Branding a Region:
the next step for the Regional Tourism Organization of Southern Africa

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Thesis submitted in fulfillment of the requirements for the degree of
Master of Philosophy
(Information and Knowledge Management)

Stellenbosch University

SUPERVISOR: CH Maasdorp

March 2009

DECLARATION

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Date: 23 February 2009

SUMMARY

Marketing practitioners and academics are increasingly applying the concepts and techniques of products or services branding to the branding of destinations. To date, most of these studies focussed on using product and services branding concepts for branding destinations on the level of an individual resort, city or country. This thesis extends this trend by considering to what degree these destination branding ideas can also be used to brand an entire region consisting of several countries with multiple destinations. The specific focus is on developing such a regional branding framework for the tourism industry of the Southern African Development Community (SADC).

First the state of tourism within the SADC region was described, including the establishment of RETOSA and the tourism performance of the region. On the basis of this overview, opportunities for regional destination branding were then considered.

Secondly, the core concepts of product branding and their application to destination branding were discussed. Four theoretical frameworks for branding were reviewed and then used to compare product and destination branding.

Thirdly, the Association of Southeast Asian Nations (ASEAN) was used as a case study of a region that has attempted regional destination branding initiatives, with a view to what the SADC-region may learn from this experience.

In conclusion a regional destination branding framework is proposed for the SADC region. The following list makes up the elements of this framework: *the vision and mission, the destination brand and its proposition, core values of the destination and its brand identity, brand image, clear view of the market, audience and competitors, brand personality, brand positioning, stakeholder consultation process and tourism marketing research.*

Key words: Regional Branding, Destination Branding, Regional Tourism Organisation of Southern Africa

SAMEVATTING

Bemarkingspraktisyns en akademici pas toenemend die konsepte en tegnieke van produk- en dienste-bemarking op die bemarking van destinasies toe. Tot op hede was die focus van die meeste studies om bemarkingskonsepte toe te pas op destinasies soos `n individuele oort, stad of land. Hierdie tesis gaan verder as dit en oorweeg ook on watter mate hierdie bemarkingsidees ook gebruik kan word om `n hele streek, wat uit verskeie lande bestaan, te bemark. Daar word spesifiek gepoog om `n streeksbemarkingsraamwerk vir die toerismebedryf van die Suid-Afrikaanse Ontwikkelingsgemeenskap (SADC) daar te stel.

Eerstens word die stand van toerisme in die SADC-streek beskryf, insluitend die ontwikkeling van SADC en die Streekstoerisme Organisasie van Suider-Afrika (RETOSA). Hierdie oorsig is gebruik om geleenthede vir streeksbemarking te oorweeg.

Tweedens worddie kernkonsepte van produkbemarking en hulle toepassing op streeksbemarking bespreek. Vier teoretiese raamwerke vir bemarking word beskou en gebruik om produk- en destinasie-bemarking te vergelyk.

Derdens word die Assosiasie van Suidoos-Asiatiese Lande (ASEAN) as `n gevallestudie van `n streek wat sulke bemarkingsinisiatiewe reeds geïmplimenteer het, bestudeer om te sien wat SADC daaruit kan leer.

Laastens word `n streeksbemarkingsraamwerk vir die SADC-streek voorgestel. Die elemente waaruit die raamwerk beslaan, sluit die volgende in: *die visie en misie, die streekshandelsmerk en sy proposisie, die kernwaardes van die streek en handelsmerk-identiteit, handelsmerkbeeld, oorsig oor die mark, toeskouers en kompetisie, handelsmerkpersoonlikheid, posisionering, insethouer konsultasieproses en toerisme-marknavorsing.*

Sleutelwoorde: Streeksbemarking, Destinasie-bemarking, Streekstoerisme Organisasie van Suider-Afrika (RETOSA).

KAKARETŠO

Baithuti, bafatišiši le dirutegi tša dikwalakwatšo go tšwa lefaseng ka bophara ba thomile ka bontši go a dima dikgopolo le mekgwa malebana le go kwalakwatša didirišwa gore ba kgone go di somiša a go kwalakwatša dinaga malebana le tša boeti. Go fihlela bjale, dinyakišišo go ba dithuto mabapi le go somiša dikgopolo le mekgwa ya go kwalakwatšwa didirišwa go kwalakwatša tša boeti di lebeletše mafelo a boithabišo, dithoropo le maemo a ka gare ga naga. Lengwalo le la teko ya dithuto le tšwela pele go tšweletša dikgopolo le mekgwa ya dikwalakwatšo le dipapatšo go dinaga tseo ditlabologago tša borwa bja Afrika (SADC) mabapi le indasteri ya boeti. Mokgwa wo wa thuto ya teko o tliša tšebo yeo e nabilego ya dipatišišo ka dingwalwa tšeo di nago le tebelelo yeo e nepagetšego.

Tema ya bobedi ya sengwalwa se e lebeletše boeti ka tikologong ya SADC go tloga go thoma ga SADC, RETOSA, tšomo ya tša boeti ka seleteng malebana le go tšweletša dibaka tša gore selete se se kgone go kwalakwatša tša boeti.

Lengwalo thuto le mo temeng ya boraro e hlološa go tšwelopele go ntša kgodu ya ditšweletšwa mogo le ditekišo le di dikwalakwatšo gape le go mafapa a mane a dithuto tšeo di tiiletšego tsa kgwebo go lebeletšwe dipapang magareng ga dikwalakwatšo ya ditšweletšwa le dibaka tša boeti.

Mokgahlo wa ditšhaba tša selete sa dinaga tsa borwa-botlabela bja Asia (ASEAN) o somišitšwe bjalo ka thuto tego fao selete sa SADC se ka kgonago go ithuta ka maetemogelo a selete seo sa Asia. Thuto ye e tšwela pele go bontsa mekgwa ye o e somiswang go kwalakwatša tsa boeti seleteng sa ASEAN.

Thuto ye e feleletša ka tema ya bohlano, ye o e la e tšang dikgopolo le dikakanyo tšeo selete sa SADC di ka di šomišago mabapi le go kwalakwatšo ya boeti. Dintla tše dilatelang ke di kokwane tše bohlokwa mabapi le go kwalakwatšwa ga selete go tša boeti: *matheo a kgwebo, dikwalakwatšo, makala a kgodu a boleng le botšwalanyo go dikwalakwatšo, dišwantšo tša kwalakwatšo, megopolo yeo e hlwekilego ya mafelo a borekišetšo, babogedi le baphenkgišane, botho bja dikwalakwatšo, maemo a dikwalakwatšo, batšeakarolo bao ba amegago le dipatišišo tša tekišo ya boeti.*

DEDICATIONS AND ACKNOWLEDGEMENTS

This dissertation is dedicated to my family, specifically my dad, *Mpusheng Isaac Manasoe*, my mother, *Machakane Mavis Manasoe* and my grandmother, *Mmamaotšeng Kanyane Lentswana*. Despite your impoverished financial situation you strived to provide a good education to all of us. To my sisters, *Esther (dear departed – May your soul rest in peace), Lizer, Cilia, Sylvia, & Pearl* and to my brothers, *Peter, Jimmy, Richard, Chris, & Costa*, thank you for your support as well as psychological and spiritual motivation.

To my loving and caring wife, *Nomvula Pretty* and God-given off-springs - *Boipelo, Reitumetse Mmanamane, Lethabo Mongatane and Busisiwe Mntubane* as well as my in-laws – *Thwala's Family,* your emotional and spiritual support as well as patience is immensely cherished.

The financial support from my former employer, Mpumalanga Tourism and Parks Agency (MTPA), formely Mpumalanga Tourism Authority (MTA), is exceedingly valued. I wish to further express my sincere appreciation to my mentor, *Mr. Christiaan Maasdorp* for his personal advice, encouragement and academic support during the entire study. *Ms. Mara Visser* from the University of Stellenbosch thanks a lot for your help in locating credible sources, your tireless support and patience.

Messrs Charles Mametja, Phillip Speek (Sepeke), Simon Ramafalo and Mike Gardner as well as *Dr. Mokoko P. Sebola and Ms. Robbin Gardner*, your energy of reading my rough drafts and make constructive comments and inputs are also appreciated.

Finally, I would like to appreciate the spiritual motivation from my Spiritual Fathers, late-Comforter *Rev. FS Modise* and his son, Comforter *Rev. MG Modise*. Your spiritual teachings of ubuntu, humility, love and respect sustained me through the hardships of growing up and till this day.

I DID FOR YOU ALL!

TABLE OF CONTENTS

LIST OF TABLES

LIST OF FIGURES

LIST OF ACRONYMS AND ABBREVIATIONS

ADSL	Asymmetric Digital Subscriber Line
AMA	American Marketing Association
AHHP	ASEAN Hip Hop Pass
AMU	Arab Maghreb Union
AMS	American Marketing Science
ANC	African National Congress
ASEAN	Association of South East Asian Nations
ASEANTA	ASEAN Tourism Association
B2B	Business-to-Business
BCP	Basutoland Congress Party
BDP	Botswana Democratic Party
BPM	Brand Management Personality
CCM	Chama Chamapinduzi
COFAB	Committee on Banking and Finance
COMESA	Common Market for Eastern and Central Africa
COTAC	Committee on Transport and Communication
CRS	Computerised Reservation System
DEAT	Department of Environmental Affairs and Tourism
DMOs	Destination Management Organizations
DRC	Democratic Republic of Congo
ECOWAS	Economic Community for West African States
FEDHASA	Federated Hospitality Association of Southern Africa
FIFA	Fédération Internationale de Football Association
FMCG	Fast Moving Consumer Goods
FRELIMO	Frente De Libertaçäo de Moçambique
GDP	Gross Domestic Product
IT	Information Technology
ITB	Internationale Tourisme Borse
MATTA	Malaysia Association of Tour and Travel Agents
MCP	Malawi Congress Party
MPLA	Movimento Popular de Libertação de Angola
NATAS	National Association of Travel Agents of Singapore Fair

NEPAD	The New Partnership for Africa's Development
NGOs	Non-Government Organisations
NTOs	National Tourism Organizations
OAU	Organisation of African Unity
RECs	Regional Economic Communities
RETOSA	Regional Tourism Organisation of Southern Africa
SADC	Southern African Development Community
SADCC	Southern African Development Coordinating Conference
SATSSA	Southern Africa Tourism Services
SCOT	Sub-Committee on Tourism
SCUS	Secretariat, Commissions and Sector Coordinating Units
SPA	SADC Programme of Action
sq km	Square kilometres
STB	Singapore Tourists Board
SWAPO	South West Africa People's Organisation
TACY	Thailand Arts and Craft Year
TCU	Tourism Coordinating Unit
TDCA	Tourists Destination Competitiveness and Attractiveness
TIME	Tourism Indonesia Mart and Expo
TTRA	Travel and Tourism Research Association
TV	Television
TVC	ASEAN TV Commercials
UNIP	United National Independence Party
USA	United States of America
USP	Unique Selling Proposition
VAC	Visit ASEAN Campaign
VAP	Visit ASEAN Pass
WTM	World Travel Market
UNWTO	World Tourism Organization
WTTC	World Travel and Tourism Council
WWW	World Wide Web
ZANU-PF	Zimbabwe African National Union

CHAPTER 1

INTRODUCTION AND BACKGROUND

This chapter gives the background and motivation of the study as well as outlining the challenges and opportunities facing Southern African Development Community's (SADC) tourism sector. The chapter also defines the key terms, study aims and objectives, and gives an overview of the research methodology used. The structure of the entire report or thesis is presented at the end of the chapter.

