

Chapter 4

APPROACHES TO DESTINATION BRANDING AND POSITIONING IN VARIOUS COUNTRIES

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CHAPTER 4

APPROACHES TO DESTINATION BRANDING AND POSITIONING IN VARIOUS COUNTRIES

4.1 INTRODUCTION

While taking cognisance of the complexity of destination branding, the aim of this chapter is to examine and evaluate trends and best practices in various countries regarding branding and positioning of destinations.

The objectives of this chapter are to:

- Examine the role of the media in marketing a destination during a crisis;
- discuss the methods used by destinations in diversifying their markets during a crisis and how these strategies are used to counteract bad publicity;
- demonstrate the importance of a slogan and its role in repositioning a destination;
- analyse the strategies used by destination marketers in repositioning a destination;
- discuss the significant role of a public-diplomacy campaign and its impact in respect of influencing perceptions about a destination; and
- learn some lessons from various countries that have applied branding and positioning strategies in order to mitigate the impact of a crisis.

4.2 APPROACHES TO DESTINATION BRANDING IN SEVERAL SELECTED COUNTRIES

Marketers of tourism destinations in various countries have used a variety of approaches to shape public perceptions of their destinations, especially under challenging circumstances. They have among other things packaged their destinations in a series of seductive images. These images are intended to create an association with the destination by asserting its identity and brand vision in order to position the brand in the global tourism market. Chapter 4 reviews the strategies adopted by Denmark, the United States of America, Israel, Sri Lanka, Nigeria and Fiji to garner domestic and international support and shape tourism experiences during and after the crisis.

4.2.1 Denmark



When the Denmark Tourism Board launched a new brand in 2000, called “Denmark. Enjoy,” the brand was intended to modify the general perception of Denmark (Ooi, 2003). The objective of the campaign was to rid Denmark of its traditional association with romantic images, sex and drugs. The new brand set out to present an attractive and coherent image of Denmark. In order to communicate its new image, three brand values were used: unpretentious design, talent and oasis free. The new image was aimed at telling a story about Denmark and its people. A visual logo was

introduced, namely a Danish flag superimposed upon a heart and the words “Denmark. Enjoy” were used as a strap-line.

The brand and its values were crafted and chosen after lengthy and intensive discussions with various stakeholders; local tourism authorities; and the managers of tourism businesses and attractions (Ooi, 2003:5). The promotion of tourism in Denmark is decentralised and each of the role players in the tourism industry functions relatively independently as they are supported by different agencies.

Despite the existence of various regional boards, all the stakeholders were consulted in the course of the search for a new brand for Denmark. The Destination Tourism Board (DTB) also invited travel reviewers to visit and write about Denmark as a destination. The website that was created was not only used by tourists, but also by the press, conference planners and professional travel agencies. The DTB sought the help of independent travel writers for credibility. The brochures produced by the DTB reflected the key features of honesty and credibility in their candid descriptions of Denmark (Ooi, 2003).

The goal of the campaign was to create a specific atmosphere and scenery with which tourists could identify. The politics involved in the branding of a country involves the processes of seeking consensus as well as persuading various parties to use the brand and to present their destinations in the branded manner.

However, there are significant differences between the branding of a country and the branding of a product. In order to appeal to new markets and to satisfy a variety of customer preferences, Denmark improved the quality of its product and services and

offered complimentary products and leisure activities. It embarked on the presentation of workshops, launched advertisement campaigns, increased press collaboration and offered seminars (Ooi, 2003). The advertisement campaigns included the targeting of new markets with new products. The destination also directed itself at the corporate sector and introduced promotional marketing instruments that are based on information communication technologies. These promotional instruments included the introduction of online promotion and marketing; online advertisements; optimisation of search engines; and the conclusion of agreements with travel sites in source markets.

4.2.1.1 Issues that emerged from the case study of Denmark

The branding of Denmark was supported by strong funding and sound co-ordination. It focused on portraying the country as having a creative nation and it employed public diplomacy strategies to promote the perception of Denmark as a premier destination. Denmark also instituted and intensified its international public-relations initiatives, which emphasised that the country is also a study destination. The country was furthermore portrayed as being modernised and an investment location. Some of the other issues that emerged from the case study are summarised below.

Figure: 4.1 Development of a destination brand in Denmark

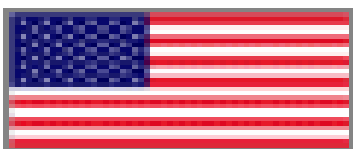


Source: Researcher's construction from various sources reviewed in this case study

Denmark used a logo and a strap line to promote a favourable perception of the country and its identity. These initiatives were intended to build a new image of the country. The image-building process involved the identification of new market segments while building on the new relationships. In order to position the destination in line with its new image, Denmark invited travel writers, decentralised tourism promotion and made regular updates on the website about what was happening in the country. Denmark was successful in lobbying for a new identity and lure tourists into the destination but it did not face travel warnings like what happened to Zimbabwe. Whilst the image rebuilding process was a success in Denmark, it has become a challenge in Zimbabwe considering the degree of political chaos prevailing in that country.

The situation that prevailed in Denmark differed from the situation that prevailed in the United States of America's after the September 11 crisis. The USA also dealt with its crisis in a different manner from Denmark, as discussed in the following case study.

4.2.2 United States of America.



The United States has enjoyed relative freedom from major threats to its tourists, although urban crime has been perceived to be a major factor in cities. However, the crisis that occurred on 11 September 2001 was catastrophic for the tourism industry

in the USA. The advent of the crisis led to a series of events that had a devastating impact on the American and other global airlines and on the tourism sector as a whole. The complete destruction of the World Trade Centre in New York and the damage inflicted on the Pentagon in Washington DC led to a thorough media scrutiny of the safety and security of ordinary citizens and of tourists. The damaged buildings were the centres of politics and business and also the headquarters to the world's largest media organisations, such as the New York Times (Beirman, 2003).

Never before had the USA experienced such devastation and loss of life in a single day. The issue of airline and airport security has since become the most challenging risk factor that the modern tourism industry faces. After the attack, the USA and several global industries faced a severe marketing challenge. The international tourism industry adopted a wait and see attitude, while in many parts of the world the promotion of travel to the USA was either cancelled or postponed.

4.2.2.1 Strategies for marketing the USA during 9/11 crisis

The mayor of New York City, Rudolph Giuliani, pleaded with all Americans and international visitors to show their support for and solidarity with New York by visiting it to spend time there and to pray there. The mayor was acknowledged nationally and internationally as a symbol of strength and determination in the face of the attack on the city (Beirman, 2003).

Local authorities put in a great deal of effort to attract tourists to come to New York. They used the sentiments of solidarity and patriotism in their efforts to lure the American people to New York. They also applied the strategy of reassuring potential

tourists of their safety in New York and backed up their appeal for solidarity with discounts, value-added incentives and subtle and varied psychological motivation. Hotel rates were reduced and promotional air tickets were made available to the travelling population. The New York City and Company used its website to promote restaurants, attractions, events and hotels. The company introduced a promotional initiative that offered to host American and foreign travel journalists to see the city for themselves and to write about it. The internet was used as a key communication tool and it was consulted as the main source of information by the media, academic researchers and consumers. NYC and Company actively sought to address the security and safety concerns that were raised by the travelling public and the travel industry (Beirman, 2003:53-56).

4.2.2.2 Major issues that emerged from the case study

The USA capitalised on the popularity of the mayor of New York City by using him as a brand personality and also capitalised on the brand-customer relationship through brand promotion. This brand-personality approach to branding proposes that a set of human characteristics such as the mayor was associated with the City. These human characteristics were personality traits such as concern, warmth, and authority.

The strategies that were employed by the USA during a crisis were similar to those employed by Israel. Israel has been at the centre of controversy for a long period, but has nevertheless employed a number of strategies for repositioning itself as a tourist destination. The strategies employed by Israel will be discussed in the following case

study. Some of the strategies that were adopted by the NYC and Company to reposition the destination are summarised below on Table 4.1.

Table 4.1 Destination brand development

Image analysis	Promotion strategies	Brand Identity
Strategic shift of the target market Developed a domestic tourism strategy Used local authorities to entice tourists, based on solidarity and patriotism Established an international crisis marketing team in collaboration with tourism stakeholders	Discounted hotel accommodation, air travel and restaurants Invited travel writers from across Europe Used websites for marketing purposes	Used the Mayor of New York as a symbol of peace All national tourist boards were encouraged to incorporate peace and reconciliation in their strategies Maintained a data base for tourists testimonials

Source: Researchers construction from various concepts reviewed in this case study

4.2.3 Israel



Israel has long been perceived to be a destination of pilgrimage and tourism. The country has shores on four different bodies of water. These bodies of water include the Mediterranean Sea, Sweet Water Sea of Galilee, Dead Sea and Red Sea. It has a variety of scenery, terrain and climate that ranges from snow-capped mountains to a barren desert. Israel has an excellent tourism infrastructure, road network, accommodation and multilingual ethnic groups with varied cultural backgrounds.

4.2.3.1 *Tourism crisis in Israel during the 2000 era*

The failure of the Camp David Summit in July 2000 to find a solution to the conflict in the region, led to the outbreak of violence between Palestine and Israel. The media asserted that Sharon's visit to the Temple Mount days before the outbreak of the 'Al Aqsa inti fada' was the cause of the violence. As a result of the violence, tourism became the principal economic casualty on both sides. Due to the combined blockade of the border posts in all Israel-Palestine administered territories, virtually all Western governments advised their citizens to defer travel to the areas over which Israel had authority. This advice led to a severe downturn in the number of visitors to the region and to plummeting tourism business (Beirman, 2003).

4.2.3.2 *The management of the crisis in Israel*

Israel had a well-developed contingency plan for the management of the short-term impact that the crisis had on its tourism industry. The Israeli government and tourist offices provided regular updates on the situation prevailing in the country. The major challenge was to counteract the negative impressions of the country that were being generated by the news media. The media had magnified the hostilities and depicted Palestine and Israel as war zones. In the face of this situation, Israel used an isolationist strategy in which the tourists were made aware of the trouble spots, followed by the message that "overall the country is safe". Israel hired an international public relations consulting firm to assist it to reposition itself as a destination (Beirman, 2003).

4.2.3.3 Major issues emerged from the case study of Israel

Table 4.2 Destination branding development

Destination brand



Source: Researcher’s construction from various concepts reviewed in this case study

Israel used a product-brand approach to develop its identity. This type of identity could lead to product-attribute fixation, but it was nevertheless the most appropriate strategy, because the destination was set to appeal to the stalwart markets. The aim was to appeal to the target audience with the use of product scope, product attributes, quality, users’ class category and the country of origin effect (Beirman, 2003). Whilst the significance of this approach is that it tends to increase the association with the occasions on which it was used and increases users’ association with the brand position, Zimbabwe has failed to adopt a product led approach in its quest for improving its image and identity.

The strategy employed by Israel was similar in principle to the response used by Sri Lanka, although it did differ to some extent in its approach. The strategies employed by Sri Lanka are discussed in the following case study.

4.2.4 Sri Lanka



Sri Lanka was known as Ceylon when it achieved independence from Britain in 1948. The government of the day renamed it the Socialist Republic of Sri Lanka. Tensions between the Tamil and the Sinhalese have become a feature of Sri Lanka's political life since the country gained independence. Since 1993 there has been a state of civil war between the Tamils and the central government, which has resulted in the death of more than forty thousand people. Despite some relative calm towards the end of 2000, there has been no lasting resolution to the dispute between the Tamils and the central government.

On 24 July 2001, the Tamil Tiger fighters launched a destructive attack on the Colombo International Airport. The attack resulted in the destruction of the greater portion of the Sri Lankan fleet of passenger aircraft. Several people were killed, including tourists. This incident derailed the significant progress that Sri Lanka had been making since the second half of the 1990s in respect of attracting tourists. International tourists who had abandoned Sri Lanka for less troubled destinations had begun to return to the country in the late 1990s when the Sri Lankan government was in a position to give tourists reliable guarantees regarding their safety, although it still warned tourists to avoid spots in the country in which political friction was occurring.

The marketing of a destination that is experiencing a crisis has not been the only challenge faced by Sri Lankan tourism. This destination has faced other challenges, such as unemployment, poverty, economic instability and various social ills for a period of more than twenty years. Although considerable effort has been made to isolate the country's political problems from its attractions as a tourist destination, there have been many instances in which the growth of tourism has been hampered and disrupted by acts of political violence. Such instances have been particularly severe when hotels, national airports and other elements of the national tourism infrastructure were targeted by political dissidents (Beirman, 2003).

4.2.4.1 Marketing Sri Lankan tourism during a period of crisis

The marketing of Sri Lanka is under government control and is highly centralised. The marketing function is carried out by the Ceylon Tourism Board, which was established by an Act of Parliament in the 1960s. The CTB is responsible for the implementation of the tourism policies of the Ministry of Tourism and Civil Aviation. The funds for the CTB are provided by the treasury. The CTB concentrates its marketing efforts on its key source markets abroad. It has honorary directors who are appointed in strategic growing source markets to act as conduits for promotional material (Beirman, 2003).

