally, brands have become a key component in economic success for the region, and the relative lack of businesses and products in international markets that can readily be identified as another effect. As David (2007a, 2007b) notes, being the country that owns (in various senses of the word – i.e. not purely financial) products such as Guinness, Scotch Whisky, the Maersk shipping line (Denmark), or Nokia (Finland) can feed the self-esteem of the inhabitants of these basically small countries, even if only subconsciously, leaving them with the underlying feeling that they belong to a nation which has something to offer the world that is better than others’ product in the same field. This can help convey an image of a country where businesses and individuals succeed, which in itself can play a role in persuading other businesses to invest there.¹⁴ More generally therefore, this paper has sought to explore how regions can establish and maintain their distinctiveness in an ever more globalised and standardised world, in the context of the increasing importance of intangible differentiators. The intrinsic role of place itself within this process was considered, as was the potential role of European competition policy as a driving factor, albeit not always intentionally so given the wider *raison d’être* of the European Single Market. So for a number of individual firms there are essentially two parallel processes in operation as more businesses understand the importance of branding to build and add value to their product offers, and those in certain sectors are find ways of differentiating themselves through their links with place. As noted above, once the role of place or territory is introduced into the discussion then there must be to a greater extent an implied role for government policy due to the “geographically entangled” nature of branding and the region. We have then to ask ourselves what is the role of the national or regional agencies against the backdrop of the present economic crisis, which is exacerbating regional disparities in Europe. The cohesion policies of the EU have been aimed at creating balanced regional development and to reduce welfare and economic disparities; policy measures in the past attempted to steer investment and persuade companies to settle in structurally weak regions in order to tackle inequalities. If the shaping of regions is today based on the endogenous potential of innovative companies, civic societies and effective brand management, then we have to be aware of the fact that not only material or monetary capital but also social and cultural capital (Bourdieu, 1986) will not be equally distributed among European regions. Consequently, this of course will extend regional inequalities in the long run. The question, ultimately, has to be how much interregional distinctiveness a socially coherent Europe can cope with.

This is of course not a guaranteed formula for achieving long term success; the work of Hobsbawm and Ranger (1983) offering a note of caution on the potential dangers of relying on “invented traditions” as a source of cultural reference. Given their current levels of success and their relative

endowments of both physical products, brands, and regional image, different regions or nations may face common challenges but employ either by design or otherwise differing responses to these challenges. This is a potentially fruitful area for further research; for example Thorbjørnsen (2005) has noted the potential paradox that “brand extension” raises in that on the one hand it is logical to seek the highest value possible from present brand strengths, but conversely in moving into areas too far away from one’s core the risk is run of diluting those same key strengths. Maybe region/nation brands – and those charged with their stewardship – face similar dilemmas? and more to the point require better evidence to aid their successful negotiations thereof. As we have seen above, symbolic and intangible factors are becoming more important for successful regional images or brands. At the same time, it is increasingly apparent that the bodies charged with setting the agenda in this area can at best play a only a guiding or influencing role rather than an instrumental one, with civic society and “more bottom” up movements – which we can also think of as regional culture (Clifton et al., 2011) – taking centre stage. We should however keep in mind the observation of Hall (1993, p. 354) who suggests that ‘paradoxically, globalisation seems also to have led to a strengthening of “local” allegiances and identities within nation- states’. He goes on though suggest that this may be deceptive, since the strengthening of “the local” is probably less the revival of the stable identities of the past, and more to do with ‘that tricky version of “the local” which operates within, and has been thoroughly reshaped by “the global”’. This is interesting given that we have observed in this paper the reassertion of regional culture in a number of contexts – therefore perhaps another goal of new research should be to delve deeper into the implications of this “new local” culture, and what this might mean (for example) in terms of facilitating the balance between embeddedness on the one hand and engagement with external (global) markets on the other.

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