1.1. BACKGROUND AND MOTIVATION

These days it is practically impossible to turn on a television (TV) or radio or open a paper without seeing some kind of branding (Beerli and Martin, 2004) as well as destination branding advertisement either at a resort, town, province or country level. Gilmore (2002) shows that branding is an age old symbol of communication and it is at least as old as Christianity in the Western world. Brands as we think of them today are not a product of the twentieth century but the result of the industrial revolution and the transformation from an agrarian and rural society to a westernised industrial and urban one (Gilmore, 2002). But branding in those years was not necessarily involved only with slogans, clever names, advertising and publicity, as is seen today, although these tools may be useful (Gilmore, 2002). In those formative years, the focus of branding was mainly on products and services. Most of the literature by then focused mainly on the branding of consumer goods and grocery products (Morgan and Pritchard, 1999).

The unprecedented growth[1] in the tourism[2] industry during the last fifty years has created major challenges in tourism marketing (Echtner and Ritchie, 2003). The contribution of tourism to the economies of most countries surpassed the contribution of primary sectors such as mining and agriculture. As a result, governments are increasingly recognising the

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[1]   Global international tourism arrivals grew from *25.3 million to 898 million* and international tourism receipts grew from *US$2.1 billion to US$682.7* between 1950 and 2006, respectively (World Tourism Organisation - Tourism Highlights 2007)

[2]   Tourism is defined as the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited (World Tourism Organisation, 2001)

economic significance of tourism and its role as a tool for regional development (Wanmill, 1999). One consequence of this has been the active development and promotion of towns, regions and countries as if they were tourism place products (Kotler, Haider and Rein, 1993). As more and more countries around the world started to develop their tourism industries, destination choices available to consumers continued to expand. Every country started to develop top class hotels, resorts and attractions, and claim unique cultures and heritage. Each place describes itself as having the friendliest people and the most customer-focused tourism industry (Morgan, Pritchard and Piggot, 2002). As a result, tourism marketers are faced with influencing consumer decision in an increasingly complex and competitive global market place (Echtner *et al*, 2003). Since tourists are spoilt for choice of available destinations, it has become more important for destinations to develop a destination brand (Pike, 2005).

Given the above, destinations started to develop their own brands in order to differentiate themselves from other destinations. Branding is viewed as the most powerful tool available to contemporary destination marketers confronted by increasing product parity, substitutability and competition (Morgan *et al*, 2002). Morgan *et al* (2002) further assert that the battle for customers in tomorrow's destination market place will be fought not over price but over the hearts and minds – in the territory of brands. As a result most countries started to develop their own brands, mainly at city, region and country level, in order to attract more tourists from their competing destinations.

The research in destination branding is relatively new. In support of this statement, Pike (2005) indicates that destination branding literature only surfaced relatively recently, with the first academic conference session[3] being convened in 1997, the first journal articles appearing in the 1990s and the first book published in 2002 (first edition) and 2004 (second edition)[4]. This shows that the concept of branding destinations has received little attention to date (Tasci and Kozak, 2006 and Hem and Iversen, 2004). In empirical studies, to date, branding in the tourists' context is usually conceptualised at smaller levels, namely at resort levels (Tasci *et al*, 2006), city, region and country level.

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[3] The American Marketing Science (AMS) Conference, held at Miami, USA , 1997 and was followed by the 29th Annual Research Conference of the Travel and Tourism Research (TTR) Conference held at Ft. Worth, Texas, 7 – 10 June 1998

[4] Morgan N, Pritchard A, Pride R. 2002. Destination Branding: Creating a Unique Destination Proposition and [4] Morgan N, Pritchard A, Pride R. 2004. Destination Branding: Creating a Unique Destination Proposition. 2nd

Literature does not show any destination branding researchers who have investigated the destination branding possibilities of regional groupings. Trading blocs and regional groupings are an integral part for the future political and economic development and are increasing in their importance within the developing world of Africa, Asia and South America Gondalves and Jetly (1999). Gondalves *et al* (1999) indicate that the need for global institutions to sort out clashes and national interests had been recognized since 1918. They further indicated that regional cooperation, as the way to reduce and eliminate tensions, was first identified by the far-sighted statesmen of Europe and South-East Asia.

This concept has been applied since the 1950s across the globe and to date there are more than thirty regional economic blocs across the World. Africa alone has five regional economic blocs, namely Arab Maghreb Union (AMU), Economic Community of Central African States (ECCAS), Common Market for Eastern and Central Africa (COMESA), Southern African Development Community (SADC) and Economic Community of West African States (ECOWAS). This indicates that the issue of regional economic integration is not new or unique to Southern Africa.

This study focuses attention on the development of a regional destination branding framework for the SADC region. The SADC was established in 1992 and to date it has fifteen Member States. The region is located in the southern tip of Africa (see figure 2.1 in chapter 2). It is approximately 9.23 million square kilometres territorial area in size and with an estimated population of 186 million (est. July 2006). The size of the region's economy is estimated (2005) at US$ 178 billion. The region's location with respect to the other regions within Africa and other parts of the world is shown in figure 2.1. The Indian Ocean borders it from the east and the Atlantic Ocean from the west.

In 2005, the SADC region recorded 15.1 million tourist[5] arrivals as compared to 12.2 million in the previous year. South Africa recorded the highest number of arrivals, followed by

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[5] Tourists are persons who do not reside in the country of arrival and are admitted to that country under tourist visas (if required) for purposes of leisure, recreation, holiday, visits to friends or relatives, health or medical treatment, or religious pilgrimage. They must spend at least a night in a collective or private accommodation in the receiving country and their duration of stay must not surpass 12 months (World Tourism Organisation)

Zimbabwe, Botswana, and Namibia. This accounted for 1.95% of the global arrivals and a growth of 24% in terms of regional arrivals. In 2001, SADC recorded US$5.4 billion tourism receipts, with more than half of the receipts received by South Africa and other countries in the same period was as follows: Tanzania (22%), Mauritius (12%), Namibia (5.8%) and Botswana (5%) (United Nations World Tourism Organisation (UNWTO), 2002).

The importance of regional or Southern tourism appears especially evident when it is compared to the number of tourists coming from developed countries. For example, UNWTO) data suggests that in 1998 within ASEAN and SADC blocs tourists comprised of 39 and 23 per cent respectively (Ghimire, 2001). Ghimire (2003) further asserts that tourism is recognized as a vital element in regional economic and cooperation.

It is submitted that it is only by recognising the role of regionalism that more efficient global institutions can be brought into being. Trading blocs and regional groupings are an integral part of the future order and are increasing in importance (Gonsalves *et al*, 1999).

The SADC region in this study refers to the fifteen countries of Southern Africa, which includes South Africa, Lesotho, Swaziland, Mozambique, Botswana, Zimbabwe, Namibia, Malawi, Zambia, Angola, Tanzania, Democratic Republic of Congo (DRC), Seychelles, Madagascar and Mauritius. All these countries, in one way or the other, separately branded their destinations. Most of the countries have destination marketing organisations (DMOs) which market and promote their own destination, and eventually compete against each other.

The region has shown its willingness to cooperate in developing a powerful tourism destination brand. This is evident through the promulgation of a Protocol on the Development of Tourism in the Southern African Development Community in 1998, and followed by the establishment of the Regional Tourism Organisation of Southern African (RETOSA) after the Charter of its establishment was passed in 2002. The activities and programmes of RETOSA are fully discussed in chapter 2.

The SADC region as part of the developing world is considered to have a "comparative advantage" vis-à-vis the industrialised world as they possess exceptional tourist resources and attractions, such as warm and sunny weather, attractive beaches, unique wildlife and tropical forests and exotic or authentic cultures (Chimire, 2001). The World Tourism

Organisations' (UNWTO) Tourism 2020 Vision forecasting study concludes that opportunities abound and the potential is strong for the Southern and Eastern African regions in which SADC countries are located (UNWTO, 2000).

The regional destination branding is the focus of this study for the following reasons, where attractions are shared with the neighbouring countries (The Victoria Falls; Zambezi River and wildlife reserves), joint or regional promotion and marketing can be effective (Christie, 2001), William, Gill & Chura (2004) profess that branding in tourism is increasingly due to global or cross-border partnerships for accessing scarce resources and the opportunities for larger and more cooperative positioning of the destinations in the market place (William, Gill and Chura, 2004), and when cross-border regions are permitted and encouraged to cooperate in tourism promotion, the global competitive advantage is likely to increase (Timothy, 2003).

Many countries and regions invest high proportions of their resources in developing and promotion of tourism. Below are the main reasons why most countries or regions choose in favour of tourism: tourism is an important industry providing substantial foreign exchange receipts and employment opportunities, tourism is recognised as a vital element in regional economic cooperation (Ghimire, 2001), and tourism generally faces fewer constraints in the form of market protectionism than is the case with other sectors, such as manufacturing, and mining, tourism also faces fewer of the environmental and infrastructural constraints which have restricted the pace of agricultural development, and helps countries or regions to spread economic activity into areas previously marginalised economically, and spatially peripheral/ economically backward or depressed areas and tourism is vitally important as a source of foreign exchange and also as a factor in the location of industry and in the development of areas that are poor in natural resources (Soipee, See and Jin, undated).

1.2. DEFINITION OF KEY CONCEPTS

For the purpose of this study definitions are used to ensure that the meanings of the concepts used are fully and commonly understood. The following important concepts are used frequently in this study and are defined as follows:

- **Branding**

Branding is defined as, at a product or service level, as a process of creating a slogan from a message and then designing a symbol or logo that together within the slogan will communicate to potential customers the image of the products or services along with its features, benefits and the values it offers (Kolb, 2006).

- **Region**

Region in this study refers to the SADC, which is comprised of the fourteen (15) Member States, namely South Africa, Lesotho, Swaziland, Mozambique, Botswana, Zimbabwe, Namibia, Malawi, Zambia, Angola, Tanzania, Democratic Republic of Congo (DRC), Madagascar, Mauritius and Seychelles[6].

- **Regional Tourism Organisation of Southern Africa (RETOSA)**

RETOSA refers to the SADC's tourism organisation established in terms of the Charter of Regional Tourism Organisations of Southern Africa of 2002.

- **Destination**

Destination is defined as a place towards which people travel and where they choose to stay for a while in order to experience certain features and characteristics – a perceived attraction of some sort (Leiper, 1995), or is a focus of facilities and services designed to meet the needs of tourists (Gilbert, Shepherd and Wanhill, 1998).

- **Destination Branding**

Destination Branding is defined as the process of combining all the attributes associated with a place (i.e. its products and services from various industries such as agriculture, tourism, sports, arts, investment, and technology education) under one concept, which expresses a

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[6] Seychelles rejoined SADC on the 5th September 2008 after she withdrew her membership in July 2004 due to financial and human resources constraints

unique identity and personality of the destination and differentiates it from its competitors (Kaplanidou & Vogt, 2003).

- **Tourism**

Tourism is defined as the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited (World Tourism Organisation, 2001).

1.3.   PROBLEM STATEMENT

In the past decades, an increasing amount of research has examined the area of branding with a strong focus on consumer goods and grocery products (Aaker, 1997; Aaker, 2002; Aaker and Joachimsthaler, 2000; de Chernatony, 2001; Keller, 1998 and Kapferer, 1997). Similarly, the application of branding to tourism has also been recently and widely explored by tourism scholars (Cai, 2002; Morgan *et al*, 2003, Kavaratzis and Ashworth, 2005 and Hosany, Yuksel & Uysal, 2006), but most are confined to tourism products in spite of the multi-dimensional nature of tourism destination branding (Cai, 2002 and Hosany *et al*, 2006). Although the concept of destination branding widely explored by tourism scholars remains narrowly defined to many practitioners within the DMOs and is not well represented in tourism literature (Blain, Levy and Ritchie, 2005).

Christie and Crompton (2001) assert that given its cross-sectoral nature, tourism can only grow sustainably if it is integrated into the country's overall economic, social and physical planning policies. They further assert that where national attractions are shared with neighbouring countries, joint regional promotion and marketing can be effective.