The Sri Lankan airlines and their general sales agents, which are located in fifty countries around the world, distribute promotional material on Sri Lanka to travel agents and their clients. The CTB's website is a very useful source of information on tourism, because it provides comprehensive destination information and current statistical and contact information in Sri Lanka and abroad. However, Sri Lanka has

failed to address the security issues and concerns that are raised by tourists, travel agents and tour operators. It could be argued that the incorporation of security issues in information sources may deter tourists, but Sri Lanka's problems are well known and have proven to be a disincentive to tourism. The failure to incorporate security issues in tourism information has led to a lack of confidence in the CTB's ability to assist travel professionals to plan viable itineraries for tourists who travel within the destination. Sri Lanka has used a denial approach to the crisis, whereas it could have benefited by publicly identifying the northern Sri Lankan area to be a no-go area for tourists, similarly to Israel's closure of the Palestinian authority areas (Beirman, 2003).

Sri Lanka established a Presidential Task Force on tourism. It comprised an honorary body of private and government representatives who were commissioned to prepare a tourism master plan for 2000 and beyond. The Sri Lankan government committed itself to an "open skies" policy for international air carriers and offered favourable tax arrangements to investors in tourism development. The marketing efforts were focused on special interest, high-yield niche markets, including the wedding and honeymoon market, health, ecotourism and soft-adventure market (Beirman, 2003).

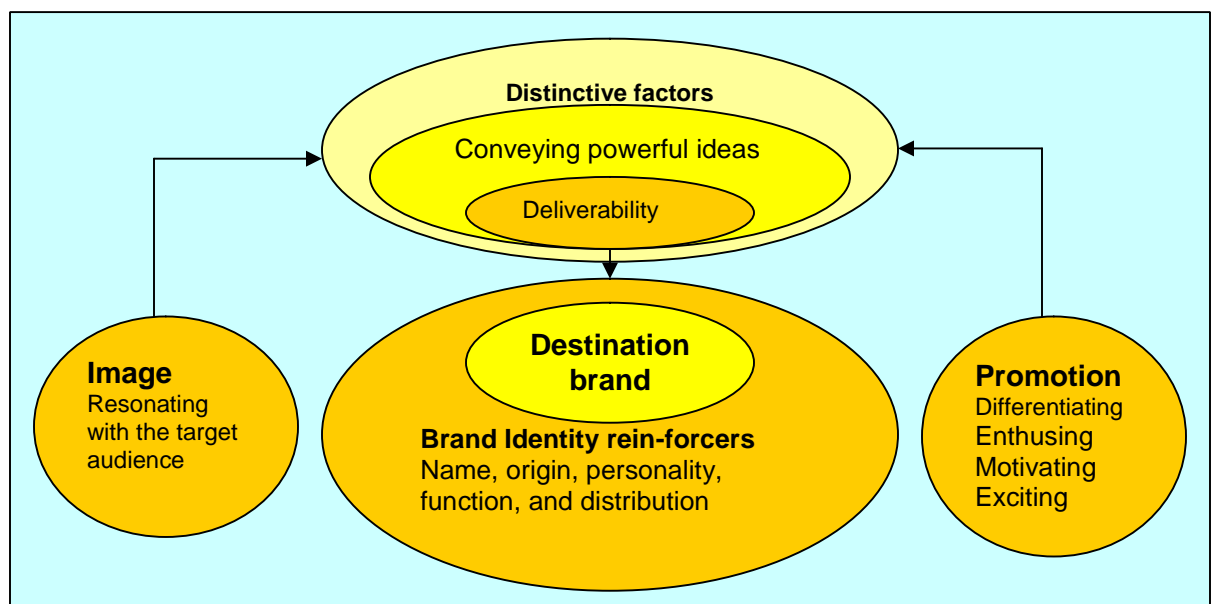
4.2.4.2 Major issues that emerged from the crisis situation

Brand-identity factors are linked to the emotional value of a brand, which in turn embodies the functional attributes of the brand. The success of any brand-identity strategy depends on the level of communicability, credibility, extension potential and

potential for internationalising the destination brand. Although Sri Lanka used a denial strategy, which contributed to its failure to deliver credible information regarding safety and security issues, the government did form the Presidential Task Force, comprising all tourism stakeholders, to develop a tourism master plan. However, the destination’s failure to publicly counter the concerns of the consumer and the industry regarding safety and security has had a negative impact on the distinctiveness of destination.

The key lesson that emerges from the Sri Lankan case study is that, if the image of a destination is negative, the negativity ultimately affects its ability to convey and resonate with the needs of its potential audience. These relationships are illustrated below:

Figure 4.2 Destination-brand development



Source: Researcher’s construction from various concepts reviewed in this case study

In order to increase the competitive advantage that differentiates a destination, Sri Lanka identified its distinct competencies that were valuable and communicable to the consumers; that were deemed difficult to imitate; and were unique in relation to competitors. These distinctive competencies were then communicated to the target audiences through the use of a website. Sri Lanka lowered the price of accommodation and promoted itself as a low-price destination, while focusing on niche markets that have high yields. It also distributed promotional material through the Sri Lankan air lines, travel agents and other clients that are located in more than fifty countries.

4.2.5 Nigeria



Nigeria has a population that is estimated to exceed 130 million and is the world's 6th largest oil producer (Nworah, 2005:4). It has been labelled as one of the most corrupt countries in the world (Nworah, 2005:4) and been linked with other negative socio-political issues. These perceptions of the country have affected the global image of the destination and have had a negative impact on its competitiveness as a potential investment centre. Accordingly, the 2004 Transparency International Competition Perception Index ranked Nigeria to be the third most corrupt country in the world, based on the findings of a survey of 46 countries (Nworah, 2005:4). Other problems identified in respect of Nigeria include bribery; unemployment; poor infrastructural development; over dependency on oil; poor work ethics; large-scale dissatisfaction

and disaffection with the government and with political structures in general; and inadequate funding of education, health and other key societal sectors (Nworah, 2005:4).

Long periods of military dictatorship, which saw the country's national treasures pillaged and citizens' rights abused, have also contributed to the negative internal and external image that Nigeria has. However, for destination branding to be as efficient as product branding, there should be an integration policy which was not the case in Nigeria. The policy should address such issues as the ability to act and speak in a co-ordinated and repetitive way about different themes. The Nigerian situation is exacerbated by the multi-ethnic composition of its population, its (Nworah, 2005:5) history of the detention of opposition leaders and the lack of an integration strategy (Nworah, 2006:2).

4.2.5.1 Re-branding Nigeria as the Heart of Africa

In July 2004, the Nigerian government, through its Federal Ministry of Information and National Orientation, launched the Nigerian image project, which was known as the Heart of Africa Project.

The co-operation between and involvement of all the representatives of government, business, the arts, education and the media (Nworah, 2005:6) fulfil a significant role in re-branding a destination. This judgement might have been based on several media reports, both nationally and internationally (Nworah, 2005:6).

The only campaign that has been recorded in respect of the promotion of Nigeria as a tourism destination is the “Welcome to Nigeria” commercial campaign, which ran in the Cable News Network (CNN) and featured the President, Olusegun Obasanjo, in a ceremonial role. The destination needed to create a system to link together the various organisations and departments that could form part of the brand. Co-ordination has continued to be a major challenge faced by the Heart of Africa (HOA) project (Nworah, 2005:7). The business world has not been encouraged to adopt the “made in Nigeria” logo, or the “proudly Nigeria” slogan in their branding. Hence, the project has been perceived to be a white elephant. Although there have been many economic and political reforms (Nworah, 2005:7), a great deal remains to be done to gain the confidence and faith of the citizens, potential investors and the (Nworah, 2005:7) the international community (Nworah, 2006:2) similar to Zimbabwe.

Table 4.3 Major Issues that emerged from the case study

Factors	Mix Elements
Image	<ul style="list-style-type: none"> ○ Did not conduct an image analysis ○ Stakeholders were not involved in the development of the brand ○ No co-ordination of the Heart of Africa campaign ○ Low coverage by the media
Identity	<ul style="list-style-type: none"> ○ The destination has not yet adopted the proposed logo ○ Need to develop ways to articulate the central theme visually ○ Need to restore confidence in the economic and political reforms
Promotion	<ul style="list-style-type: none"> ○ Need to synchronise messages through various channels to suit a particular audience ○ Need to identify a specific target market

Source: Researcher’s construction from various concepts in the Nigerian situation

4.2.6 Fiji



The island Fiji is located in the south-west Pacific, north-west of New Zealand.

It incorporates the longest continuous stretch of coral reef outside Australia's Great Barrier Reef. The Fijians are known to be friendly and hospitable people. Brochures promote Fiji as a destination that encapsulates all the beauty and romance of the Pacific. The conflict that prevails between Fiji's indigenous Melanesian minority and the large majority of Fijians of Indian origin has been the main cause of political instability since Fiji achieved independence from British colonial rule in the 1970s. Tourism is Fiji's main source of foreign exchange earnings and the tourism industry is the major employer of Fijians. Its principal attraction as a tourist destination is its image of being inhabited by friendly and warm people (Beirman, 2003).

4.2.6.1 The impact of the coups in 1987 and 2000 on tourism in Fiji

The coups of 1987 and 2000 in Fiji arose out of a concern among indigenous Fijians that they were being excluded from control over political, social and economic matters. The coups led to a change in the constitution that guarantees indigenous people the right to land ownership. International media gave extensive coverage to the 1987 coup. The events of the 2000 coup were transmitted instantaneously by technologically sophisticated international media and accompanied by live updates on the internet. It became a global media event. The coups were widely condemned

by the international community, which led Fiji to be suspended from the Commonwealth of Nations. The suspension was followed by boycotts of sports events, while Australia and New Zealand exerted intense diplomatic and economic pressure on the Fijian military and its indigenous leadership to crush the rebellion. Inbound tourism, especially from New Zealand and Australia, plummeted as a result of the coup.

Fiji had learnt several lessons from the effect of the 1987 coup. Fiji's visitors' bureaux had developed an effective contingency plan, which was deployed in 2000. The private and public sectors co-operated in setting the contingency plan in motion. Special deals were negotiated in respect of the prices of airfares and accommodation. However, the crisis recovery plan failed to exercise control over the travel advisory services in the key source markets. During both coups, tourism action groups (TAGs), comprising various stakeholders, were formed. The primary role of the TAGs was to formulate and co-ordinate a national crisis response and tourism recovery strategy.

The key to the success of Fiji's tourism was premised on its ability to diversify its source markets and make considerable progress in attracting a growing number of tourists from the Japanese, Korean and south-east Asian markets. Emphasis was placed on an attempt to increase high-quality accommodation and to appeal to new markets. In the case of Fiji, the perception of political instability and its ultimate manifestation threatened the desirability of the destination for tourists and tourism investors alike.

4.2.6.2 *Tourism marketing in Fiji after the coups*

After the coups, the Fijian tourism industry formed a Tourism Action Group, comprising the Ministry of Tourism and major private industry bodies. The TAG decided that its original 1987 campaign slogan, namely “Fiji, the way the world should be” was inappropriate and a new slogan, “Visit the Fiji you don’t know”, was developed.

The Tourism Action Group approached the governments of its key source markets to modify the travel advisory notices that they had issued to their populations, namely to defer travel to Fiji. This step was followed by the introduction of a significant reduction in prices of airfares, tours and other land arrangements in order to lure visitors from the key source markets to return to the destination. Market research was conducted on the key markets and on potential markets.

The research findings resulted in a diversification of Fiji’s tourism markets, including the promotion of ecotourism and the identification of more inland destinations. It also included the promotion of Fiji’s “MICE” [meeting, incentives, conferences and events] markets as conference and incentive destinations. The travel industry organised an intensive programme on marketing and promotion in key source markets, which included familiarisation tours that were aimed at tour operators and travel agents; and the hosting of international media staff and travel writers. These efforts were complemented by the doubling of the marketing and promotion budget for tourism.

In the course of the period between 8 and 18 August 2001, the ban that the British, Japanese, Australian and New Zealand governments had imposed on travel to Fiji was revoked. Fiji made extensive use of the internet as a marketing tool (Guillermo, 2005) to reach the tourism trade and travellers alike. The Fiji Tourism Board launched advertisements in journals that targeted the MICE market.

It cannot be stated with certainty whether the defeat of the Speight coup attempt has resolved Fiji's political divisions. However, it is clear from the coups of 1987 and 2000 that Fiji's economy and travel industry are vulnerable in the event of political instability (Beirman, 2003).