Research shows today's consumers, facilitated by increased leisure time, rising levels of disposable income and more effective transportation networks, have the means to make a choice from amongst this much larger variety of destinations (Echtner *et al*, 2003) and research further shows most of the tourists visit more than one country during one holiday (Anholt, 2002). The western consumer is attracted as never before by the cultures and the products of distant lands, as a handful of examples such as Shanghai Tang and Urvashi, the

Indian perfume, are beginning to prove. Even though, as shown above, numerous and intensive studies have already been undertaken to determine the destination branding frameworks for products and services, states, regions and countries (Gilmore, 2002). However, to date, there has been no effort to research the possibility of developing a regional destination branding framework.

This study therefore aims to use the literature review on product and destination branding as well as lessons learnt from the Association of Southeast Asian Nations (ASEAN) region to propose a regional destination branding framework for the SADC region.

In order to address the problem, the following research questions will be addressed in the study:

- Are SADC's Member States willing to cooperate for the joint promotion of the region?
- What are the differences and similarities in branding destinations as well as branding of products or services?
- What are the benefits and challenges of branding tourism destinations?
- What are the requirements for the development of an effective regional destination branding framework?

1.4. RESEARCH AIM AND OBJECTIVES

The overall aim of this study is to propose a regional destination branding framework for the Southern African Development Community (SADC).

To achieve the overall aim of the study, the following objectives are proposed:

1.4.1.   To assess SADC's tourism policies and strategies as well as her tourism performance and regional destination branding opportunities with a view of developing a single tourism brand for the region (Chapter 2),

1.4.2.   To assess as whether SADC's Member States are willing to cooperate for the joint promotion of the region as a tourism destination (Chapter 2)

1.4.3. To establish whether there are differences or similarities in the branding of a product or service and tourism destination as well as identifying key elements of each and challenges of building these brands (Chapter 3),

1.4.4. To examine and identify possible regional destination branding lessons that could be learnt from the ASEAN region and the ASEAN Tourism Association (ASEANTA) (Chapter 4),

1.4.5. To suggest a regional destination branding framework, which offers practical guidelines for development of a regional destination branding for the SADC region (Chapter 5), and

1.4.6. To share the findings and recommendations with SADC and RETOSA.

1.5.   RESEARCH METHODOLOGY

The study has made use of a qualitative research method which involved the use of a literature review approach. Different secondary literature on products or services branding and destination branding was examined.   The purpose of the literature review was to find answers to the questions raised under the research problem.   In this study, two types of literature sources were used, that is: *Concept literature* - This refers to books and articles by experts where they express their opinions, experiences, theories and ideas about what is good or bad, desirable or undesirable, valuable or of no value, in connection with the comprehension of specific concepts and constructs. This will contribute to a much better understanding of the validity or correctness of theories. Concept literature also illuminates specific strong points, which the researcher can follow up (Strauss and Myburgh, 2000) and *Researcher literature* - This involves reporting in respect of research which has been undertaken previously in this specific field (and has made a noticeable impact) and gives the researcher a good indication of successes and bottlenecks in respect of research, design, hypotheses, techniques and instruments in connection with the field (Strauss *et al*, 2000).

The concept literature mainly included books, and the researcher's literature included published and unpublished articles such as journal articles, conference papers, internet documents and dissertations. The following criteria was used to choose the sources of information : *language* (If the source is in a language that is not understood, it will not be used), *date of edition* (Only recent sources will be utilized), *author* (Sources written by well-

known authors (authorities) rather than sources written by lesser-known authors will be preferred) and *content* (Even if the title of a source is in accordance with the topic, the content page or annotation will be read to see whether the chapters deal with the research problem).

The SADC region's tourism sector performance as well as her tourism policies and strategies were analysed. An analysis of how the ASEAN region is as far as regional destination branding is concerned was made. The aim of this approach was to learn from the ASEAN region's experience in developing a regional destination brand and recommend ways of improving on their failures while learning from their good work.

Finally, the analysis of findings from the literature review and lessons learned from the ASEAN region were used in an effort to suggest a regional destination branding framework for the SADC region. The chapter (chapter 5) containing a summary, conclusion and recommendation will highlight those lessons learned from the literature review and the ASEAN region. Those elements worth talking to the next step and adapted in order to ensure an effective regional destination branding framework were fully interrogated. These elements of products were chosen from theoretical models outlined in chapter 3 based on their importance to branding. Careful consideration of the contents of these elements was considered to ensure that conclusions drawn will be valid.

1.6. STRUCTURE OF THE THESIS

This study is composed of five chapters lined up as follows:

Chapter 1 - *Introduction and background*, contains a general introduction & theoretical background of the study. The study aims and objectives, problem statement and research methodology are outlined and key concepts are also defined in this chapter.

In the second chapter – *Tourism in the Southern African Development Community (SADC) & Regional Tourism Organisation of Southern Africa (RETOSA)*, a literature review of the establishment, vision and mission and physical characteristics of SADC; SADC's tourism

policies, strategies and objectives; economic significance of the tourism industry to the region; and SADC's destination branding opportunities are outlined and also discussed.

The third chapter – *An overview of Destination Branding*, outlines a theoretical review of branding as well as a comprehensive analysis and definition of the term destination and destination branding. The chapter further analyses the major elements of destination branding as well as the theoretical destination branding frameworks. The challenges, role and tools for building both product and destination branding are also outlined. The chapter further outlines the differences and similarities between product and destination branding. Lastly, the challenges and benefits of building a regional destination brand are outlined.

Chapter 4 – *Association of Southeast Asian Nations (ASEAN) and ASEAN Tourism Association (ASEANTA) – Possible Lessons for SADC!,* outlines regional branding initiatives of the ASEAN region that the SADC region could learn from. This will be followed up by the analysis of the tourism performance of the region since the region began to market herself as a single destination. The reasons why the ASEAN region was chosen as a case study is outlined in this chapter. This will serve as a critical input to the regional destination branding framework to be proposed for the SADC region.

Chapter 5 – *Formulating a Regional Destination Branding Framework,* outlines a framework proposed for the SADC's regional destination branding initiative. This chapter also provides a synthesis of the key findings of the preceding chapters and also provides an overall conclusions and recommendations of this study. It is followed by a comprehensive list of reference material/ bibliography.

CHAPTER 2

TOURISM IN THE SOUTHERN AFRICAN DEVELOPMENT COMMUNITY

AND REGIONAL TOURISM ORGANISATION OF SOUTHERN AFRICA

2.1. INTRODUCTION

Trading blocs and regional groupings are an integral part of future political and economic development and are increasing in their importance within the developing world of Africa, Asia and South America. Gondalves *et al* (1999) indicate that the need for global institutions to sort out clashes and national interests had been recognised since 1918. They further indicated that regional cooperation, as the way to reduce and eliminate tensions, was first identified by the far-sighted statesmen of Europe and South-East Asia.

This concept has been applied since the 1950s across the globe and to date there are more than thirty regional economic blocs across the World. Africa alone has five regional economic blocs, namely AMU, ECCAS, COMESA, SADC and ECOWAS. This indicates that the issue of regional economic integration is not new or unique to Southern Africa.

In this chapter the first objective of the study as stated in section 1.4.1 of chapter 1 is critically assessed. The SADC region's establishment, vision, mission and physical characteristics of the region are outlined. The chapter further outlines the region's tourism policies and strategies, and the economic significance of the tourism sector to the region's economy. The chapter further outlines RETOSA's activities originating from the Charter for the Establishment of RETOSA. The chapter also looks at the opportunities available to enhance the development of regional destination brand for the region.

2.2. THE SOUTH AFRICAN DEVELOPMENT COMMUNITY: ESTABLISHMENT, VISION AND MISSION.

This section outlines the historical establishment of the Southern African Development Community as well as her vision and mission statements.

2.2.1. THE ESTABLISHMENT OF SOUTHERN AFRICAN DEVELOPMENT COMMUNITY (SADC)

The SADC region is one of the five regional economic blocs in Africa. According to SADC (2003), regional co-operation and integration in Southern Africa owes its origin to historical, economic, political, social and cultural factors that have created strong bonds of solidarity and unity among the peoples of Southern Africa. These factors have contributed to the formation of a distinct Southern African personality and identity that underpins political and economic co-operation. The SADC region is a successor of the Southern African Development Coordinating Council (SADCC) established in 1975 by the Frontline States[7] with a view to promote regional cooperation and integration with the region. Since then the Frontline States jointly began to co-ordinate efforts, resources and strategies, with regard to the National Liberation Movements[8] of Southern Africa that were fighting against colonialism, racism and white minority rule. The founding Member States of the SADCC were nine majority-ruled states of Southern Africa – Angola, Botswana, Lesotho, Malawi, Mozambique, Swaziland, Tanzania, Zambia and Zimbabwe. This shows that the initial engagements of the Frontline States were based purely on political motives.

Later, this initiative was extended to address the mass poverty, economic backwardness and the threat of powerful and hostile white minority-ruled neighbours (mainly South Africa). Thus, the leaders saw the promotion of economic and social development through co-operation and integration as the next logical step after political independence.

The original association of the Frontline States was based on loose association and not on a legally binding arrangement. As a result, by the late 1980s it became apparent that SADCC need strengthening (SADC, 2003). Due to the development at global and continental level, in August 1992 the Head of States and Governments signed a Treaty to transform the "SADCC" from a Coordination Conference into a Community (Southern African

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[7] The frontline states are the countries of Angola, Botswana, Mozambique, Tanzania and Zambia (SADC, 2002)

[8] For example Chama Chamapinduzi (CCM) in Tanzania, Botswana Democratic Party (BDP) and Basutoland Congress Party (BCP) in Botswana, South West Africa People's Organisation (SWAPO) in Namibia, Frente de Libertação de Moçambique (FRELIMO) in Mozambique, African National Congress (ANC) in South Africa, Movimento Popular de Libertação de Angola (MPLA) in Angola, the Zimbabwe African National Union (ZANU-PF) in Zimbabwe, Malawi Congress Party (MCP) in Malawi and United National Independence Party (UNIP) in Zambia (Olaleye, 2003)

Development Community) and the basis of cooperation among Member States were redefined from a loose association into a legally binding arrangement.

The purpose of transforming SADCC into SADC was to promote deeper economic cooperation and integration in order to help address many of the factors that make it difficult to sustain economic growth and socio-economic development, such as continued dependence on the exports of a few primary commodities. It had become an urgent necessity for SADC governments to urgently transform and restructure their economies. The small size of their individual markets, the inadequate socio-economic infrastructure and the high per capita cost of providing this infrastructure as well as their low income base made it difficult for them individually to attract or maintain the necessary investments for their sustained development (SADC, 2003).

In the 1990s, the membership of the organisation increased to 15 with the accession of Namibia (1990), South Africa (1994), Mauritius (1995), Seychelles (1997 and rejoined during September 2008) and the Democratic Republic of Congo (1997). Since its inception, SADC has inculcated a sense of regional belonging as well as a tradition of consultation among the peoples and governments of Southern Africa, which, among other things, has improved regional security (SADC, 2003). It has also formulated the SADC Programme of Action (SPA), which covers cooperation in several economic and social sectors; and implemented several infrastructure and other projects. Furthermore, the SADC region has developed protocols in a number of areas of co-operation, which provide the legal framework for co-operation among Member States.

While the SADC region has recorded some remarkable achievements, difficulties and constraints have also been encountered. These include lack of institutional reforms for effective transformation from SADCC into SADC; lack of synergy between the objectives of the Treaty on the one hand and the existing SPA and institutional framework on the other; and finally lack of appropriate mechanisms capable of translating the high degree of political commitment into concrete programmes of community building and integration.

On the African continent, efforts continued, mainly under the auspices of the Organisation of African Unity (OAU) to promote closer economic relations. In 1991, some of the OAU Heads of State or Government signed the Treaty establishing the African Economic

Community. Like the 1980 Lagos Plan of Action, the Treaty made Regional Economic Communities (RECs) the building blocks for the continental community. In light of this development, the SADC Heads of State or Government viewed their efforts at Regional integration in Southern Africa as part of this continental effort. More recently, the African Union, the successor to the OAU, has reaffirmed its commitment to the African Economic Community. The New Partnership for Africa's Development (NEPAD) has designated RECs as implementing agencies for its programme.