Table 4.4 Major issues that emerged from the case study

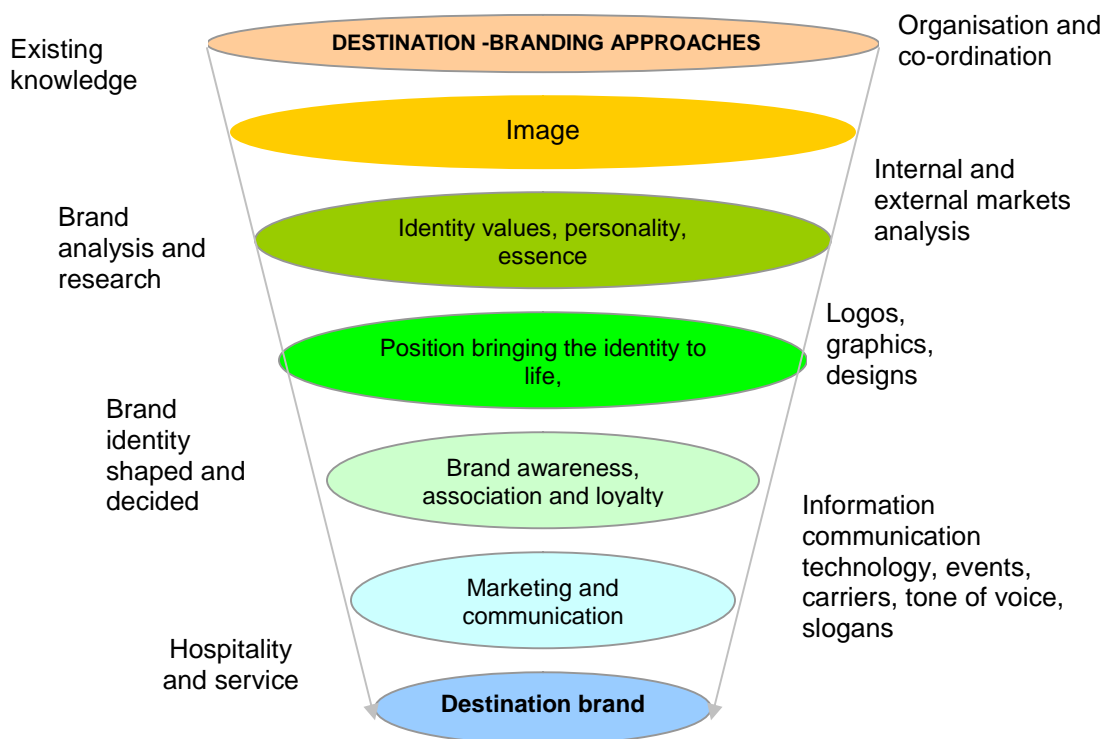
Factors	Mix Elements
Image	Vision and strategic analysis Policy, product design and Quality Status and distinctiveness Core values
Identity	Planning group Marketing events and risk analysis Comfort, relevance, slogan and signs ICT, internet and media
Promotion	Increased budget Price reduction Market diversification Target marketing Brand loyalty Brand association Brand awareness

Source: Researcher's construction from various concepts in the Fiji situation

4.3 A FRAMEWORK FOR DESTINATION BRANDING

This chapter focuses on approaches followed in other countries and the lessons that could be learnt from the case studies. Based on the preceding literature review of the approaches to branding that were applied in other countries, a theoretical framework could be developed that is based on the best practices that have been applied by destination marketers in their attempts to reposition a destination after it had experienced a crisis. The underlying assumption is that each destination already has a brand strategy in operation and that the major issue is to build brand equity. The action taken would then focus on four dimensions, namely image; brand identity; positioning; and marketing and communication. These matters are depicted in the destination-branding funnel below.

Figure 4.3 Destination branding funnel



Source: Developed based on the various concepts and literature reviews in this study

From the above analysis, it is evident that destination branding and positioning is encored on the target audience' existing knowledge about the destination, the image of the destination whether it is positive or negative. Successful branding is also dependent on the involvement of all stakeholders in the branding process. Therefore, carrying out an internal and external analysis serves as a basis for identifying the values, personality and essence of the destination.

The establishment of a brand identity tends to shape and direct the brand position. Positioning and identity can be enhanced through the use of logos, graphics and designs meant to reinforce brand awareness, association and loyalty. In addition, marketing and communication is meant to deliver a consistent image and project the destination in a positive note. The tools that can be used in this communicative process include, ICT, public diplomacy and slogans while service represents the promise and level quality expected. Based on the literature reviews, successful destination branding Zimbabwe should be encored on the recognition that the destination branding process may follow the steps such as those outlined in the destination branding funnel.

4.4 DESTINATION-BRANDING AND DIPLOMACY CAMPAIGNS

The purpose of public diplomacy is to seize an opportunity. Such diplomacy could also be understood to convey “soft power” and to afford nation opportunities to increase its familiarity with and appreciation by its visitors. Anholt (2003:6) recommends that public diplomacy should include the following:

“The governments should engage with mass audiences through the embassies of various countries, because the members of staff of the embassies communicate with foreign customers; the government should change its tone of voice on public diplomacy to the extent that it concentrates less on winning arguments and more on engagement; public diplomacy should focus on countries that are relevant to the destination; and conspicuous government involvement in public diplomacy could be counterproductive, but working through third parties is more likely to build trust”.

The actions taken in respect of the following destinations could be considered to be examples of successful destination branding and public diplomacy campaigns.

4.4.1 Scotland



The campaign of “Scotland the brand” was established in 1994 as a joint venture between industry and the government to promote Scottish trade and culture. The campaign has been hailed as a best practice in the creation and sustaining of an integrated and co-ordinated public/private sector initiative. The national logo was used as a status symbol on products that were exported to the global marketplace; encourage image cohesion and greater commercial value for Scotland; and even to contribute to the raising of the country’s profile (Vincente, 2004a).

4.4.2 Britain

From 1998 to 1999, the British Malaysia Industry, Trade Association, British Council and British Tourist Association executed a joint initiative that was aimed at enhancing comprehensive cultural inflows, investment and tourism between Britain and Malaysia. A logo was launched that symbolised the partnership between Britain and Malaysia. A strap line entitled “Just between friends” celebrated the close and long-standing friendship between the two nations. These initiatives were wholly sponsored by British companies in Britain.



The United Kingdom has used this campaign as a tool for improving co-ordination between the government, private sector and non-governmental organisations by focusing on key themes. By attempting to ensure that perceptions of Britain and the world are more closely aligned with the reality in Britain, the campaign explains what it is to be British and to make the whole larger than its component parts (UK in Malaysia, 2007). The approach included the use of public diplomacy and a strategy board and also involved i-uk.com, BBC World service, British Council, scholarships and foreign journalists.

The main purpose of the public diplomacy campaign was to comprehend and improve the perceptions of the people in the Malaysia and to increasingly promote appreciation for that which is embedded in modernisation, diversity, creativity and

success, which traits are relevant to lively inclusive, open and welcoming people. The campaign was intended to underpin political and cultural influences, commercial competitiveness and the ability to attract visitors, students, investors and diverse talents from Malaysia.

4.4.3. Spain



There are many destinations that compete for the attention of the tourist's mindset; therefore a one-stop website is an essential tool for a country that wants to brand itself as a niche destination. The website should be easy to use, have a user-friendly interface facility and be devised with clear objectives in mind. Countries that have designed effective websites include, Australia (<http://www.australia.com>), New Zealand (<http://www.purenz.com/>) and South Africa (<http://www.southafrica.net>).

Spain has an official website for tourism that is available online at (<http://www.tourspain.es/tourspain/home?langaugge=en>). It has been labelled a good example of destination branding for a tourist destination. Spain has been successful in conveying its image in such a way that it is conducive to changing the manner in which it is perceived by the international community. Its changing image has been accompanied by greater economic prosperity and strengthened democracy.

Spain launched its marketing campaign in 1982 during the soccer world cup. In the campaign, Joan Miro's sun design was used to symbolise the modernisation of Spain. This logo has now become the official tourism logo for Spain (Morgan *et al.* 2002).

4.4.4. Costa Rica



This destination has, in the course of the past few years, experienced rapid growth in so-called “sun and beach tourism”, especially in respect of the enclave destinations in the North Pacific area of Guano Caste. The Costa Rica Tourism Board, a government institution responsible for the marketing of tourism, took the lead in the campaign to increase tourism. The Costa Rica brand is aimed at positioning the destination as being rich in biodiversity.

In the course of the period between 1994 and 1998, President Figueres deliberately fostered for the country an image of being a sustainable tourism destination. Although the branding of the destination was initiated in the mid eighties, the brand “Costa Rica, no artificial ingredients” was launched in 1996 as part of a promotional campaign in the US. It has since been adopted as the official tourism brand. The destination also has an official website.

4.4.5 Central America



In order to market central America, seven central American countries collaborated to develop a regional brand and promotional materials, including a website (www.visitecentroamerica.com). A strap line for the region, “So little...so much...”, was launched in 2002 as a regional brand meant to position the region as a Central America geo-destination that has unique characteristics. The positioning of the destination was successful due to its exuberant tropical nature; its cultural wealth of pre-Colombian and colonial cultures; and the warmth and hospitality of its people, all in a relatively small territory (Central America.com, 2009). A partnership was formed between the private and the public sectors. It comprised the ministers of tourism who served as the presidents of the chambers of tourism in the seven Central American countries. When the partnership was formed in 2003, its main aim was to plan, co-ordinate and promote the marketing of Central America as a multi-faceted tourism destination in the European and Asian markets (Central America.com, 2009).

4.4.6. La Reunion



La Reunion is an island that is situated in the Indian Ocean. It has an intensely colourful landscape in which, for example, strong ubiquitous green contrasts with

delicate blue. It has positioned itself as an “intensive” island as emphasised by the logo above. Its logo bids the tourist a professional, natural and cordial welcome in accordance with Creole hospitality. It has branded its hospitality industry as possessing Reunion tourist quality (La Reunion, 2008). The Reunion tourist quality is maintained in terms of a quality charter that each member of the trade undertakes to respect. The destination has a website (<http://www.lareunion.webfronts.com>).

4.4.7 South Africa



South Africa has used communication resource centres (that, for example, monitor news reports on South Africa) to keep people informed about its profile as a tourist destination. It also maintains a web portal, www.southafrica.info. Furthermore, the country has managed to position itself through advertising at trade fairs, exhibitions and international events. The destination has promoted itself through the media by means of media briefings, press conferences, feature articles and even photo opportunities for journalists and travel writers.

The main purpose of these activities is to position South Africa as a “country alive with possibility” and to counteract any negative effect for its image that may emanate from problems such as HIV/AIDS and crime. In 2003, the country launched a strategic plan for marketing itself as a tourist destination (IMC, 2003). The main aim

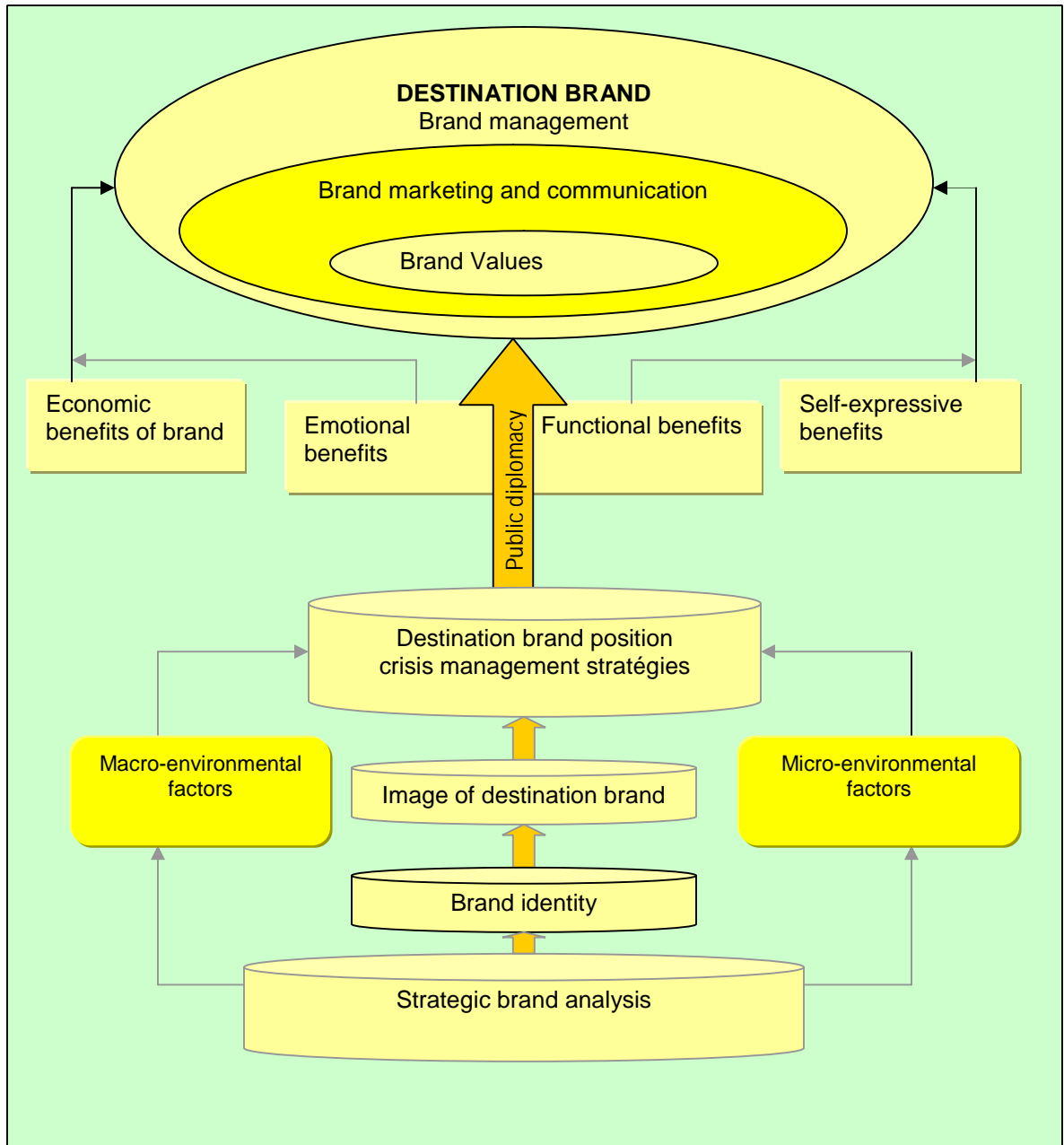
of the plan is to continuously and consistently provide stakeholders and potential customers with current information on the situation in South Africa.

4.4.8 Analysis of strategies for destination branding campaigns

Government representatives of many countries interact with private groups in other countries to gain an understanding of and to influence the public opinion in that country about the government's own country. In order to achieve the broad aims of public diplomacy, communication on current issues should be aligned with traditional diplomacy and with the salient events occurring in one's own country (Hart, 2008). Such diplomatic efforts should be supported by a strategic communication plan that involves the management of all the overall perceptions of a country (Leonard, 2002).

For the purposes of this research project, an analysis has been undertaken of the public-diplomacy strategies that have been employed by various destinations. A summary of these strategies is provided below in the context of branding-campaign strategies and with the use of a destination-branding and public diplomacy campaign model. The model has six layers, namely brand management; brand marketing and communication; brand values; public diplomacy; brand position; brand image; brand identity and brand analysis. The model that appears in figure 4.4 is a destination-branding and public diplomacy campaign model. This model has been developed from various concepts and the extensive literature reviewed in this chapter. The model is a combination of branding, positioning and public diplomacy strategies adopted by variously selected countries which were faced with an image problem similar to the Zimbabwean situation.

Figure 4.4 Destination-branding and public diplomacy campaign model



Source: Researcher's construction based on various sources reviewed this study

The bottom layer of the model comprises the elements of strategic brand analysis, brand awareness and brand identity. *Brand awareness and public diplomacy*

strategies that are developed for educational campaigns are aimed at using the local inhabitants as ambassadors to create awareness and to change negative perceptions about the destination. It involves emphasizing the brand's economic, emotional, functional and self-expressive benefits. *Brand identity and image* concern the use of symbols, names and strap lines that conjure up images, ideas, beliefs and opinions in the mind of the target audience. The objective of the brand identity can be achieved by rallying behind the brand and projecting the vision of the destination. A change in perception is needed and could be achieved by building on expectations, developing slogans/positioning and branding themes that are alluring to the target audience. The *strategic brand analysis* is premised on an analysis of the micro and macro environments. The analysis has an impact on the brand identity, brand image and brand position and has a bearing on the development of crisis management strategies.

The top layer of the model comprises brand management; marketing and communication; and brand values. *Brand management* is concerned with the creation of an environment that is suitable for the achievement of goals in a strategic manner. It focuses on the interests of the destination, diversity, culture and technology. The aim of brand management is to maintain and increase visitation. *Marketing and communication* concerns the use of the printed and electronic media to maintain relationships and convey information to various publics. It could also involve the use of embassies to influence mass audiences in other countries. The strategy is intended to foster media relations in order to gain positive publicity and control messages about the destination. *Brand value and positioning* is concerned with value creation that is aimed at maintaining relationships with individuals and customers. Its components include a changed tone of voice in public diplomacy and

international relations by providing assurance on peace and security and emphasizing tolerance.

4.4.9 Lessons learnt from the branding approaches

Several lessons could be learnt from the case studies contained in the above review of approaches to destination branding and positioning. The lessons can be applied to a country like Zimbabwe if it has to be branded and positioned as a tourist destination. These lessons are summarised below.

- The restoration and recovery of the image of a destination is largely dependent on the efforts made by the country concerned to market the destination. The recovery process comprises many elements, such as the repair of infrastructure, erection of buildings and rehabilitation of medical facilities and provision of funds. Successful recovery action demands a truthful assessment of the crisis situation.
- Failure to tell the truth could affect the integrity of the brand. In the long run the truth will be exposed and lead to the destination being viewed either negatively or positively as a result of the projected image. The lesson learnt about the open and honest management of marketing information is that it can result in short term pay for long term gain.
- A website has become an important tool in the dissemination of information and it should be updated regularly.
- Positioning a destination includes changing the strap line and/or the logo in order to develop new images, associations, awareness and values.

- Destination marketers and national authorities should work in conjunction with the private sector. In some cases, major consulting firms are hired to provide independent marketing and management advice.
- Crises have been managed with varying degrees of success. Destinations need to be pro-active in developing crisis management strategies in order to counter any negative equity.
- Strategic destination-brand management is an important element in destination branding, because it could be used to create an environment that is suitable to the achievement of goals in a strategic manner.

4.5 SUMMARY

This chapter has reviewed best practices in destination branding and the marketing of destinations during a crisis situation. Case studies on the actions taken in the United States of America, Israel, South Africa, Spain, Sri Lanka, Fiji, Denmark, Britain, Spain, Costa Rica, Central America, La Re Union and Nigeria were used to discuss the response strategies employed by these destinations during a crisis situation. The case studies revealed that, during a crisis situation, these destinations mounted promotional campaigns by means of the media, websites and public diplomacy strategies to counteract negative equity. The media carried reliable and verifiable information concerning the security issues within the destination.

Some destinations implemented strategies for obtaining global insurance cover for international travellers. In some cases, destinations employed price-cutting strategies in respect of accommodation and transportation in order to capitalise on volumes.

Simultaneously, some destinations organised familiarisation tours to areas that were unaffected by the crisis while engaging in public diplomacy to counteract negative perceptions. In some cases, destinations developed a new identity and a new slogan in order to attract visitors. It was noted that during a crisis situation it is necessary to shift the emphasis in marketing from those countries that are critical of the destination to those countries that are more relevant to the destination's interests. In addition, it was observed that some governments changed their tone of voice when articulating matters in the public diplomacy domain.

The next chapter considers a situational analysis of destination branding and marketing in Zimbabwe.

CHAPTER 5

A SITUATIONAL ANALYSIS OF ZIMBABWE REGARDING DESTINATION BRANDING AND POSITIONING

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CHAPTER 5

A SITUATIONAL ANALYSIS OF ZIMBABWE REGARDING TOURISM, DESTINATION BRANDING AND POSITIONING



Zimbabwe
Africa's Paradise

5.1 INTRODUCTION

The marketing of tourism remains a mere conceptual issue in some destinations. As a result, these destinations are failing to forge marketing strategies to promote themselves as tourist destinations (Reisinger *et al.*, 2006:3). The marketing of a destination should have the direct involvement of the government; tourism industry; and both the regional and international tourism organisations (Ross, 1994:45) in order to create a synergy in the development of tourism.

The aim of this chapter is to examine Zimbabwe's experiences in respect of destination marketing and to execute a situational analysis regarding the implications for branding and positioning strategies. The objectives of the chapter are to:

- Execute a situational analysis of Zimbabwe regarding the marketing of the country as a tourist destination;
- evaluate the strategies employed by the country in marketing the destination;
- discuss the factors that affect the destination brand and how these factors have contributed to a negative image and to poor publicity;

- examine the factors that could affect the destination's future branding initiatives; and
- explain the role of the tourism industry in destination marketing, branding and positioning in Zimbabwe.

5.2 AN OVERVIEW OF ZIMBABWE AS A TOURIST DESTINATION

Zimbabwe is a unique and fascinating holiday destination with a plethora of attractions. It is a land of extraordinary beauty, which has a rich diversity of wildlife (Lonelyplanet travel, 2007), with a total of 664 wildlife species, which represents approximately 7% of the world's known species. It has unspoilt tourist attractions that offer thrilling adventures that vary from white-water rafting, through traditional dances to bird safaris and ecotourism. This tourist destination is endowed with the magnificence of the mighty Victoria Falls, which is one of the Seven Wonders of the World. The rich wildlife in the Zambezi valley includes buffaloes and elephants (Lonelyplanet travel, 2007).

Zimbabwe was known for its friendly people and a multiracial society in which people of all nationalities lived in harmony. It had strived to become the best destination in Southern Africa, but a number of circumstances have blurred this vision. Zimbabwe, formerly Rhodesia, is a landlocked country in southern Africa that is situated on a high plateau between the Zambezi and Limpopo rivers, more than 300m above sea level. It borders South Africa, Botswana, Zambia and Mozambique. It has a population of 13 500 000 people (Adventure travel, 2008). It has a warm climate. The temperatures in the low veldt and Zambezi valley are hotter with up to 35° C in the

summer. Figure: 5.1 shows the location of Zimbabwe within its Southern Africa neighbours.

Figure 5.1 Map of Zimbabwe



Source: www.graphicmaps.com, 2008

a) Ancient History

The country has a fascinating history that provides depth and meaning to its people and the visitor. In Zimbabwe, the past and the present are inextricably part of everyday life (Lonelyplanet travel, 2007). Bushman artistry can be seen painted on

the walls of caves and overhangs, leaving a gallery of their experiences (Lonelyplanet travel, 2007) for the tourist to see. Portuguese and British explorers in the 1800s fought for the wealth that Zimbabwe has (Adventure travel, 2008). Harare, the capital city, has a wonderful and invigorating climate. Included among its modern buildings are the country's national galleries and national archives.

b) Attractions

The Victoria Falls is probably the tourist attraction in the country that lures most tourists from around the world. The falls are inescapable close to the natural elements. Tourists are fascinated by the towering column of spray when the river is high, the thunder of the falling water and the terrifying abyss that separates Zimbabwe from Zambia (Adventure travel, 2008)

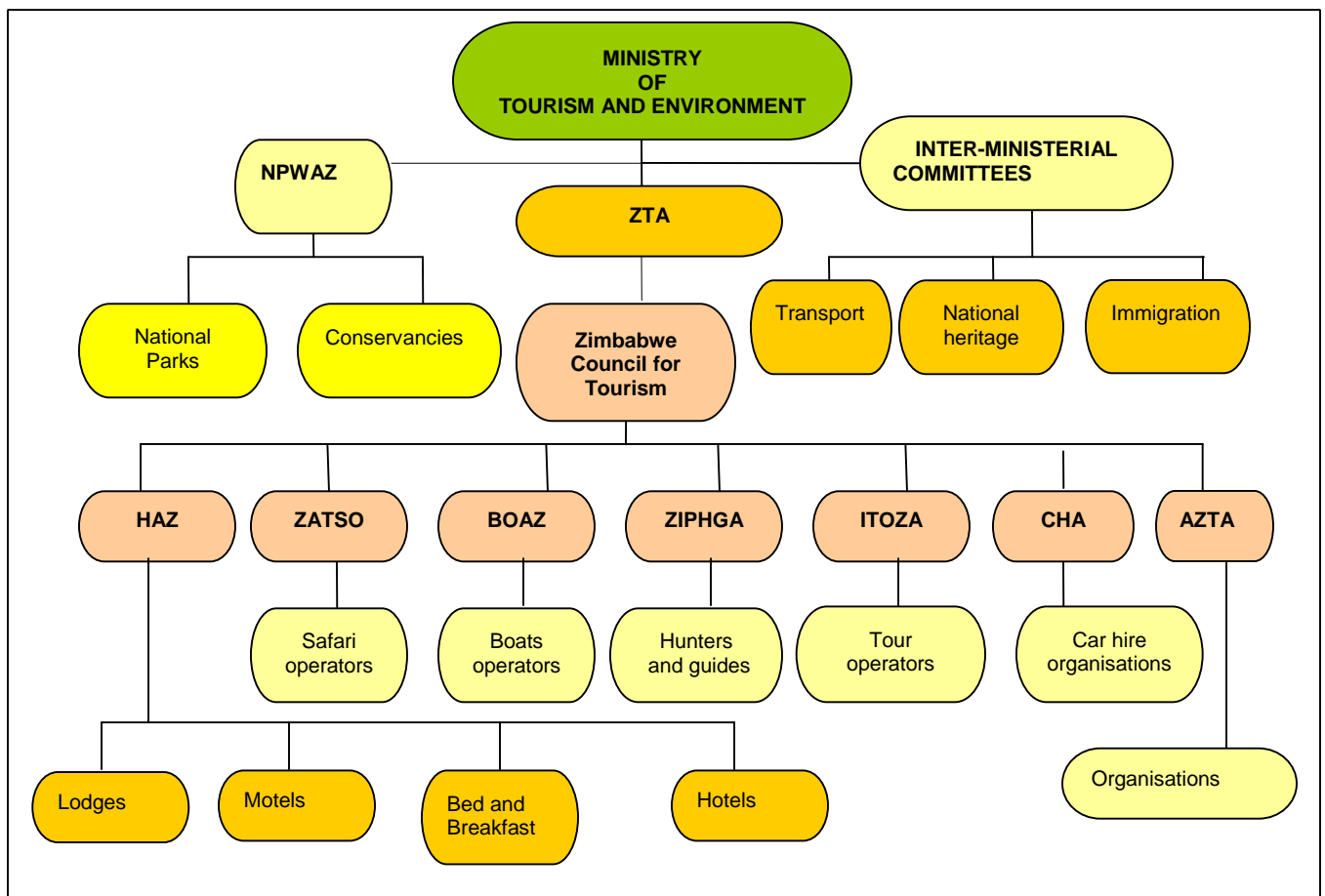
Other popular destinations in Zimbabwe include Lake Kariba, a great man-made inland sea that is nestled in mountains and bordered by enormous game reserves; the Mana pools, which lie in the Zambezi valley; Hwange National Park. the Eastern Highlands; the Great Zimbabwe Ruins, which lie in the south east of Zimbabwe and are the most extraordinary man-made ruins in Africa; and the Gonarezhou National Park, which is situated in the hotter and drier parts of Zimbabwe and is about 260km long and about 5 053 km² in extent.