On the global scene, fundamental and far-reaching political and economic changes were taking place. The cold war had ended, and world affairs were increasingly being managed on the basis of consultation and consensus, rather than confrontation and competition. Integration was fast becoming a global trend. Countries in different regions of the globe were organising themselves into closer economic and political entities. These movements towards stronger regional blocs were expected to transform the world, both economically and politically, as corporates, companies and private enterprise within these economic blocs would benefit from economies of scale provided by large markets, to become competitive both internally and internationally. For corporates in Southern Africa not to remain behind, it became imperative for a large regional market to be established so that they too could benefit from economies of scale (SADC, 2003).

2.2.2. THE SADC's VISION

The vision of SADC was developed as results of the Declaration "*Towards the Southern African Development Community*", adopted on the 17th August 1992, which indicated that all countries and people of Southern Africa should develop a vision of a shared future, a future within a regional community.

The SADC vision is "*a common future, a future in a regional community that will ensure economic well-being, improvement of the standards of living and quality of life, freedom and social justice and peace and security for the peoples of Southern Africa. This shared vision is anchored on the common values and principles and the historical and cultural affinities that exist between the peoples of Southern Africa*".

15

2.2.3. THE SADC's MISSION

The SADC Mission Statement is: *"To promote sustainable and equitable economic growth and socio-economic development through efficient productive systems, deeper co-operation and integration, good governance, and durable peace and security, so that the region emerges as a competitive and effective player in international relations and the world economy".*

The pursuit of this mission is guided by the following principles, which are stated in Article 4 of the SADC Treaty: Sovereign equality of all Member States; solidarity, peace and security; human rights, democracy, and the rule of law, equity, balance and mutual benefit and peaceful settlement of disputes.

2.3.   PHYSICAL CHARACTERISTICS OF THE STUDY AREA

The SADC region is located in the southern tip of Africa (see figure 2.1.). It is approximately 9.23 million square kilometres (sq km) territorial area in size and with an estimated population of 186 million (SADC - est. July 2006). The size of the region's economy is estimated (2005) at US$ 178 billion (SADC). The region's location with respect to the other regions within Africa and other parts of the world is shown in figure 2.1. The Indian Ocean borders her from the east and the Atlantic Ocean from the west.

The DRC is the biggest country with a land area of almost 2.3 million square kilometres and the smallest country within the region is Seychelles.   To date the region has 15 Member States which includes the DRC, Angola, Namibia, Tanzania, Seychelles, Malawi, Zambia, Mozambique, Zimbabwe, Botswana, South Africa, Swaziland, Lesotho, Mauritius and Madagascar. The 15 Member States of SADC differ in terms of the land mass, population size, and the level of economic and social development (Dieke, 2000). Furthermore, these countries have had different colonial experiences, which had different consequences for the region, at least in tourism cooperation terms. The region has a well developed tourism sector. Amongst others it boasts almost seventeen transfrontier conservation areas (TFCA – defined and outlined later in the chapter), rich history and heritage, culture, and scenic beauty. The figure 2.1 shows SADC's Member States and their locations with region. The Republic of

South Africa is located in the southern-most tip and the most northern part of region is the DRC.

Figure 2.1: Map of the SADC region showing her member states excluding Seychelles
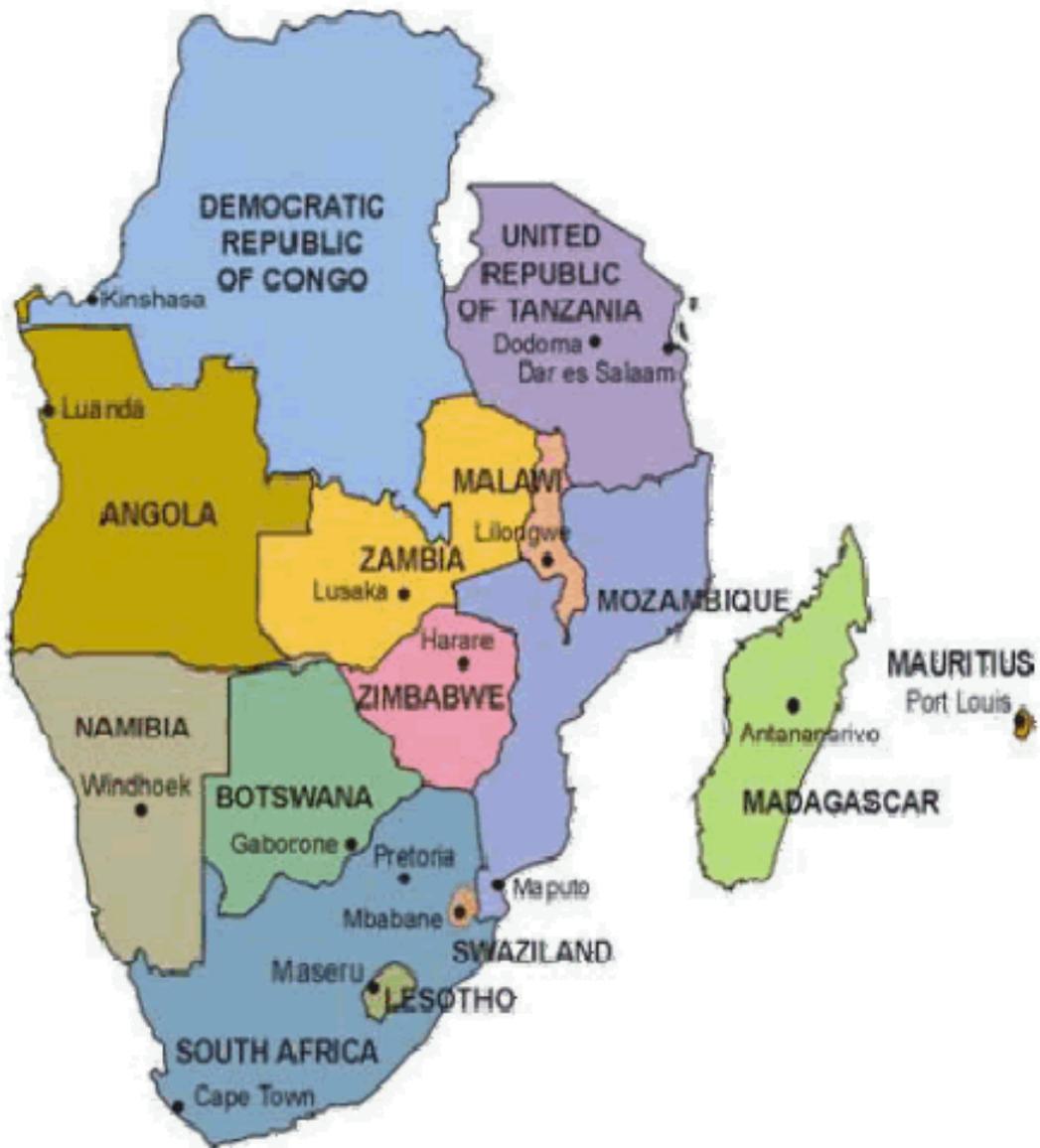
(Source: SADC, 2008)

2.4. TOURISM WITHIN THE SOUTHERN AFRICAN DEVELOPMENT COMMUNITY

The SADC region's tourism policies, strategies and objective, RETOSA as well as the economic significance of tourism within the region are discussed in this section.

2.4.1. SADC'S TOURISM POLICIES, STRATEGIES AND OBJECTIVES

The importance of tourism for national and regional development within the SADC region was further emphasised when it gained a distinct and independent position within the main organisational framework of region. To further demonstrate the importance of the tourism sector, the SADC region developed objectives, policies and strategies which guide the region's tourism initiatives. The region's overall goal of the tourism sector is to develop, promote and market the region as a single, but multifaceted tourism destination; and to improve the quality, competitiveness and standards of service of the tourism industry (SADC, 2003).

In pursuit of the overall goal of the tourism sector, the region developed a Protocol on Development of Tourism (Protocol) in 1998 (SADC, 2003). The Protocol became the only legal policy instrument for the region's tourism sector. The Protocol has been ratified and came into force on 26 November 2002, and most of its programmes are being implemented.
The Protocol provides a policy framework for tourism development, is generally in line with the region's objectives, as enumerated in the SADC Treaty as well as the strategic objectives and SADC's Common Agenda stated in the report on the "Review of Operations of SADC Institutions". The objectives of the Protocol are : to use tourism as a vehicle to achieve sustainable social and economic development through the full realisation of its potential for the region; ensure equitable, balanced and complimentary development of the tourism industry region wide; optimise resource usage and increase the competitive advantage of the region vis-à-vis other destinations through collective efforts and co-operation in an environmentally sustainable manner; ensure the involvement of small and micro-enterprises, local communities, women and youth in the development of tourism throughout the region; contribute towards the human resources development of the region through job creation and the development of skills at all levels of the tourism industry; create a favourable investment climate for tourism within the region for both the public and private sectors, including small

and medium scale tourism establishments; improve the quality, competitiveness and standards of service of the tourism industry in the region; improve the standards of safety and security for tourists in the territories of Member States and to make appropriate provision for disabled, handicapped, and senior citizens in their respective countries; aggressively promote the region as a single but multifaceted tourism destination capitalizing on its common strengths and highlighting individual member state's unique tourist attractions, facilitate intra-regional travel for the development of tourism through easing or removal of travel and visa restrictions and harmonization of immigration procedures; improve tourism service and infrastructure in order to foster a vibrant tourism industry.

In terms of the Protocol the SADC Member States are expected to integrate the following areas of tourism – travel facilitation, tourism training and education, marketing and promotion, tourism research and statistics, service standards, transportation, environmentally sustainable tourism and investment. The institutional mechanisms for the implementation of this Protocol were established. These institutional mechanisms comprise of SADC Summit, The Committee of Tourism Ministers, Committee of Senior Officials, Tourism Coordinating Unit and RETOSA (SADC, 2003). The purpose of this chapter as well as the whole document is to focus or emphasize the marketing and promotion area of integration which is primarily performed by RETOSA. Therefore, this study will only focus on the activities of RETOSA.

SADC's Member States also developed their own tourism policies, in line with the Protocol, with a view of integrating their plans to the region as well as address tourism issues in their own countries. The tourism policies of SADC's Member States include White Paper on the Development and Promotion of Tourism in 1996 and Tourism Second Amendment Act no 70 of 2000 (South Africa) and Botswana Tourism Act, 1992; Botswana Tourism Regulations, 1996; Botswana Tourism Master Plan (2000), the Botswana National Ecotourism Strategy (2002) (Botswana).

2.4.2. REGIONAL TOURISM ORGANISATION OF SOUTHERN AFRICA (RETOSA)

One of the provisions of the protocol is the setting up of a regional body to market the SADC region as a collective tourism destination, thus Regional Tourism Organisation of Southern Africa (RETOSA) was established in 1998. RETOSA's activities are governed by a Charter[9]. According to the Charter, RETOSA's mandate is to coordinate the marketing and promotion of Southern Africa (Dieke, 2000). The objectives of RETOSA as outlined in the Charter are to facilitate, encourage and assist in the development of legal, and ethical tourism throughout the region, taking due consideration of the overall development of the people, the region and the region's natural and cultural resources. In terms of the Charter, the specific objectives of RETOSA are as follows: encourage and facilitate the movement and flow of tourists into the region; applying the necessary regional and national policies and mechanisms, which facilitate the liberalisation of exchange control regulations; facilitate a community and rural-based tourism industry and culture throughout the region; develop, coordinate and facilitate tourism marketing and related promotional opportunities into the region by whatever means, including internal and external collaboration; mutual marketing programmes and utilisation of legitimate methods focusing on the region's quality, as a desirable and safe tourist destination and investment target; encourage and facilitate international and regional transport, tourism training and accommodation classification, encourage and promote consistency in the quality and maintenance of tourism standards within the region; and act as a communication channel between Member States in order to enhance the region's tourism and tourist confluence.

Dieke (2000) indicates that a weak regional marketing and promotional base and lack of regional identity in the markets, a narrow product base, over dependency on a few markets, over-exploitation of key sources, inadequate infrastructure, cumbersome immigration and custom regulations, inadequate human resources, and cumbersome investment policies, are the main reasons why the SADC countries adopted a regional approach to tourism.

Figure 2.2 shows the region's organisational structure for the tourism sector with distinct areas of responsibility and relationship. For the context of this chapter as well as the focus of this research, there are two aspects of the structure that are of interest. They are the tourism coordinating unit (TCU) and RETOSA. TCU is responsible for the overall coordination of tourism development policy for the region. This means that the TCU is responsible for

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[9] Charter of the Regional Tourism Organisation of Southern Africa (SADC, 2002).

interfacing with all Member States in the region with a view to streamlining all policy matters that directly or indirectly affect tourism within the region. Other areas of its responsibility are visa issues, cross-border matters pertaining to the movement of tourist vehicles, and the security of tourists.

On the other hand, RETOSA is SADC's marketing and promotion arm and has its headquarters in Johannesburg (JHB), South Africa. The board of directors of RETOSA is made up of two members from each country, one representing the private sector and the other representing the public sector.

Figure 2.2: Position of RETOSA in the SADC Structure
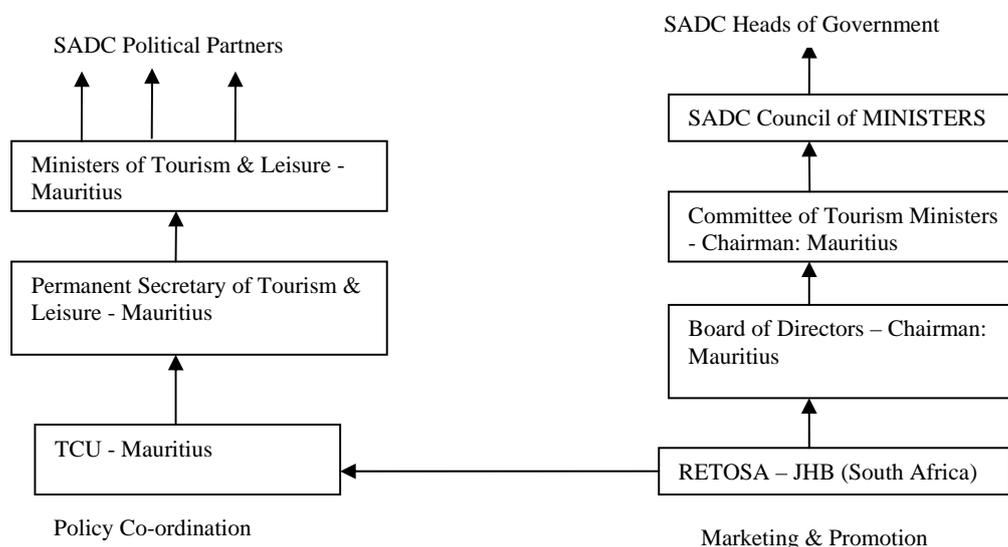
(Source: Dieke, 2000)

RETOSA's membership constitutes private (national, provincial and local) sector organisations, public sector (national, provincial and local) tourism organisations, regional and international tour operators and tourism establishments and services (RETOSA, 1998). In addition RETOSA (1998) indicates that RETOSA has three membership categories, full membership – comprising registered and nationally recognised private sector umbrella organisations (Federated Hospitality Association of Southern Africa – FEDHSA and Southern African Tourism Services - SATSA), and national public sector tourism authorities operating in Member States. Associate Membership – comprises of fee-paying members accredited in SADC Countries, namely private sector, public sector, or any other organization

21

primarily involved in tourism in Member States, and Affiliate Membership – comprises fee paying Members registered and operating in non-SADC countries. These membership categories have different annual fee payment structures and well as different benefits.

To date RETOSA has 63 members across the globe (RETOSA, 2007). Almost 21% (see table 2.1) of these members originate from South Africa. That means South Africa has the highest number of members followed by Zimbabwe and Mozambique. The number of RETOSA members is worrying and it also raises questions regarding SADC's Member States' commitment regional integration in tourism. It is suggested that in order to increase membership, RETOSA should embark on an aggressive marketing drive.

Table 2.1:   RETOSA Membership by Country

Country	Number of Members	Percentage (%) share	Country	Number of Members	Percentage (%) share
Angola	2	3.2	Mozambique	5	7.9
Botswana	2	3.2	Namibia	5	7.9
DRC	2	3.2	Seychelles	1	1.6
France	1	1.6	South Africa	13	20.6
Germany	2	3.2	Swaziland	2	3.2
Lesotho	2	3.2	Tanzania	3	4.7
Malawi	5	7.9	United Kingdom	1	1.6
Mauritius	4	6.3	USA	2	3.2
Zimbabwe	8	12.9	Zambia	3	4.7
TOTAL	**28**	**44.4**	**TOTAL**	**35**	**55.6**

(Source: RETOSA, 2007)

RETOSA uses four pillars to promote and market the region to the target market (RETOSA, 1998): *Adventure* - Africa is exciting!, *Affordability* - The exchange rates between European, US and African currencies enable visitors to enjoy a splendid African adventure at very affordable prices, *Big Game* - Southern Africa is the home of the largest, most spectacular and exciting wildlife on the planet. The region has 300 000 elephant, thousands of lion, leopard and millions of other animals, and *Diversity* - From the snow-covered peaks of

Kilimanjaro, to the beaches of Mauritius and coral reefs of the eastern seaboard, Southern Africa offers the tourist unparalleled diversity and variety.

2.4.3. ECONOMIC SIGNFICANCE OF TOURISM TO THE SADC REGION

The region's tourism performance, like its overall economic development, is two-tiered, with South Africa being far more advanced than the fourteen remaining Member States. Furthermore, the performance of the region's tourism sector is varied, with those countries involved in internal conflict underachieving or underperforming (Cleverdon, 2002).

Over the past decade, tourists' arrival into the region has been expanding. The UNWTO records the tourist arrivals into Africa in terms of the five regions, namely North, West, Central, East and Southern Africa. The SADC Member States fall within the three UNWTO African regions as follows – Southern Africa (Botswana, Lesotho, Namibia, South Africa and Swaziland), Eastern Africa (Malawi, Mozambique, Mauritius, Seychelles, Madagascar, Tanzania, Zambia and Zimbabwe) and Central Africa (Angola and Democratic Republic of Congo). This shows that in order to estimate and also interpret tourist's statistics into the region accurately, the tourist's arrivals should be carefully considered.

Accordingly to World Travel and Tourism Council (WTTC, 2006), the demand for travel and tourism within SADC region grew from US$12.656 billion in 1990 to US$28.939 billion in 2006, reflecting an average annual growth rate of 10 percent. The WTTC statistics for the SADC region further show an increasing contribution of the travel and tourism economy to the overall gross domestic product[10] (GDP). In the SADC region, the travel and tourism industry contributed 2.8 percent to GDP in 2006 (US$16.9 billion) and this accounted to almost 1.98% of the global market. It is expected to rise in nominal terms[11] to US$33.1 billion (2.8 percent of total GDP) by 2016. The travel and tourism economy contribution (percentage of total) is expected to rise from 8.2 percent (US$49.6 billion) to 8.3 percent (US$97.8 billion) in the same respective years. The UNWTO indicates that for the second consecutive years, Africa has been leading continent in terms of tourism growth with an overall 8 percent increase in 2006, with Sub-Saharan Africa growing by 9%. During the same period tourism within the region was responsible for 1.75 million direct jobs. The tourist's

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[10] Gross domestic product is   the value of all final goods and services from a nation in a given year (Berg and Ward, 2004)

[11] Nominal terms nominal" values are the "face value" of currency over long periods of time (years) (Berg *et al*, 2004)

arrivals to the region from the United Kingdom and France were consistently up in 2005/2006 with German arrivals stagnating. In same period Germany recorded a 1.4% decline of tourist's arrivals into South Africa (South African Tourism, 2006). Turning in the best results in 2006 were Mozambique (25%), South Africa (10%), Tanzania (11%), and Zambia (10%). It is estimated that these estimates might double if the region market and promote herself a single tourism destination.

The pace of growth in tourism demand for the remaining SADC Member States is slower than that achieved in South Africa, but still high by international standards. Performance is mixed, and account should be taken of the small base volumes involved when examining growth rates. However, five other SADC countries (Botswana, Namibia, Tanzania, Zambia and Zimbabwe) recorded double-digit rates of growth in terms of arrivals over the course of the 1990's (Cleverdon, 2002).

Table: 2.2: International Tourists Arrivals (1000) to SADC by Country of Destination (1990 – 2006)

SADC Member State	1990	1995	2000	2001	2004	2005	2006	% Market share 2006	% Change (06/05)
Angola	67	9	51	107	194	210	-	-	-
Botswana	543	521	1,104	1,406	1,523	1,675	-	-	-
DRC	55	35	103	35	30	61	-	-	-
Lesotho	242	209	302	329	304	304	357	2.7	17.4
Madagascar	53	75	160	139	229	277	357	-2.7	28.8
Malawi	130	192	228	424	471	-	-	-	-
South Africa	1,029	4,684	6,001	6,640	6,815	7,369	8,396	64.3	13.9
Mauritius	292	422	653	702	719	761	788	6.0	3.5
Mozambique	-	-	-	441	470	-	-	-	-
Namibia	-	272	656	695	-	778	-	-	-
Tanzania	-	285	459	552	566	590	-	-	-
Swaziland	263	300	281	461	459	839	873	6.7	4.0
Zambia	141	163	457	413	515	669	-	-	-
Zimbabwe	636	1,416	1,967	2,256	1,854	1,559	2,287	17.5	46.7
TOTAL	**3,541**	**8,867**	**12,422**	**14,600**	**14,149**	**15,092**	**13,058**	**100**	**-10.9[12]**

(Source: UNWTO Tourism Highlights (2004 – 2007 editions))

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[12] The percentage is a negative figure because the tourism performance of the other SADC Member States were not available during the publication of UNWTO Tourism Highlights 2007 Edition

The tourism sector has a strong "flow-through effect" with travel across all SADC countries. The tourism sector is of export interest to almost all SADC Member States because it is a source of foreign exchange and also a major source of employment. For many SADC Member States, in particular the least developed (Malawi, Mozambique, Tanzania & Zambia) tourism is probably the only economic sector which provides concrete and quantified growing trading opportunities. It is one of the fundamental pillars for their economic development (Mbekeani, 2004).

Table 2.2 shows, derived from UNWTO that South Africa is the highest recipient, 64.3%, of international tourism arrivals into the SADC region, followed by Zimbabwe (17.5%) and Swaziland (6.7%). Despite the political instability in Zimbabwe, the number of international tourist arrivals has been increasing and despite her land size, Swaziland attracts the third highest number of international tourists' arrivals. The number of international arrivals into DRC and Angola is still very small. This is attributed to the political instability due to the civil wars in Angola (1975 – 2002) and DRC (1997 – 2003).

The UNWTO's *Tourism 2020 vision* forecasts growth rates of 8.4% in 1995 – 2010 and 6.1% in 2010 to 2020, and also producing an overall rate expansion of 7.5% per year between the years 1995 – 2020 in the SADC region. It is also forecasted that there is a potential for industry jobs to grow by 642, 200 and the economy jobs by 1, 6 million by 2010.