5.3 THE STRUCTURE OF THE TOURISM INDUSTRY IN ZIMBABWE

The organisation of tourism activities in Zimbabwe can be differentiated into two distinct sectors, namely the public sector, which leads and drafts policies, and the

private sector, which represents the majority of investors in the industry. Tourism falls under the Ministry of Tourism and the Environment. The Ministry controls the two relevant authorities, namely the National Parks and Wildlife Authority of Zimbabwe (NPWAZ) as well as the Zimbabwe Tourism Authority (ZTA). The structure of these organisations is shown in figure 5.2 below.

Figure 5.2 Structure of the tourism industry in Zimbabwe



Source: Zimbabwe Tourism Authority, 2006

The NPWAZ is responsible for all wildlife management issues in the country and it is directly responsible for the management of conservancies. The Zimbabwe Tourism

Authority is responsible for all the tourism and marketing-related issues (ZTA, 2008:5). The ZTA also has authority over the Zimbabwe Council for Tourism (ZCT), which is a private-sector organ that represents the following sectors; Hospitality Association of Zimbabwe (HAZ), Zimbabwe Association of Transport Service Organisation (ZATSO), Boat Owners Association (BOAZ), Zimbabwe Professional Hunters and Guides Association (ZIPGA), Inbound Tour Operators of Zimbabwe (ITOZA), Association of Zimbabwe Travel Agents (AZTA) and the Car Hire Association (ZTA, 2006).

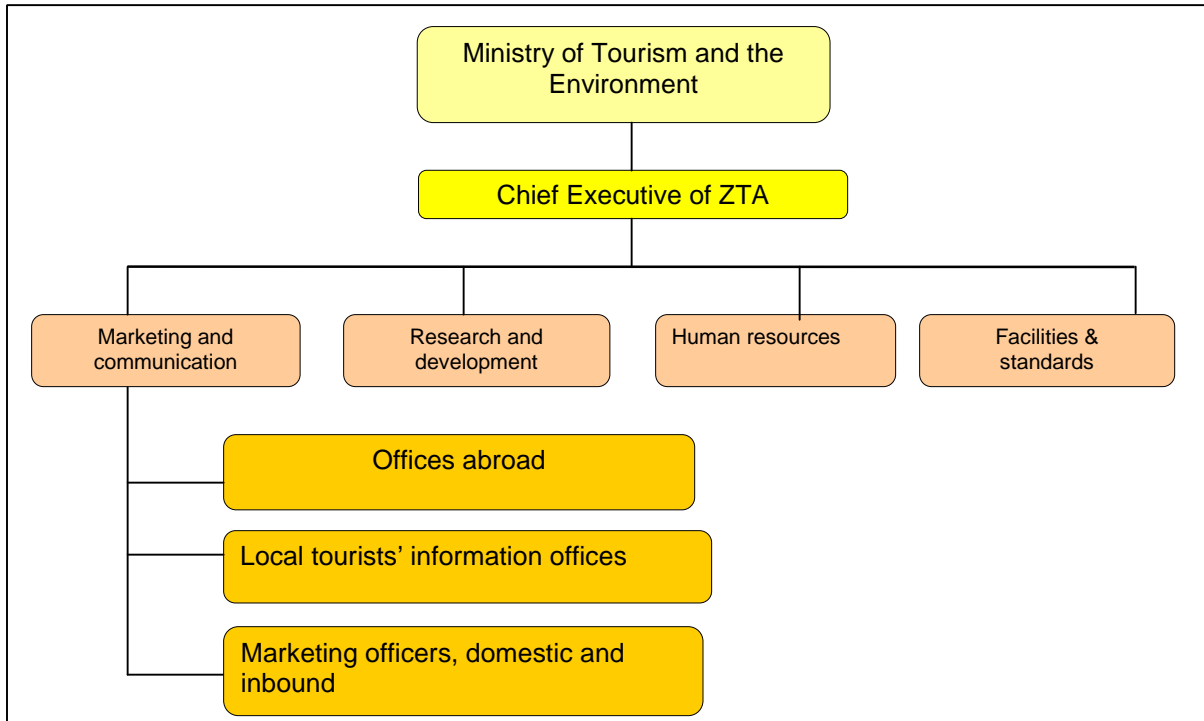
5.3.1 The public sector

The public sector falls under the Ministry of Tourism and the Environment, in 1996 the Ministry of Tourism and the Environment established an arm of government, called the Zimbabwe Tourism Authority (ZTA), through an act of Parliament. Chapter 14:20 of the Tourism Act of 1996 determines that the ZTA shall act as a national tourism board, which is defined as an organisation that is responsible for among other things the marketing and promoting of the destination (ZTA,1999:3-6).

5.3.2 The Zimbabwe Tourism Authority (ZTA)

Before ZTA's establishment in 1996, it was known as the Zimbabwe Tourism Development Corporation (ZTDC). The organisational structure of the ZTA and its link with the ministry of environment and tourism is illustrated in figure 5.3 below:

Figure 5.3 The organisational structure of ZTA



Source: Zimbabwe Tourism Authority, 2006

As an arm of government, ZTA is headed by a chief executive officer (CEO) who is appointed by the Minister of Tourism and the Environment as prescribed in the Tourism Act of 1996. The CEO heads all the departments of ZTA. He is responsible for the effective utilisation of the funds that are provided for the ZTA by means of a government grant (ZTA, 2000:3).

The ZTA envisions Zimbabwe to become a vibrant and preferred tourist destination for both local and international tourists who could enjoy the abundance and diversity of the country's resources and tourism products (ZTA, 2006). The ZTA works with various stakeholders to sustainably develop and promote Zimbabwe as a leading tourist destination through the setting up of high standards and the monitoring of the

achievement of these standards; undertaking of market research; and product development. The strategic objectives of the ZTA are to build and manage professionally the destination-marketing organisation. It is envisaged that the achievement of these strategic objectives could be achieved through team work and integrity, which would result in customer satisfaction (ZTA, 2000:4).

According to the ZTA (2003:6), the Authority has the following responsibilities:

- To promote Zimbabwe and its tourism industry to international, regional and domestic markets and to develop marketing skills and initiatives within the tourism industry;
- to promote high standards in the tourism industry through the establishment of standards and the provision of training. The monitoring and maintenance of standards is achieved through the registration and grading of designated tourist facilities;
- to undertake planning for the tourism industry, including the conducting of market research and the development of tourism databases. In addition, it seeks to promote awareness in Zimbabwe of the benefits of tourism by providing consultancy and advisory services in respect of tourism; and
- to investigate any matters that affect tourism and make recommendations to the Minister of environment and tourism on the administration of the tourism act and the promotion of the development of tourism facilities and infrastructure in Zimbabwe.

Whilst some of the major roles of ZTA are to promote Zimbabwe as a tourist destination, undertake market research and investigate matters affecting the tourism

industry, it seems the DMO has abdicated its duties since it has failed to strategically market and position Zimbabwe as a tourist destination.

5.3.3 Registration and grading of tourism establishments

Any person who conducts or operates or intends to conduct or operate a designated tourist facility is required to be registered with or graded by the ZTA (ZTA, 2004:7). However, before registration and grading occurs, the designated tourist facility is inspected by ZTA. Such inspection may require a report from a chief health officer of the Ministry of Health. After the registration of a designated tourist facility, the CEO of the ZTA issues a certificate of registration, which indicates that the facility is registered and graded (ZTA, 2004).

The Tourism Act of 1996 states that it is a prerequisite that any service whatsoever provided for tourists or any premises or place in or on which a service for tourists is conducted be called a designated tourist facility. Operators of tourist facilities who require a licence have to obtain it from ZTA. Liquor and the tour guide licenses are examples of licences that are issued by the ZTA to facilities and individuals who, respectively, provide and deal in alcoholic beverages and who guide tours (ZTA, 2005).

5.3.4 The private sector

The private sector tourism operators are an integral part of the tourism industry in Zimbabwe. This sector comprises tourism companies that are privately owned. The

large variety of companies in this sector makes it prudent for them to form associations that represent various groups of companies that share common interests and face similar challenges in the industry (ZTA, 2006:15). The private sector associations in Zimbabwe are varied and are headed by the Zimbabwe Council for Tourism (ZCT), which is affiliated to ZTA and deliberates on issues that arise from the industry and advise the ZCT members on the best way forward. The associations, which, according to the Zimbabwe Council for Tourism, represent various groupings, include, amongst others the Hospitality Association of Zimbabwe (HAZ), Boat Owners Association of Zimbabwe (BOAZ), Association of Zimbabwe Travel Agents (AZTA), Zimbabwe Association of Transport Services Organisations (ZATSO) and Inbound Tour Operators of Zimbabwe Association (ITOZA). As expressed in the names of the associations, they represent various groupings in the industry that come together to channel their concerns and suggestions through the ZCT (ZTA, 2002:10).

5.3.5 Functions of the Zimbabwe Council for Tourism (ZCT)

According to the ZCT (2005:8), the main functions of the Zimbabwe Council for Tourism are to:

- Provide a forum for the discussion and resolution of the common problems of tourism enterprises;
- make co-ordinated recommendations to the ZTA regarding improvements in the tourism sector;
- provide representation on tourism boards and committees;

- provide research findings and training that is relevant to the private sector;
and
- provide recommendations to the ZTA on policy issues and to lobby the government on certain practices that affect the industry.

Even though ZCT's functions are adequate, the organisation looks more like a club than a powerful body that can challenge ZTA and the government. This point has been strengthened by certain operations that ZTA engaged on, which some operators thought were disruptive to the operations of the Tourism industry. These operations were similar to Murambatsvina (by Government) and operation sun rise (by the Reserve Bank) which went on unabated by ZCT.

5.4 BACKGROUND OF TOURISM MARKETING IN ZIMBABWE

According to the ZTA (2004:6), during the period 2001 to 2003, the tourism industry experienced its worst business performance since Zimbabwe achieved independence in 1980. In 2003, the focus of the marketing efforts was shifted to the new markets with the posting of area managers to the non-traditional markets of Paris and Beijing. Only one posting was made to the traditional markets, namely to South Africa. The Chinese government conferred a preferred destination status on Zimbabwe in 2002. In September 2003, Zimbabwe launched the "Come to Victoria Falls, down in Zimbabwe" campaign in South Africa (ZTA, 2004:6)

The major challenge that the ZTA faced, was that of funding the external promotional activities. Zimbabwe also attempted to attend at least one major travel show in each

of the seven areas in which it is represented, such as the World Travel Market (UK), Indaba (South Africa) and ITB (Berlin, German). It has produced brochures, CDs, DVDs and videos (ZTA, 2003:4) for the purpose of marketing itself as a destination. ZTA has been involved in the ongoing consultations with relevant stakeholders (Immigration and Central Statistic Office) to improve the accuracy of the statistics on arrivals. Visits to border posts and ongoing workshops and meetings of the National Tourism Statistics Committee have been established. The ZTA has also been involved in enforcing compliance through the auditing of statistics in tourism establishments (ZTA, 2002:5). These statistics are meant to measure the utilisation of facilities and tourism receipts. The ZTA is also co-operating with the Reserve Bank of Zimbabwe to ensure compliance with the new Tourism Returns Forms (TR1 & TR2). The compilation of data for tourism satellite accounts through consultations with the relevant statistical organisations has kept ZTA visible in the industry (ZTA, 2004:7). It has been involved in visitor surveys, visitor expenditure, trends analysis, collaboration and the generation of tourism reports. It is hoped that the data will contribute to the development of the Geographic Information System on tourism (Hill *et al.*, 2002:5).

Zimbabwe is being promoted in China and its other traditional markets by means of road shows and the production and distribution of promotional material, which has been reproduced in various languages (ZTA, 2004:9). The distribution has been done through tourist offices, embassies and other related outlets. The ZTA strives to continually upgrade its website. On the domestic scene, the ZTA has attended local and provincial shows, such as the Zimbabwe International Trade Fair/Asambeni in Bulawayo and provincial agricultural shows in all the other cities (ZTA, 2005:6). The Destination Marketing Organisation is involved in the celebration of World Tourism

Day by holding celebrations in various centres. These celebrations support the Publicity Associations' programmes in major cities. Awareness campaigns that target schools, churches and other social groups have been launched (ZTA, 2005:6). The ZTA has been involved in the promotion of the destination, both locally and internationally, through travel expos and public relations activities in order to improve the visibility of its image. Corporate advertising has been undertaken in both the electronic and the printed media on special events, such as Heroes Day, Independence Day and the 21st February movement (ZTA, 2006:8). It has also been involved in hosting familiarization tours that are intended to increase the product knowledge of persons in the travel trade. Tour operators and travel agencies from various markets are invited each year while familiarization and educational tours are hosted for travel writers and prominent persons are invited to visit Zimbabwe.