Table 2.3 depicts a similar picture as depicted by table 2.2. According to table 2.3, South Africa is the highest recipient of the international tourist receipts. In 2006 South Africa recorded almost 70.4% of SADC's international tourist receipts. Table 2.3 further shows that during the similar period, Mauritius and Tanzania recorded the second and third highest international tourists' receipts, respectively. During the 2006/5, Zimbabwe recorded the highest % growth rate (241.4%), followed by Tanzania (11%) and Namibia (10.3%).

Table: 2.3: International Tourism Receipts (US$, million) to SADC by Country of Destination (1990 – 2006)

SADC Member State	1990	1995	2000	2001	2004	2005	2006	% Market share 2006	% Change (06/05)
Angola	13	10	18	49	66	-	-	-	-
Botswana	117	162	222	457	549	562	537	4.8	-4.4
DRC	7	-	-	1	1	-	-	-	-
Lesotho	17	27	24	28	34	30	28	0.2	-6.7
Madagascar	40	58	121	76	105	62	-	-	-
Malawi	16	17	25	23	24	26	-	-	-
South Africa	1,832	2,125	2,675	5,523	6,282	7,327	7,825	70.4	6.8
Mauritius	244	430	542	696	853	871	1,007	9.1	15.6
Mozambique	-	-	74	98	95	130	-	-	-
Namibia	85	278	160	330	403	348	384	3.4	10.3
Tanzania	65	502	377	647	746	824	914	8.2	11.0
Swaziland	30	48	37	101	95	78	74	0.6	-5.1
Zambia	41	47	111	149	161	164	-	-	-
Zimbabwe	60	145	125	61	194	99	338	3.0	241.4
TOTAL	**2,567**	**3,849**	**4,511**	**8,239**	**9,608**	**10,521**	**11,107**	**100**	**5.6**[13]

(Source: UNUNWTO Tourism Highlights, 2004 – 2007 editions)

The two tables (table 2.2 and 2.3) show that there is a problem of tourists' data collation in most of SADC's Member States. This situation makes benchmarking and estimation very difficult and sometimes impossible. The two tables show that SADC's top performers in terms of tourism arrivals and spending are South Africa, Botswana, Zimbabwe, Swaziland, Namibia and Mauritius. It is noted that almost all the best performing Member States are neighbouring SADC's top performer in tourism, South Africa.

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[13] The percentage is a negative figure because the tourism performance of other SADC Member States were not available during the publication of the UNWTO Tourism Highlights 2007 Edition

2.5. REGIONAL DESTINATION BRANDING OPPORTUNITIES FOR THE SADC REGION

This section outlines the regional destination branding opportunities available for SADC region, namely 2010 Soccer World Cup, introduction of Univisa and transfrontier conservation areas.

2.5.1. 2010 FIFA SOCCER WORLD CUP

Fédération Internationale de Football Association (FIFA) in her 101 years of existence has awarded the hosting of the FIFA World Cup to an African country for the first time in 2004 for 2010 Soccer World Cup. This followed FIFA's historic decision in 2001 to introduce a system of continent rotation. Thus, South Africa was awarded the right to host Soccer World Cup in 2010. South Africa has committed that the 2010 Soccer World Cup would be an African World Cup. As the host, South Africa stands not as a country alone but rather as a representative of Africa and as part of an African family of nations.

It is expected that 2010 FIFA Soccer World Cup will positively fast track tourism development within the entire SADC region. Amongst others, the benefits of the 2010 Soccer World Cup will be to strengthen South Africa's and the region's tourism brand.

For four weeks in June – July 2010, South Africa and the region will be the centre of the world's attention. An estimated 2.7 million spectators will watch the 2010 FIFA Soccer World Cup™'s 64 matches played around the country. And when the final is shown, an estimated television audience of up to 28 billion people will have their eyes glued on South Africa.

According to consulting firm Grant Thornton (undated), the World Cup will pump around R21.3-billion into South Africa's economy, generating an estimated R12.7-billion in direct spending and creating an estimated 159, 000 new jobs. The 2010 FIFA Soccer World Cup creates an opportunity for South Africa and the SADC region as a whole to showcase her tourism offerings or attractions to the whole world.

2.5.2. INTRODUCTION OF UNIVISA

Before November 1884, Africa did not have national borders. The inhabitants of the great continent of Africa were living and moving freely across the continent without any restrictions. A conference was held in Berlin, Germany (November 1884 – February 1885) under the leadership the First Germany's Chancellor Otto von Bismarck convened in Berlin to discuss the partitioning of Africa into colonies to be shared amongst seven imperial powers of Great Britain, Belgium, France, Spain, Italy, Germany, and Portugal.

After the Berlin Conference, the European powers made bilateral treaties with each other and drew boundaries to define their various spheres of influence. These are the borders we recognise as national boundaries today.   These European powers introduced Visa systems in Africa. Through this system, the free movement of people within the continent is being blocked.

 If SADC is committed to implementing the provision of the Protocol on the Development of Tourism by "*aggressively promoted as a single but multifaceted tourism destination capitalising on its common strengths and highlighting individual Member State's unique tourism attractions*", it has to facilitate removal of travel and VISA restrictions and harmonisation of immigration procedures and also implement a UNIVISA System for tourists. According SADC (2003) Univisa will cover travel throughout the Southern African region which includes Botswana, Mozambique, South Africa, Zimbabwe, Zambia, Swaziland, Namibia, Seychelles, Madagascar, Tanzania, DRC, Angola, Lesotho, Mauritius and Malawi, they are all going to be part of that unified travel identification system. This will make it easier for tourists to travel the entire region without any restrictions. As a result the entire region will be accessible to the tourists and will be seen as one.

2.5.3. TRANSFRONTIER CONSERVATION AREAS

Butler *et al* (2000) define the Transfrontier Conservation Areas (TFCA) as relatively large areas, straddling frontiers between two or more countries and cover large-scale natural systems encompassing one or more protected areas. TFCAs involve a unique level of international co-operation between the participating countries, particularly issues related to the opening of international boundaries within each region.

The success of the TFCA initiative depends on the support of the Head of State (Political), relevant international bodies such as SADC (Regional), relevant technical responsible agencies such as immigration, police, home affairs, customs, and health, (Technical), and private sector investors, bilateral and multilateral aid agencies (Financial).

Butler *et al* (2000) assert that partnership in regional tourism planning is important regardless of its geographical context. Coordinated efforts between government agencies, different levels of administration, and the private and public sector contribute to a better balance in resource use, infrastructure development, human resources management, and promotion efforts. However, in regions where natural and cultural resources lie across, or adjacent to, international boundaries, cross border joint efforts are necessary. The importance of cross-border collaborations are to reduce over-exploitation of resources on one side of a border, and decrease the costly and needless duplications of facilities and services, such as airports and hotels, publication and distribution of joint promotional materials, as well as concerted efforts in marketing research and planning. Budgets on both sides of the border can be decreased and the difference spent on other important aspects of management such as conservation and infrastructure development, and since broadcast media spill across national frontiers, more collaborative efforts to promote common destinations would increase efficiency and reach a larger and more diverse market (Butler *et al*, 2000).

National parks represent one of the most important types of tourist destination in the world (Butler *et al*, 2000). In the century and a quarter since their establishments, national parks have played a significant role as tourist attractions in many SADC countries. In some they are the major set of tourist attractions and the foundation of small but often important tourism industries. Various countries use images of National Parks in their tourism promotion activities (Butler *et al*, 2000).

There are currently seventeen TFCAs (see figure 2.6) within the SADC region each involving land from two or more participating countries, that have already been established (or are in the process of being established) and have political support, with international agreements currently being developed or already ratified. The TFCAs are vehicles for conservation and sustainable use of biological and cultural resources, facilitating and promoting regional peace, co-operation and socio-economic development. It taps on the notion that nature knows no boundaries (Butler *et al*, 2000).

The SADC region's vision about the cross-border initiatives is to promote synergy in regional initiatives for economic, social and conservation benefits over the subcontinent. The TFCA presents a great opportunity for SADC to develop a regional tourism brand (Butler *et al*, 2000).

Figure 2.6: Map of SADC showing TFCA

(Source: SADC, 2008)

2.6.   CONCLUSION AND SUMMARY

This chapter has attempted to address the objective 1.4.1 as outlined in the previous chapter. It is clear from the discussions above that SADC has laid a solid foundation for tourism integration within the region. This is evident through the development of policies, such as Tourism Protocol and the Charter of the Regional Tourism Organisation of the Southern Africa and strategies as well as establishing an organisation to pursue this goal. The region has realised that cross – border cooperation in tourism promotion increases global competitive advantage and reduce pressure of marketing and promotion costs from the Member States.

Currently, SADC's Member States compete against each other for the few millions of the international tourists' visiting her shores. Even if on aggregate basis it shows a huge growth in international arrivals in the region, only few countries benefit. South Africa receives more than seventy percent of these arrivals; the rest is shared amongst the other thirteen countries.

It is clear that almost all SADC's Member States have tourism development plans and marketing strategies/programmes with clear destination branding campaigns which they are implementing. These Member States are all signatories to the Tourism Protocol; it shows their willingness to cooperate in the area of tourism development, promotion and marketing.

The 2010 Soccer World Cup, introduction of univisa as well as the transfrontier conservations areas (TCFA) presents a great opportunity for SADC to develop a regional tourism brand. Proper leverage on the opportunities presented by 2010, SADC will benefit from its marketing efforts.

The next chapter will attempt to address second objectives of the study as outlined in chapter 1 which includes an overview of destination branding.

CHAPTER 3
AN OVERVIEW OF DESTINATION BRANDING

3.1. INTRODUCTION

Although the concept of branding has been applied extensively to products and services, tourism destination branding is a relatively recent phenomenon. In particular, destination branding remains narrowly defined by many practitioners in destination management organisations (DMOs) and it is not well represented in the tourism literature (Blain *et al*, 2005). Tasci *et al* (2006) point out that destination branding only emerged as a topic of inquiry in the 1990s. To date within the SADC region, the concept of destination branding is primarily applied at resort, city and country level, and is not applied at regional level as proposed in this study.

In the past decades, an increasing amount of research (Ekinci, 2003) has examined the area of branding with a strong focus on consumer goods and grocery products. Given the above background, this chapter gives a literature review on product and destination branding. The terms destination and branding (product and destination) are defined and their main elements are outlined. In defining the terms destination and branding some examples or elements from chapter 2 will be used. Various product and destination branding concepts will also be defined and analysed. The chapter will also outline the theoretical branding frameworks, which will serve as a critical input into proposing a regional destination branding framework for the SADC region in chapter 5. In addition the significance and tools of destination as well as challenges of branding destinations are discussed.   Finally, the chapter will outline and discuss the differences and similarities between branding a product and a tourism destination. This chapter will further focus on the challenges and benefits of branding a region.

3.2. LITERATURE REVIEW OF PRODUCT BRANDING

No one can with certainty say why, how and when branding has arisen (Stern, 2006). Stern (2006) asserts that the word brand was first found in the German languages that evolved into Old English (Anglo-Saxon), in which it appeared as a noun (ca. 1000) in the epic poem - Beowulf and as verb (ca. 1400) in Wycliffe's religious tract - An Apology for Lollard

Doctrins. In fact, the word is even older, dating from at least the late fifth century A.D., when the event the Beowulf took place. Thus brand was used for 15 centuries before it entered marketing in 1922, when it appeared in the compound brand name, defined as a trade or proprietary name.

During the Greek and Roman times, shop keepers hung pictures above the shops indicating the types of goods sold. Symbols were developed to provide an indication of the retailer's speciality and thus the brand logo as a shorthand device signalling the brand's capability was born. In the Middle Ages, craftsmen with speciality skills began to stamp their marks on their goods and trademarks. Distinguishing between different suppliers became more common. In these early days, branding gradually became a guarantee of the source of the product and ultimately its use as a form of legal protection against copying grew. The next landmark in the evolution of brands was associated with the growth of cattle farming in the New World of North America (Stern, 2006). Cattle owners wanted to make it clear to other potentially interested parties which animals they owned (Chernatony and McDonald, 1998). A conceivable explanation could be that branding satisfies a core need for the human being to show possession of objects. The first kind of branding that's historically supported is the branding of cattle. There are ancient Egyptian mural paintings that picture branding of different animals. Even if the concept of branding has such old tradition, the brand of today is a relative late invention (Melin, 1997).

What we could call the modern brand first appeared in the second half of the 1800s and is considered to have its origin in the United States of America (USA) and Great Britain. In these countries the achievements of the industrial revolution resulted into mass production, mass distribution and mass communication. The brand became a tool to differentiate all of these products and a way of enhancing the products in the company's marketing efforts (Melin and Urde, 1990). Long (undated) indicates that the modern branding is only a 50+ year old discipline, in its infancy, in its "the world is flat mode". In addition he asserts that the modern branding was born of the TV and the need drive consumption to a mass market. Communicating with a mass market required broadcast. Fast moving consumer goods have driven branding for the first 50 years (Food Institute, 2002).

According to Gordon and Corr (1990); Kapferer (1997) and Melin (1997) today's obsession with brands began with Nestle's take-over of Rowntree in 1988, which demonstrated in hard

cash that the latent value of the Rowntree brand was some £1 billion. This spectacular happening resulted in brand owners bringing to examine their brand portfolio with magnifying glass and with new respect (Gordon *et al*, 1990). Since then the number of brands have grown significantly within the Fast Moving Consumer Goods (FMCG) industry. Average number of brands in a supermarket went from 20,000 in 1990 to over 32,000 in 2002 (Food Institute, 2002).

Stern (2006) uses quadripartite brand classification scheme in which brand is categorised as nature (literal and metaphoric), function (entity and process), locus (physical and mental), and valence (positive and negative). The classification of brand as either an entity or a process rests on the fact that it can be used as either a noun or verb. As a noun, brand refers to entities such as people, places, things, and ideas; as a verb, it refers to processes included in a firm's endeavour to make product meaningful such as naming the product, targeting, and positioning it, and communicating its benefits. That is, in the world, brand denotes a name or mark that is associated with a product, in the mind, it denotes a mental representation, an idea, or a consumer's perception of psychological meanings and in cyberspace and it denotes a repository of information. Brand is also ambivalence, in that it has a positive and negative meaning that contributes to multidimensional applicability. Ambivalence is inherent in the term's derivation from the old Germanic brinn-an (to burn), referenced in its definition relevant to marketing is the association with burning as a mark of identification, which first appeared in the fifteenth century, when brand signified a burn mark that was "a mark of ownership impressed on cattles and horses. However, in addition to the positive meaning of identification, brand as a burn mark also has a negative meaning dating back to its use as a sign to communicate the idea of disgrace stamped on something odious. The negative meaning was the one that first entered modern marketing in the early compound Brand X, used to compare the well-known old gold cigarette brand to an anonymous, unbranded, and presumably inferior product.

Upshaw (1995) defines a brand as the name, logo and other outwards symbol that distinguishes a product or service from others in its product category. Brands are also referred to as the flags of marketing. They stake out a certain territory and inform the world that what lies within sight of the flag belongs to those who fly it (Upshaw, 1995). The brand gives the product or destination the competitive edge it deserves.

The consumers will then not confuse the products/services at all with other products in the same product category.

Kolb (2006) defines branding, at a product or service level, as a process of creating a slogan from a message and then designing a symbol or logo that together within the slogan will communicate to potential customers the image of the products or services along with its features, benefits and values it offers. The American Marketing Association(AMA) (1960) further defines a brand as a "name, term, symbol or design, or a combination of them, intended to identify the goods or services of one seller or group of sellers and to differentiate them from those of competitors.

In order to fully understand the theory behind product branding, the key brand concepts are defined as a way of introducing the product branding theory. The following are the core concepts of the product branding: Brand equity, brand identity, and brand personality. Each of these product brand concepts have elements which are outlined below:

The brand equity: Aaker (1995), Upshaw (1995) and Aaker *et al* (2000) define brand equity as a set of assets (and liabilities) linked to a brand's name and symbol that adds to (or subtract from) the value provided by a product or service to a firm and/or that firm's customers. Brand equity has a direct influence on, among other things, a parent company's potential selling price, its absolute revenue and the profit. Aaker (1995) and Upshaw (1995) further identify the following major assets categories of the brand equity: brand name awareness, perceived quality, brand loyalty and brand associations. Brand name awareness refers to the strength of a brand's presence in the consumer's mind, perceived quality is a brand association that is elevated to the status of a brand asset for several reasons, brand loyalty is a key consideration when placing a value on a brand that is to be bought and sold, because a highly loyal customer base can be expected to generate a very predictable sales and profit stream and brand associations refer to all associations that consumers make with a brand such as product attributes, a celebrity spokesperson, or/and a particular symbol.

The brand identity refers to the part of the brand equity that reaches outwards to offer benefits that makes it more attractive as the object of a possible purchase (Upshaw, 1995). Brand identity traps demonstrate the value of expanding the concept of a brand

and provide substantial insight into what a brand identity is and is not. These traps represent approaches to creating an identity that are excessively limiting or tactical and that can lead to ineffective and often dysfunctional brand strategies. The four brand identity traps are as follows: The Brand Image Trap, The Brand Position Trap, The External Perspective Trap and The Product-Attribute Fixation Trap.

Brand Identity Perspectives: Aaker (1995) identifies the four brand identity perspectives that help the strategist to consider different brand elements and patterns that can help clarify, enrich, and differentiate an identity. A more detailed identity will also help guide implementation decisions. These Brand Identity Perspectives are: Brand as a Product (it is linked to brand choice decision and the use experience), Brand as an Organization (focuses on the attributes rather than those of the product or service – innovation, a drive for quality, concern for environment and cultural values), Brand as a Person (brand can be perceived as being upscale, competent, impressive, trustworthy, fun, active, humorous, casual, formal, youthful, and intellectual) and lastly, Brand as a Symbol (involves visual imagery that can be memorable and powerful. A strong symbol can be the cornerstone of a brand strategy).

The brand personality: Aaker (2005) and Upshaw (2005) define a brand personality as the outward "face" of a brand, its tonal characteristics most closely associated with human traits. Thus brand includes such characteristics as gender, age, and socio-economic class, as well as such classic human personality traits as warmth, concern, and sentimentality.

Aaker *et al* (1995) identified the following types of brands – Strategic brand (a currently dominant brand that is projected to maintain and grow its position), linchpin brand (leverage point of a major business area or of a future vision of the firm, silver bullet (brand that positively influences the image of another brand) and cash cow brand (brand with a significant customer base that does not require the investment that other portfolio brands require). These brands are classified and defined in terms of their ability to influence the customers to select a particular product or service.

Louro and Cunha (2001) define *brand management paradigm* as a deep-seated way of seeing and managing brands and their value, shared by the members of any organisational

36

community marked by a common culture. An organization's dominant paradigm determines its understanding of brands, the process and content of the brand strategy and, consequently, their potential contribution to competitive advantage. Brand management paradigms constitute an organization's portfolio of implicit assumptions, collective beliefs, values, and techniques concerning the *why* (the objectives and measures of brand management, the *what* (the concept of brands), the *who* (the organizational structure of brand management) and the *how* of branding (the variables of brand management).

The structure and content of brand management paradigms shape how members of an organization see and manage brands by orienting their perceptions, interpretations and decisions (Weick, 1979). The brand management paradigms are differentiated along two analytical dimensions, namely brand centrality dimension and customer centrality dimension. The brand centrality dimension reflects the extent to which a firm's brand portfolio provides the underlying *leitmotif* for strategic formation and development of marketing activities. This dimension runs from the tactical orientation (legal and visual), where brands are conceptualised and managed as tactical instruments appended to a product, to a brand orientation "in which the processes of the organization revolve around the creation, development and protection of brand identity".

The customer centrality brand refers to the shared beliefs among a firm's top managers about the nature of consumer involvement in the value creation. This dimension runs from unilateral approaches in which consumers are perceived as passive receipts of value created within the organisation (Hooley & Lynch, 1990 and Kotler, 1991) to multilateral perspectives where consumers are viewed as active contributors to value creation (Rindova and Fombrun, 1999 and Prahad &and Ramaswamy, 2000).

Figure 3.1: Brand Management Paradigm

Brand Centrality

Tactical Orientation
(low)

Customer

Product
Paradigm

Adaptive
Paradigm

Unilateral
(low)

Multilateral
(high)

Centrality

Projective
Paradigm

Relational
Paradigm

(high)
Brand Orientations
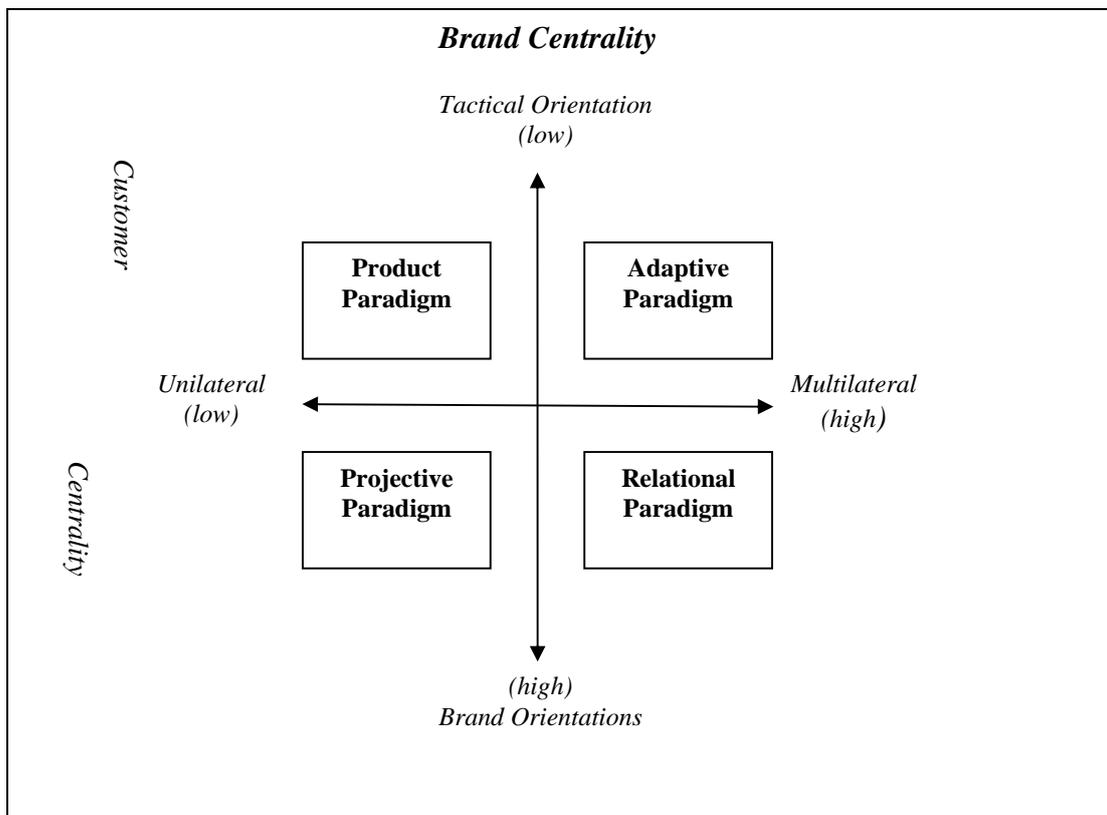
(Source: Louro *et al*, 2001)

Louro *et al* (2001) identified the following brand management paradigms: product paradigm, projective paradigm, adaptive paradigm and relational paradigm. These paradigms are defined below:

- *Product Paradigm* reflects a tactical approach to brand management centred on the product as the locus of value creation. Brands are construed as logos and legal instruments that perform firm-centred brand roles (de Chernatony and Dall'Olmo Riley, 1998a and 1998b),

- *The Projective Paradigm* complements and amplifies the product paradigm by highlighting the strategic dimension of branding. Within the projective paradigm brand management is enacted through the creation, development and communication of a coherent brand identity (Kapferer, 1992 and Aaker, 1996),

- *The adaptive paradigm* posits a diametrical approach to brand management stressing the role of consumers as central constructors of a brand meaning. This approach resonates a

spectrum of consumer-centred brand definitions ranging from shorthand devices to brands as images. Brands, in this paradigm, are construed as performing essentially consumer centred roles (de Chernatony *et al*, 1998a) facilitating decision-making, reducing risks (Keller, 1998) and search costs (Jacoby, Szybillo and Busato-Schach, 1997), inherent to product acquisition, signalling quality (Shocker and Chay, 1992) and providing symbolic value (Fournier, 1998), and

- *The Relational Paradigm* perspective conceptualizes brand management as an ongoing dynamic process, without a clear beginning and ending, in which brand value and meaning is co-created through interlocking behaviours, collaboration and competition between organizations and consumers (Putman, Phillips & Chapman, 1996).