As prescribed in the ZTA's duties, marketing has been one of its major functions since its inception. Apart from organising the "Shanyai/Vakatshani" travel expositions, Zimbabwe has entered the world of showcasing at the International Travel Bureau, ITB in Germany and Great Indaba in South Africa and has sent tourism attaché's to various source markets in order to promote the country as a tourist destination. In 2004, the ZTA participated in yet another type of marketing, namely the Miss Tourism World Beauty Pageant. Zimbabwe hosted the pageant upon its inception in 2004 and again in 2005 (Chidzidzi, 2006). As a result of the approved destination status accorded to it by the Chinese government, Zimbabwe has embarked on a "Look East" strategy, which is aimed at the Far East Asian market. This strategy has not delivered significant results in terms of tourist arrivals.

5.5 DESTINATION BRANDING IN ZIMBABWE

After Zimbabwe gained its independence in April 1980, the government aimed to disassociate the country from its negative past experiences, such as the colonial system, civil war, sanctions and the social ills that had contributed to it receiving negative publicity. The first step was to re-brand the country from Rhodesia to Zimbabwe. In its search for a relevant identity, the then Zimbabwe Tourism Development Corporation adopted a branding notion termed “Discover Zimbabwe”. The challenge was to gain the acceptance of the Zimbabwean people. Because this action was undertaken on an ad hoc basis, there was no sufficient time for consultations with all stakeholders (ZTA, 2000:15). Another great challenge was to make the brand work. The brand was associated with the successful transformation of the political system. The reforms made in respect of tourism did not have a great effect, because the government decided to largely maintain the status quo by targeting the low-volume and high-return type of tourist markets (ZTA, 2006:12).

The concept of destination branding is premised on the objective of understanding the target audience. Such understanding can not be achieved effectively when the people within a country act independently. The process of re-branding should be based on reality and credibility, otherwise the audience loses trust and confidence in the brand (Anholt, 2002). When the “Discover Zimbabwe” brand was adopted, very little consultation was undertaken. Some stakeholders were of the opinion that the brand was not well focused and distinct, because the same theme was being used in other destinations.

In 1996, the Zimbabwe Tourism Authority was established through an act of Parliament (ZTA, 2004:2). The establishment of ZTA presented an opportunity for the destination to re-brand. The existence of the ZTA did in fact bring about significant changes. As the branding initiative lacked consistency, the public and private sector bodies co-operated to map a way forward. The aim was to develop a comprehensive theme that would address all the issues surrounding brand association, perception, image and positioning (ZTA, 2006:4).

The image created by the old ZTDC brand was sometimes at odds with the other branding initiatives. In order to overcome the discrepancy, the stakeholders agreed, after extensive consultation, that they needed a positioning statement that would posture Zimbabwe differently. Consequently, with the help of the European Union (EU), a positioning was proposed and, ultimately, “Africa’s Paradise” was developed and adopted. Success in this field often requires considerable time and it is bolstered by other factors, such as economic reforms (Zimbabwe Human Rights Organisation, 2007), resources, markets, image, time and identity. It is the “Africa’s Paradise” positioning that recently faced several challenges as a result of the political and economic situation in Zimbabwe.

5.6 AN EVALUATION OF DESTINATION BRANDING IN ZIMBABWE

Seaton & Bennett (1996) argue that the marketing of a destination can only be done successfully by marketers who have a clear understanding and definition of the destination, because a destination is a complex and unique phenomenon. The geographical location and physical properties of Zimbabwe qualify it to be a

destination that can be marketed in respect of its intangible features of its history, people, traditions and culture.

Seaton & Bennett (1996) furthermore contend that “a destination is not merely an object, but that it has both physical and socio-cultural characteristics”. A destination is a concept that is formed in the minds of the tourists and is dependent on its image and tourists’ perception (Ngwodo, 2006:2). Very often tourists do not buy products per se, but are rather prepared to pay for an experience and a dream (Heath, 2007). According to Seaton & Bennett (1996:30),

“destination branding should follow clear marketing guidelines by assessing the current and future markets; auditing the destination and analysing its appeal to the markets; developing strategic objectives and marketing mix elements; creating an organisation to implement the objectives; and implementing and evaluating the results”.

It is these guidelines that are used to evaluate the status of destination marketing in Zimbabwe in this project. The guidelines are discussed individually in the sections that follow.

5.6.1 Assessment of the current markets and focusing on the future markets

Before a destination can embark on a branding programme, there should be a clear comprehension of the branding philosophy that is to guide the destination’s

marketing efforts. The starting point is premised on an understanding of the destination's objectives, target markets and marketing strategy. The more a destination knows about its customers and their attitudes, desires and behaviours, the better it will be able to design and implement the marketing efforts required to stimulate their purchasing habits (Middleton in Bennett, 1995:254).

No carefully crafted communication strategies have been produced to sell the "Africa's Paradise" phenomenon to the Zimbabwean citizens. The prevailing conception is still that tourism is for foreigners. According to Rogers (2003:40), there are five categories of people in any market, namely;

- Innovators. They are venturesome and educated people who have access to multiple information sources and have a large propensity to take risks;
- Early adopters. They are social leaders who are popular and educated;
- Early majority. They are deliberate, mainly informal social contacts;
- Late majority. They are sceptical and traditional people of lower socio-economic status; and
- Laggards. They constitute neighbours and friends. They can be the main sources of information that raises fear or doubt.

Zimbabwe does not appear to conform to these categories in its market segmentation, target marketing and positioning.

Zimbabwe has lagged dramatically behind its immediate competitors in terms of tourist arrivals during the period 1999 to 2005. Comparative figures are provided in table 5.1.

Table 5.1 Analysis of tourist arrivals in Zimbabwe and its competitors

Country	Year						
	1999	2000	2001	2002	2003	2004	2005
Zimbabwe	2.24	1.96	2.21	2.01	2.25	1.85	1.50
South Africa	6.02	6.0	5.91	6.2	6.66	6.82	7.13
Kenya	0.97	1.0	0.99	1.0	0.87	1.13	1.67
Zambia	0.4	0.46	0.49	0.57	0.58	0.69	0.97
Mauritius	0.5	0.66	0.66	0.67	0.7	0.72	0.76
Botswana	0.84	0.86	0.88	0.91	0.98	1.08	1.19
Namibia	0.7	0.76	0.86	0.75	0.7	1.01	1.09

Arrival in millions

Source ZTA, 2006.

South Africa is of special note in regard to the arrival of tourists in Zimbabwe's competing destinations. It has maintained its top position as the regional leader in tourist arrivals. In 2005, Zimbabwe lost its second position to Kenya after receiving 1.5 million tourists compared to the 1.67 million received by Kenya. Zimbabwe has the smallest market share in terms of arrivals from the high-value markets in Europe and America (ZTA, 2005).

Although the ZTA argues that the "Look East" policy has begun to bear fruits, Zimbabwe is still hard hit in terms of market share in comparison with its competitors (ZTA, 2005:8). The budget for tourism marketing activities in Zimbabwe has remained extremely small in comparison with other SADC countries. Comparative figures for 2005 appear in table 5.2 below.

Table 5.2 SADC country budgets (Southern Africa)

Country	Budget (US\$)
South Africa	36 000 000
Mauritius	20 000 000
Mozambique	6 000 000
Namibia	3 900 000
Zambia	4 000 000
Zimbabwe	200 000

Source: ZTA, 2006

Zimbabwe's bottom position in respect of the national budgets provided for tourism marketing activities illustrates the continued stiff competition that it is experiencing from its neighbours. According to Chidzidzi (2006), Zimbabwe's competitors have engaged in more offensive and aggressive marketing of their respective destinations in both the traditional and the emerging markets. Competitors have taken advantage of the world heritage site, the Victoria Falls, to position their destinations strategically in the target market. These competitors have used positioning statements such as, "Home of the Victoria Falls"; "We take you to the Victoria Falls" and "Fly and see the Victoria Falls" (ZTA, 2006:14).

Zimbabwe has failed to convincingly position itself and differentiate itself as the original "owner" of the Victoria Falls and, above all, that there is a better view of the falls from the Zimbabwean side (ZTA, 2006:14). Competitors have taken full advantage of the international media by using international newspapers, magazines, journals and electronic media to position their destinations in the target market, which illustrates the effectiveness of their marketing endeavours (ZTA, 2006:37).

5.6.2 Auditing and analysing the appeal of the destination to the target market

Over the years, Zimbabwe has used a focus strategy that is aimed at high yields and low volumes. This strategy has been affected by the political and economic challenges with which the destination is facing. Some weaknesses in the strategy have been noted. They concern the level of conceptualisation of tourism challenges at the human resources level and structural inhibitions in the limited budget allocation for the promotion of tourism (ZTA, 2000:8).

In the developed world, the name Zimbabwe evokes images of diseases, crime, lawlessness and general chaos (Raftopoulos, 2005:3). Tour operators and tourist-related companies in other countries are ill-informed about Zimbabwe and therefore the destination may benefit from a multination promotion strategy. However, political difficulties remain the main reason why policies that favour multination tourism promotion cannot be implemented successfully (Chan & Primorac, 2004:1).

5.6.3 Development of strategic objectives and marketing mix

There is widespread acknowledgement in Zimbabwe that tourism is a high growth industry and arguably the fastest growing industry in the world (WTO,2005). The decline in tourist arrivals in Zimbabwe has affected the performance of the industry in general. The decline has taken place at a time when other countries in the region are enjoying a positive growth in their tourist numbers (Ncube, 2006:6). Whilst the negative publicity and perceptions in various markets have mainly been attributed to

political developments, it has also been acknowledged that Zimbabwe does not have a strategic marketing plan to manage and market tourism; counteract negative publicity; reverse trends and initiate developments (ZTA, 1999:4). The result has been that there has not been a plan of action to find solutions to the problems that emanate from past activities or neglect and to guide and encourage change and development in a desired direction (ZTA, 2003:8).

In the face of all these problems, the ZTA developed a draft of a strategic marketing plan in 2006. The plan set out to turn around the tourism sector in conjunction with other sectors of the economy. The plan was developed within the framework of the National Economic Development Priority Programme (NEDPP) (ZTA, 2006:10), which has also given direction to the planning process that followed from the draft tourism policy (ZTA, 2006:4). The NEDPP comprises a task force that comprises representatives of the ZTA; ZCT; Ministry of Foreign Affairs; Ministry of Tourism and the Environment; and other stakeholders. The aim of the task force was to bolster the country's image abroad. Its efforts were complemented by the engagement of professional consultants who are experienced in destination marketing and public relations (ZTA, 2006:11).

5.6.4 Creating an organisation to implement the tourism objectives

Co-operation is a major feature of successful destination branding. At present, Zimbabwe does have a logo for its tourism organisation, the ZTA. However, there has been no strap-line that embraces the salient features of the destination. While the current positioning statement has no connection with the logo of the Zimbabwe

Tourism Authority, there appears to be a conflict between ZTA and the tourism industry in general.

The design of a destination logo requires that a great deal of sensitisation of the Zimbabwean people, including all the other stakeholders, should occur (Ngwodo, 2006:5). Moreover, the branding process involved only a few people within ZTA and therefore it has always been perceived to be a ZTA project. While ZTA, as the organization responsible for marketing Zimbabwe, has established objectives, there is a need for a collaborative approach that will ensure synergy between all the views and aspirations of the stakeholders in tourism. The centralised marketing of tourism in Zimbabwe has become a bottleneck and hampers effective destination marketing. For this reason, the industry has not accepted ownership of the marketing efforts and has instead blamed the government for failures (Mavudzi-Kamphorst, 2006:6).

5.6.5 Implementing and evaluating tourism marketing strategies

The marketing of Zimbabwe as a tourist destination should capitalise on a diffusion strategy in terms of which innovation is communicated over time to the members of the social system by means of a selection of communication channels (Nworah, 2006:4). With the failure of the destination to adopt a diffusion of innovation strategy, the “Africa’s Paradise” branding project may be at risk. Nworah (2006:4) has suggested that, in order to implement the branding strategy successfully, the destination should be projected by means of the following communication channels: advertisements, road shows, events, symposia, press releases, media relations, documentaries, publications, web strategies and even public diplomacy exercises. While such a framework would probably be ideal and effective, it may not be possible

to implement it under the present conditions. It is therefore very important for the destination to evaluate all its strategies and to monitor its performance from time to time (Buhalis, 2000:99).

5.7 THE SWOT MATRIX OF DESTINATION BRANDING IN ZIMBABWE

Table 5.3 below contains the results of a detailed SWOT analysis of Zimbabwe as a tourist destination. The table indicates the strengths, weaknesses, opportunities and threats that the destination faces using statements that have been acquired from various sources.

Table 5.3 (a) Results of the SWOT analysis of destination branding in Zimbabwe

COMPONENT MIX	STRENGTHS	WEAKNESSES
Marketing and communication	<ul style="list-style-type: none"> ▪ High level of awareness of tourism benefits ▪ Informational and directional signs available ▪ Well-co-ordinated marketing programmes ▪ Attaches in international source markets ▪ Broad market coverage ▪ Good marketing skills ▪ Well known brand name ▪ Low volumes, high returns 	<ul style="list-style-type: none"> ▪ No clear objectives, marketing and promotional plans ▪ Over promising and failure to deliver. ▪ Destination too expensive ▪ No defined market share ▪ Centralised marketing ▪ Poor brand image ▪ High growth without direction, segments not properly targeted ▪ Loss of consumer goodwill ▪ Weak brand promise ▪ Inappropriate positioning statement. ▪ Poor image of the destination in source markets ▪ A negative perception about the country's offering ▪ Wrong signals sent out to the international world

Enabling environment	<ul style="list-style-type: none"> ▪ Peace and tranquillity ▪ Proper government legislations and tourism 	<ul style="list-style-type: none"> ▪ No foreign currency ▪ High level of inflation (100 000% April 2008) at compilation time ▪ Shortage of fuel ▪ Shortage of financial resources to fund promising strategic initiatives ▪ No open skies policy ▪ Being defensive instead of being introspective.
Brand image and positioning	<ul style="list-style-type: none"> ▪ A wide product base, uniquely different ▪ A wide range of local festivals, events and activities ▪ Adequate number of parks and outdoor recreation activities ▪ Well-developed support services ▪ A well-organised tourism industry ▪ Appropriate organisational structure within the tourism industry 	<ul style="list-style-type: none"> ▪ No clear strategic direction ▪ No cohesion between the private and the public sectors ▪ Stakeholder and ZTA do not have shared vision ▪ No alliances and joint ventures with other international bodies ▪ Withdrawal of major international airlines

Table 5.3 (b) The SWOT analysis of destination branding in Zimbabwe continued

COMPONENT MIX	THREATS	OPPORTUNITIES
Marketing and communication	<ul style="list-style-type: none"> ▪ No communication plan for brand adoption strategies ▪ Hostile and unfriendly coverage of Zimbabwe in the international media ▪ Loss of market share ▪ Slower market growth and implementation of the "Look East" policy ▪ Expectations by tourists not met by the brand promise ▪ East Asian tourists vie for destinations similar to their countries ▪ The brand does not elicit nostalgia in the target market ▪ No use of the Internet as a marketing tool 	<ul style="list-style-type: none"> ▪ Identify visitor satisfaction needs through market research and intelligence. ▪ Exploit new market segments. ▪ Research on the consumers' needs and expectations, not numbers and figures. ▪ Build a positive image both locally and internationally. ▪ Re-brand and reposition the destination. ▪ Seek fast market growth potential. ▪ Carry out customer feedback programmes through attachés. ▪ Plan travel writers and travel agents familiarisation trips and always tell the truth. ▪ Undertake public relations exercise through the press, both print and audio, and use the internet to relay the information. ▪ Conduct travel events and launch tourism

		<p>week to which international icons and reputable personalities are invited</p> <ul style="list-style-type: none"> ▪ Develop a strap line and a brand promise that is appealing to the target market ▪ Never engage in a tug of war with international journalists, but invite them so that they have the first hand information ▪ Remain visible at all times and always offer a counter concerning any negative publication and promise to improve the situation
Brand image and positioning	<ul style="list-style-type: none"> ▪ Increased advisory issued by governments to their citizens that Zimbabwe is not a safe destination ▪ Downturn in the economy as a result of inflation ▪ Increase in destinations offering the same or similar product lines ▪ Zimbabwe known internationally for the wrong reasons ▪ Stereotyping and labelling of Zimbabwe as a war zone ▪ No defined strategy on international tourists ▪ The SADC tourism has been dormant in promoting the region ▪ Over dependency on international tourism. 	<ul style="list-style-type: none"> ▪ Devise trail blazing strategies through the involvement of all the stakeholders in the planning and implementation of strategies. ▪ Vertical, forward or backward integration through the acquisition of tour operators or airlines. ▪ Encourage collaborative investment. ▪ Invite ambassadors from source market governments to sample the tourism products ▪ Create multiple linkages within SADC, both for promotion purposes and the creation of peace parks
Enabling environment	<ul style="list-style-type: none"> ▪ High seasonality of tourism products ▪ Increase in the regional and international competition for tourists ▪ Increase in terrorist activities ▪ Spying by the government of Zimbabwe on cellular phones and the Internet ▪ Negative attitudes by the international governments to effect regime change in Zimbabwe ▪ No alliances or strategic mergers with international intermediaries in the generating regions ▪ Introduction of “smart sanctions” targeted at high-ranking government officials. 	<ul style="list-style-type: none"> ▪ Ensure maximum safety and security for tourists through zoning i.e. hooligan free zone

Sources: Adapted from various statements regarding the state of tourism, socio-economic and political conditions in Zimbabwe.

The SWOT analysis has revealed a high level of lack of marketing and communication strategies, poor enabling environment which is coupled with a poor brand image and positioning.

5.8 MATTERS THAT COULD AFFECT FUTURE DESTINATION

BRANDING AND POSITIONING IN ZIMBABWE

The main task of branding a destination should never be left entirely to the tourist marketing organisations (Nworah, 2005:5). It is incumbent on the country's leadership to embark on public and economic diplomacy in order to attract investment and integrate the destination into the global community (Nworah, 2006:4).

In the light of the analysis undertaken thus far, it has become apparent that several matters could affect future branding initiatives in Zimbabwe. Each of these matters is discussed separately in the following sections.

5.8.1 Policies and political matters in the destination

Since Zimbabwe gained independence in 1980, President R G Mugabe has been at the helm of the government, initially as Prime Minister and later as President after he had merged the two main parties, the Zimbabwe African National Union Patriotic Front (ZANU PF) and the Zimbabwe African People's Union Patriotic Front (ZAPU PF), in 1987 (FinGaz, 2009). Mr Mugabe's Marxist background inclined him to construct a one-party state, but his former colleagues, such as Mr Edgar Tekere and Ms Margaret Dongo, strongly opposed the idea. Eventually, in 1999, Mr Morgan

Tsvangirai formed the Movement for Democratic Change (MDC), a party that has become a major threat to Mugabe's ZANU PF party (Raftopoulos, 2005:2).

Civil society in Zimbabwe has been under threat as a result of the misconception that NGOs sympathise with the MDC (Zimbabwe Human Rights NGO Forum, 2003:4). The NGOs activities are hampered by government regulations, especially in respect of foreign funding of the local human rights organizations and the distribution of food aid (Zinhumwe, 2008:1). Despite these disruptions of NGOs' activities, the ruling party, under the leadership of Mr Mugabe, has promulgated laws that enable the government to seize white-owned farms under the pretext of the redistribution of land among the marginalised groups (Matchava-Hove, 2006:9).

The seizure and redistribution of land was supported by many African leaders, despite the measure being considered to be unreasonable and tyrannical in the eyes of the West. Mugabe had persuaded most African opinion formers to legitimise his policies, particularly regarding the issue of land redistribution (Pfaffenroth, 2008). The agreement reached at the 1979 Lancaster House talks on a willing buyer willing seller influenced and controlled Mugabe's actions until 1999. In the 2002 presidential elections he finally obtained the approval of the electorate to seize land from the white farmers (FinGaz, 2009:6).

The situation in Zimbabwe has been marked by chaos, hatred, corruption, and confusion as a result of the agrarian reform programme that Mugabe embarked on in 2000, after losing in the referendum that was called to change the constitution (Chiwanza, 2002:4). The land reform programme resulted in negative publicity, which has had a detrimental impact on the image of Zimbabwe as a tourist destination in its

source markets. The decline in the number of tourist can be deduced from the low number of people arriving in the country (Tribune Staff, 2008).

Many tourists shun the destination in favour of more stable and peaceful neighbouring countries. The destination has been perceived as being unsafe in comparison with competing destinations in the region (Pfaffenroth, 2008). While Zimbabwe has a relatively low rate of violence against tourists, it has been suggested that more fundamental issues of national identity and self-identity should be addressed in order to restore the identity of the country as a tourist destination..

5.8.1.1 Policies

The various laws and regulations that address tourism in Zimbabwe directly or indirectly should be reviewed with the prime purpose of identifying areas of duplication and contradiction. The legislation concerned involves wildlife; museums and national monuments; environment; and local authorities (Mutsambiwa, 2006:4). There is an urgent need to harmonise the legislation with the Tourism Act in order to achieve an integrated approach towards the achievement of the destination's objectives (ZTA, 2005:6). The review of these policies should be aimed at reflecting a thorough co-ordination between tourism planning and physical planning.

The air transport policies are also a cardinal consideration in the destination's accessibility, especially to long-haul markets. The destination should enter into negotiations and conclude contracts with viable airlines in order to ease accessibility of the destination by international tourists.

5.8.1.2 Visa regime

The current visa regime is such that countries are divided into categories in terms of the visa requirements for their citizens, namely

- (a) visa not required,
- (b) visa issued at port of entry on the payment of the requisite visa fee and
- (c) should apply for a visa prior to travelling (Ministry of Foreign affairs, 2007:6).

The visa requirement issue is a major consideration, especially when it is borne in mind that competitors in the region are targeting the same markets. The competitors have multiple-destination packages and they have adopted a visa exemption policy for the UK, France, German, China and Japan. In order to attract visitors from a wider market segment, the destination should consider the introduction of visa exemptions for its target market in order to increase its market share (ZTA Draft Marketing Plan, 2005:8).

5.8.1.3 Politics

Zimbabwe is fast becoming one of the tragedies of modern Africa. The government is unable to manage hyper inflation and is unwilling to heed advice (Pfaffenroth, 2008). Normal social and economic activities are being replaced by survival strategies and more than 35% of the Zimbabwean population is likely to require food aid in 2008 (Sachikonye, 2008:10). The political mediation process, led by President Mbeki of South Africa, has failed to bring about a constitution that could ensure free and fair elections and this situation has increased the possibility that the octogenarian President Robert Mugabe may stubbornly cling to power (Zimbabwean Situation, 2006). Ordinary Zimbabweans do not have the right of assembly in

Zimbabwe and intolerance of peaceful protests prevails. The government uses the Public Order and Security Act (POSA) to ban rallies and meetings and enforces the ban by means of violent police aggression (Zimbabwean Situation, 2004). More than 700 000 Zimbabweans were left homeless in 2005 following the demolition of their informal urban habitats under operation *murambatsvina* (“clear out filth”), which the government claimed was a clampdown on law and order. The public opinion is that the operation was politically motivated and was in fact an action taken against potential strikers who are MDC supporters (Sachikonye, 2005:5). Although President Mugabe defended his actions at the Millennium Summit in New York, a United Nations (UN) high-level report condemned the government for causing unjustifiable suffering to so many disadvantaged people (Zimbabwe Human Rights Forum, 2007). All these factors could cloud the re-branding process, if corrective action is not taken.

5.8.2 The economic environment

The continued rise of the inflation level in Zimbabwe has eroded the purchasing power of the Zimbabwean currency. The depreciation of the Zimbabwean dollar against major currencies has become a cause for grave concern. The diminishing purchasing power of the Zimbabwean dollar has given rise to a parallel market, which in turn has led to price distortions and made the destination very expensive. Even the ZTA has confessed that it has used the parallel market to obtain foreign currency (Chidzidzi, 2006). The impact of this situation on the tourism industry has been that the pricing structure of the tourist operators has become distorted. The Tribune Staff (2008:1) has observed that the overall effect has been that the destination has become increasingly more expensive than its competitors. The

purchasing power of the domestic tourist has also declined, which has resulted in low levels of domestic tourism activity.

Similarly, the inflation rate, which was higher than 230 million percent in December, 2008 and the highest in the world for a country that is not at war, has caused both consumers to change their spending habits and investors to be extremely cautious. These trends have been demonstrated by a decline in the real value of the disposable income of the population, which has impacted negatively on domestic visitation. In some instances, the continued decline in the number of visitors has resulted in some tourist businesses closing down (ZTA, 2002). The exchange rate between the Zimbabwean dollar and the United States dollar has been so high that stakeholders in the destination have raised their concern over the fact that the local currency is overvalued against the major currencies. This imbalance has provided the conditions for the parallel market (black market) to continue to thrive (Mambondiani, 2008:1), which is to the detriment of bona fide exporters (ZTA, 2006:5).

Galloping inflation (of 230 million percent in 2008) and the fluid and high interest rates have caused major problems for the tourism industry in respect of international credit cards (ZCT, 2005:4). Furthermore, the cost of borrowing is so prohibitive that it is difficult to execute major capital projects. The trend in a high-inflation economy is that the cost of borrowing continues to increase and translates into the charging of higher and more speculative prices, making the destination prohibitively expensive. Therefore monetary policy instruments should be introduced with due cognisance of promotional incentives for tourism (Muponda, 2008:2).

The shortage of foreign currency has impacted negatively on the destination. Currently the foreign currency that is available through the normal channels is inadequate and the ordinary citizen therefore tends to resort to the parallel market (i.e. the unofficial rate). Monetary instruments should address this anomaly (ZTA, 2006:44).

The pricing of tourism products is the key element with which most marketers differentiate their markets. The pricing of tourist products should take the consumers' perceptions and their buying behaviour into consideration (ZTA, 2006:30). Zimbabwe's major competitors have come up with short-term incentives to stimulate demand and gain a differential edge.

Even though the DMO may have minimum control over pricing at the business level, tourism operators do have major control. They influence and can even decide on the tour packages that are to apply in a given destination. Competing destinations are instrumental in selecting and packaging tours for specific market segments (Zimbabwe Tourism Authority, 2006:12). The policy makers in the Central Bank of Zimbabwe have ignored the advice of the International Monetary Fund on the management of the hyper inflation. Instead they have resorted to printing money indiscriminately and enforced arbitrary price cuts that render businesses unprofitable (Mafaro, 2008:1). The situation has been exacerbated by the failure of the government to sustain normal relations with the international community. The destination was expelled by the Commonwealth in 2002 as well as by the International Monetary Fund (IMF) and cut off from almost all the mainstream sources of aid. However, President Mugabe has developed a relationship with China in terms

of which his government has negotiated multi-billion dollar investments in return for raw materials (FinGaz, 2009).

5.8.3 The social environment

The socio-cultural environmental factors that affect tourism include the size and structure of the population; mix of social classes; attitudes and values. Zimbabwe has a population of approximately 13.5 million (Sachikonye, 2005). The population does have a rising black middle class with the potential for domestic tourism and investment, but the destination should develop a domestic tourism strategy in order to tap into this potential market niche.

While the destination enjoys a base of skilled manpower, the economic hardships that prevailed over the past few years has led to a brain drain that has also affected the tourism sector (ZTA, 2003:6). The decline in the performance of the industries and the key economic sectors has led to large-scale unemployment and the closure of several companies and has reduced investment inflows (Matamisa, 2006:10). The decline has resulted in an increase in poverty-related crimes that have impacted negatively on the tourist industry and the destination's image in general (Chidzidzi, 2007). Therefore there is an urgent need for strategies that could contribute to a reduction in crime.

The continued increase in the number of HIV and AIDS cases continues to have a negative affect on the tourist inflows in several international tourist destinations,

including Zimbabwe (ZTA, 2006:44). The negative impact of HIV/AIDS on the country's image is a matter that requires urgent, but circumspect, attention (ZTA, 2006:32).

Any discussion on the pursuit of the Millennium Development Goals (MDGs) in Zimbabwe is superfluous in the context of the current social and economic breakdown (FinGaz, 2002:6). The economy has contracted by 35% in 4 years; education and health are characterized by strikes, staff shortages and unaffordable fees; and household goods are either unavailable or available at exorbitant prices (Pfaffenroth, 2008). Such is the impact of extreme inflation that the MDGs benchmark of \$1 per day for persons who live in extreme poverty now applies to the greater part of the population, including qualified health workers, teachers and public sector workers such as policemen and soldiers.

The strides that had been made prior to 1998 through the building of schools close to residential areas and the provision of free primary education, which made Zimbabwe the African country with the highest literacy rate, are speedily being eroded as a result of high school fees and a high number of teachers who have left the country for neighbouring countries (Chan & Primorac, 2004:).

Malnutrition has inevitable consequences for health indicators and affects in particular the vulnerable members of the population, i.e. especially the young, the aged and those living with AIDS. Life expectancy in Zimbabwe may now have fallen below 40 years, possibly the lowest in the world, while child mortality has increased steadily since 1990 (FinGaz, 2009).

5.8.4 The technological environment

Moyo (1997:5) argues that “there has been rapid global growth in information and communication technology and that it affects people’s daily lives and their business transactions”. Tourists and tourist destinations are separated by varying degrees of distance. This distance contributes to difficulties in respect of tourist distribution. Zimbabwe is affected by its distance from its tourist source markets, because most of its tourist source markets are long-haul destinations. The failure to communicate effectively with actual and potential consumers has serious implications for Zimbabwe’s success as a tourist destination. The growing sophistication of information technology, particularly the advent of mediums such as the Internet and e-mail, has increased the speed and standard of communication to an unprecedented degree (ZTA, 2002:8). Zimbabwe should invest in technological infrastructure that is supportive of tourism. Successful destinations have used information technology opportunities to great effect in promotion, distribution and service delivery (ZTA, 2006:47). Information technology can fulfil a very significant role in the development of a destination.

Despite the significant role fulfilled by the ZTA, there appears to be a lack of resources in Zimbabwe to fully embrace and exploit the new technological advances and to engage in e-tourism in order to match competitors’ strategies. Information and communication technology (ICT) has an impact on the quality of tourism goods and services; distribution systems; and access through direct marketing in source markets. On the other hand, limited technology, or a lack of it, may lead to the tourism product or service becoming obsolete or subject to fierce competition as is the case in Zimbabwe (ZTA, 2006:46).

5.8.5 The ecological environment

According to Chidzidzi (2006), “the Zimbabwean government acknowledges the relationship that exists between the environment and the development of sustainable tourism”. The DMO should ensure that the development of tourism is based on a careful assessment of the carrying capacities of the local environment (ZTA, 2005:5). However, when the Zimbabwean government embarked on its land reform programme, a number of anomalies occurred. Animals were slaughtered in large numbers. In some cases deforestation followed. Due to a lack of proper land planning, some resettlements were done on land that was unsuitable for the purpose. As a result of these errors, top soil has been lost, resulting in some places becoming marred by gullies and gorges and rendering them useless for tourism activities.

In addition to losing their land, livelihood and possessions, the majority of the rural inhabitants face starvation. The government has taken advantage of the situation by using food aid to canvass the support of the hungry peasants. Consequently, in 2002, the government targeted 267 farms for the controversial land redistribution programme, a step that has disrupted the agricultural sector (Sachikonye, 2005:8), including the tourism industry, because some farms that had been used for safaris were turned into communal settlements. According to the FinGaz (2004), the result of the land reform programme was appalling, because at the end of 2000/2001 farming season, the country needed 593 000 tonnes of maize, 150 000 tonnes of wheat and 11000 tonnes of rice. These matters have had a direct impact on the image of the country as a whole.

5.8.6 General conditions in Zimbabwe

The general economic malaise and the sporadic shortages of fuel, food, and other basic commodities have eroded the confidence that the touring companies in the region and abroad may have had in Zimbabwe (Muleya, 2002:4). There are several issues in Zimbabwe that have contributed towards the negative image that the country has in the source markets. The problems that are cited most in the international media are the prevalence of corruption in government, economic mismanagement, breakdown in the health sector and lack of food security (Mupanga, Jekemu & Ruswa, 1996:3). Lack of food security has resulted in Zimbabwe losing its status of being the bread basket of the region. Consequently, the failure to maintain infrastructure that has a direct impact on accessibility (and also on tourism) and the shortage of foreign currency has affected the procurement of fuel and energy. When there is no fuel, the destination remains inaccessible. The lack of fuel does not only affect tourism, but also all the other industries that are directly associated with it.

Respect for the rule of law in Zimbabwe has been called into question and the government has displayed its disregard of human rights (Sachikonye, 2005:5). There is a lack of adherence to democratic principles as evidenced by the land reform measures, which were implemented on the basis of racial segregation and that disadvantaged and dispossessed the white minority (Pfaffenroth, 2008). These factors could have a negative effect on the push and pull factors.

From the government's perspective, Zimbabwe has remained a safe and peaceful destination with a unique culture, climate and people (Gono, 2008:7). This is not how

prospective tourists perceive the country to be. It is therefore necessary for the country to project an adjusted and desired image to the target market and to continuously manage the destination's brand identity (Moyo, 2000). Most importantly, while things such as the destination's competitiveness, attractions, advertising campaigns and other unique features could act as pull factors for the destination, the image that prospective tourists have of the destination remains the most important factor in determining whether they will ultimately visit the country.

5.8.7 Resource allocation, amenities and activities

In order for the ZTA to fully accomplish its mandate, it should be fully funded, i.e. it should be a leader in destination marketing. The following are the most important weaknesses that have been identified in respect of the ability to market Zimbabwe as a tourist destination: inadequate funding for the ZTA's local and external operations; lack of resources and equipment, including a poor human resources skills base; poor conditions of service for staff, which has led to the failure to attract and retain skilled personnel; a poor corporate image; and a growing apathy on the part of international tour operators towards Zimbabwean products (ZTA, 2005).

There is also a need for a liberal approach to air transport policies in order to make airlines favourably disposed towards tourism in Zimbabwe. Foreign airlines have been either denied access or permitted restricted access for fear that the interest of the national airline may be jeopardized.

In order to increase tourists' length of stay, better provision should be made for the local transport network (ZTA, 2006:29-29). The destination has varied types of

accommodation, which is a major resource that attracts long-staying visitors. Even if the accommodation should vary from facilities for backpackers through budget accommodation to luxurious 5-star exclusiveness (ZTA, 2004:8), the DMO does not have the financial resources to package the destination's equity and sell it to tourists, because it relies on funding from a government grant and on a 2% levy that is paid by the tourism industry.

Amenities constitute the most important resource in a destination (ZTA, 2006:6). They include water, sewage-disposal systems, health facilities and electricity. The provision of power and water in Zimbabwe is problematic (ZTA, 2006:30). Continual power cuts and water shortages have had a negative effect on the image of the destination. In addition, there are no activities that can attract tourists to stay longer in the destination. These weaknesses emanate from the generally poor availability of resources and the limited extent of market research that is undertaken (ZTA, 2006:8).

5.9 LESSONS LEARNT FROM THE ZIMBABWEAN SITUATION

A review of the situation in Zimbabwe has revealed that the ZTA's tourism marketing strategies are inadequate and not as aggressive as they ought to be. There is need to involve the public and private stakeholders within the tourism industry in order to devise new strategies that could give direction to the tourism industry. The sophistication of contemporary travel and leisure consumers requires producers to put them first. Furthermore, the radical transformation of the travel and tourism industry demands continuous innovation in order to remain competitive. In addition, the situation regarding the tourism industry is exacerbated by poor political

leadership that has failed to commit itself to the financial needs of tourism-marketing programmes. While several theories have been posited to explain the downturn in tourism in Zimbabwe, public opinion regards the invasion and redistribution of land to be the cardinal issue in the decline in tourist arrivals.

It has been stated that the image of a destination is affected to a larger extent by word of mouth reports than by any other influence. In order to restore the image of Zimbabwe as a tourist destination, it is essential that a thorough analysis of the situation be undertaken and marketing strategies developed to position the destination well in the international arena and to limit the damage caused by uncontrollable events. However, there is much that the tourist industry itself, and particularly the operators, can do. In a world of anonymity in which operators tend to refer to passengers or guests, by a seat number or a room number, it has been observed that hotel or lodge operators could create a different and welcoming atmosphere by sprucing up the destination's image through the provision of a superior service.

The Zimbabwean case study has revealed the need to create a holistic approach to the holiday experience of the tourists travelling to Zimbabwe. The actions of customs and immigration officers and the attitude of taxi drivers who, meet, greet, transfer and brief the arriving guests, are all key aspects of a holiday experience. All these factors present the essence of the brand. There is a crisis in Israel, Cuba is de-marketed by the USA the world over and South Africa has a greater incidence of muggings than Zimbabwe, but the tourism industry of these countries is booming. While the political issues that are at stake may be entirely different, the fact remains that the strategies

employed by these destinations have managed to limit the damage that political and other related crises could have caused.

A highly branded destination is likely to retain its pull power regardless of the prevailing political scenario. Zimbabwe could boast about the majestic Victoria Falls, but it would take just one reckless and inflammatory statement from the political leadership or a delay on an international forum or airport to ruin the image of the destination. To achieve the best results, Zimbabwe should show the world a realistic picture of itself instead of having the world forming a disparaging image of the country. The interdependence and combinatory nature of tourism products requires that all stakeholders should work together. Divisions among the stakeholders can only result in catastrophic and cataclysmic consequences for the entire destination.

In tourism, political stability is a mere hygiene factor in that it will not in itself necessarily promote tourism, but its absence will certainly destroy or damage the destination's brand image. Numerous case studies have revealed a sharp downturn in tourism arrivals as a result of coup de tat; revolution; political upheaval; war and terrorist activity; a crisis such as the foot-and-mouth disease in the UK; tsunamis and other natural disasters. However, tourist's memories have been shown to be relatively short, with a return to business as usual upon the resumption of normal conditions (Beirman, 2003). This fact should be coupled with a cohesive destination-marketing plan during and after a crisis.

Indeed, Zimbabwe is reeling from the effect of bad publicity that emanates from home and abroad. Such a situation calls for a damage control system to deal with sudden and adverse publicity. Rapid action is needed to lessen the impact of bad

news coverage. The action may consist of telephone calls to opinion makers and renowned travel writers; holding of press conferences; issuing of press releases; and emergency advertising campaigns. Innovation, assertiveness, marketing aggressiveness and re-branding remain the key marketing strategies that could be used to reposition Zimbabwe as a tourist destination.

5.10 SUMMARY

It may be concluded that, in the face of a decline in its tourism performance, Zimbabwe should take stock of what has happened, what is happening and what should happen in future in order to develop multiple goals for recovery. It should develop a unique value proposition that could urge tourists to select the destination instead of its competitors. To achieve this goal, Zimbabwe should develop a database system for profiling visitors and visitor activity packages in order to induce longer stays in the destination. The literature review has revealed that there is need for the ZTA to take a leadership role in providing education for tourism partners and fully co-ordinate the re-branding process. Zimbabwe should ensure consistency in addressing the needs and wants of the tourists in the countries that the destination serves. This approach could assist in the development and fulfilment of the brand promise. Finding and developing undiscovered value interests within the destination could contribute to increasing the destination's product offering.

The next chapter considers the empirical research process applied in this project.