3.3. THEORY AND DEFINITION OF A DESTINATION

There are different understandings of the concept of "destination" and different actors in the tourism industry and among tourism researchers use it differently (Framke, 2001). The analytical frameworks in which tourism has been studied have largely been constructed by geographers. This is partly because tourism constitutes their natural milieu, being spatial in nature (Stabler, 1991). This section will outline the use and content of the term "destination" by two types of researchers who worked with the tourism phenomenon, namely classical/ conventional and socio-cultural writers (Framke, 2001). It is the results of over thirty years of research around the use and content of the term "destination". In trying to understand how these different writers understand the term "destination" four questions will be raised, namely: How are the geographical boundaries of a destination described? How is the content of a destination described? How is the existence of or the need for cooperation among businesses at a destination described? How is the tourist's behaviour understood in relation to the production of destinations? The answers to these questions are analysed in table 3.1 below.

Georgulas (1970); Murphy (1985); Cohen (1972); Plog (1974); Burkart and Madlik (1974); Mill and Morrison (1992); Cooper, Fletcher, Gilbert & Wanhill (1993); Jensen, Hansen & Metz (1993); Jakobsen (1997) and Jensen (2001) are described as the classical/ conventional writers of the term "destination". In the sociological field the following authors, came up with the use and content of the term "destination", MacCanell (1976); Edensor (1998) and

Meethan (2001). Table 3.1 summarises the issues raised by two groups of writers in relation to the four areas on "destination" outlined above.

Table 3.1: Views of the Classical/ Conventional Writers and Sociological Writers relating to the term "Destination"

Questions	Classical/ Conventional Writers	Sociological Writers
Geographical limitation of the destination	Agreement about the destination as an important place No agreement about the spatial characteristics: "destinations" are units without geographical boundaries and/or administrative level	Destination as a place without defined geographical boundaries, developed by continuous process of social interaction among actors participating in the process "Destination" as structures, as images, and as the results of social practices
Destination content	Agglomeration of core and peripheral attractions and services Dynamic with respect to the tourists demand	With regard to the dynamic process shaping the place where tourism happens No clear description of content Attraction, culture, events, landscapes and services are mentioned
Cooperation at a destination	Implicit understanding of the need for cooperation in the tourism industry No discussion of character and significance of cooperation for the constitution of a destination	No description of a cooperation at a destination Talk about connections and social practice without further specifications
The Tourists	Seen as economic consumers, as segments and as types Changing demand changes the structure and content of the "destination"	Seen as experience seeking social actor and as consumer The tourist demand creates social practices forming a national space
Geographical limitation of the destination	Agreement about the destination as an important place No agreement about the spatial characteristics: "destinations" are units without geographical boundaries and/or administrative level	Destination as a place without defined geographical boundaries, developed by continuous process of social interaction among actors participating in the process "Destination" as structures, as images, and as the results of social practices
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Geographical limitation of the destination	Agreement about the destination as an important place No agreement about the spatial characteristics: "destinations" are units without geographical boundaries and/or administrative level	Destination as a place without defined geographical boundaries, developed by continuous process of social interaction among actors participating in the process "Destination" as structures, as images, and as the results of social practices
Destination content	Agglomeration of core and peripheral attractions and services Dynamic with respect to the tourists demand	With regard to the dynamic process shaping the place where tourism happens No clear description of content Attraction, culture, events, landscapes and services are mentioned

(Source: Framke, 2001)

It is clear from the above discussion that tourists do not visit a particular country (ies) but go on a vacation because of particular attraction(s) and events. This is an important input in terms of the regional destination branding framework development. In most cases tourists just know about various attractions or events but they don't know where these events are exactly happening.

These two schools of thought or groups of writers above, bring about two dimensions of a "destination", namely static and dynamic. In a static dimension, a "destination" is defined as the sum of interests, activities, facilities, infrastructure and attractions that creates the identity of a place; and in a dynamic dimension a "destination" is defined as a mix and agglomeration of agents and products / services, varying with the tourists' historically changing demands (Framke, 2002).

A tourism destination is viewed as an amalgamation of individual products and experiences that are combined to form the total experience of the area visited (Murphy, Pritchard and Smith, 2000). Murphy *et al's* (2002) definition of a destination fully support the static definition of a destination as outlined above.

In addition to the use and content of the term "destination" as outlined by two groups of writers above, Vengesayi (2003) defines a destination from an attractiveness and competitiveness perspective. Destination attractiveness is defined as the perceived ability of the destination to deliver individual benefits. This ability is enhanced by the attributes, or contents of the destination as per the views of the groups of writers above. Destination attractiveness is a demand side perspective of the destination. The attractiveness of a tourist destination encourages people to visit and spend time at the destination. Through the attractiveness definition, the destination is not confined to space or a place.

On the other side, destination competitiveness is associated with the ability of the destination to deliver an experience that is more satisfying than that offered by other destinations (Vengesayi, 2003). Destination competitiveness is a technique and methods that can be used to analyse and compare the diverse attributes of the destination in the context of planning. Destination competitiveness technique or definition confines the destination to a space or a place.

Competitiveness and attractiveness view destinations from two different perspectives (Buhalis, 2001); one from the tourist or demand perspective (attractiveness), and the other from the destination or supply perspective (competitiveness). Dual analysis of these two concepts provides a holistic perspective of the Tourist Destination Competitiveness and Attractiveness (TDCA) dynamics. Vengesayi (2003) define TDCA as the ability of a destination to provide social, physical and economic benefits to the destination population as well as the satisfying experience to the tourist. The studies of the destination attractiveness have centred on the needs of the tourists and what attracts them to various destinations, while those of the destination competitiveness have focused on the ability of organisations to produce products that are accepted internationally.

The concept of tourism destinations is a critical input in the understanding of the uniqueness of the process of destination branding. A tourism destination is characterised in two main

ways: The first characteristic of a tourism destination is the understanding that it is a physical space in which tourism takes place. From this viewpoint, the tourist is an active participant in the production of tourism spaces and actively acts on them and interacts with them with the consequence that tourists' practices contribute to the ways in which places are constituted (Shaw and Williams, 2004).

Secondly, a tourism destination exists through the interactions of different elements. In this sense, tourism destination can be recognised as an amalgamation of products, facilities and services[14] that together comprise the travel experience (Buhalis, 2003). Thus, the destination is just a part of the tourist product (Middleton and Clarke, 2001) and is not to be considered as a product itself but simply as "a geographic area within which any number of tourism products can be purchased and consumed" (French, Collier and Craig-Smith, 2000). Franzen and Bouwman (2001) further support the above assertions, by indicating that physical space and physical attractions are just elements of the destination that the tourists interpret and combine in their mental world, but not the entire destination by themselves.

Symbols and images play a fundamental role in the destination building process (Bierman, 2003; Morgan, Pritchard and Pride, 2004; Pike, 2002 & Trauer and Ryan, 2005) but also add a further element to the complexity of the definition of the destination. Symbols and images are just elements like physical space and physical attractions.

Law (1995) indicates that the success of a tourist destination depends on the regular arrival of large numbers of visitors, and the effects of their activities while they stay there. The flow of tourists to a destination is determined by several factors, including the destination's accessibility, the relative expense of visits, and how aware potential visitors are of the attractions and amenities it offers. Law (1995) further identifies factors which contribute to the attractiveness of a tourism region, namely primary and secondary features. The primary features include its climate, ecology, cultural traditions, traditional architecture and its land reforms. The secondary destination features are the developments introduced specifically for tourists, such as hotels, catering, transport, activities and amusements. The distinction

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[14] Tourism products, facilities and services include accommodation facilities (hotels, bed and breakfast, motels, game lodges and backpacking), attractions (scenic beauty, wildlife, history and heritage and culture), accessibility (airline), and booking systems.

between primary and secondary tourism resources draws attention to a striking characteristic of many tourists' destinations.

The discussion above shows how complex it is to define the term "destination". Shown below is the work of various researchers who have attempted to coin the definition of the term destination. Bodlender, Jefferson, Jenkins and Lickorish (1991) provide a definition of a destination as "a collection of physical and service features together with symbolic associations which are expected to fulfil the needs of the buyer". The researchers did not confine the definition of a destination to a physical place or further. The tourist destinations are further defined as spaces of leisure for the guests and space of work or home for the hosts (Meethan, 2001).

According to the UNWTO (2004) a local tourism destination is a physical space in which a visitor spends at least one (over)night. It includes tourism products such as support services and attractions, and tourism resources within one day's return travel time. It has physical and administrative boundaries defining its management, and images, and perceptions defining its market competitiveness. The UNWTO definition of a destination confines a destination to a particular physical space.

Tourism destination is described as a highly complex domain in which interest and aspirations of the stakeholders are quite divergent (Buhalis, 2000 & 2001; Cooper, Fletcher, Fyall, Gilbert and Wanhill, 1993 & Fyall and Garrod, 2005). The definition of a tourism product is problematic both in terms of its composite nature (Berno & Bricker, 2001 & Papatheodorou, 2001) as well as in terms of the process that created it (Palmer and McCole, 2000).

Medlik and Middleton (1973) consider the tourism product as a bundle of activities, services, and the benefits that constitute the tourism experience. Middleton (1989) further looked at the tourism product under two different perspectives such as the specific and discreet product offered by a single business and the total product described as the whole experience of the tourists. Smith (1994) considered the tourism product as formed by five elements such as physical plant, service, hospitality, freedom of choice and involvement.

Leiper (1995) and Gilbert *et al* (1998) identified the following types of destinations, namely urban destinations, seaside destination and resorts, alpine destinations, rural tourism, authentic third world destinations and unique – exotic-exclusive destinations, and many more.

Most SADC Member States have two or more combinations of the destinations as defined above. For example South Africa has urban destinations like Johannesburg, and Pretoria as well as seaside destinations such as Durban, Cape Town, and Port Elizabeth. This is a trend in almost all the continents or countries around the world.

3.4. LITERATURE REVIEW ON DESTINATION BRANDING

The concept of destination branding emerged as a topic of enquiry in the late 1990s. Lemmetyinen & Go (undated), in support of the above statement indicate that destination branding is a relatively recent phenomenon as compared to the research of destination image. As Cai (2002) puts it: "destination image has been extensively studied and yet literature on the branding it is sparse". Place marketing has been subjected to substantial scholarly enquiry within recent decades (Ashworth and Voogd, 1990; Ashworth, 1991; Bennet and Koudelova, 2001; Bramwell and Rawding, 1996; Echtner & Ritchie, 1991 and 1993; Gartner, 1993; Gunn, 1988; Kotler, Asplund, Reain and Haider, 1999; Langer, 2002; Morgan & Pritchard 1998, 2000 & 2003; Morgan, Pritchard and Pride; 2003 and Ward & Gold; 1995) and in the 1990s, undoubtedly as a consequence of its wide-spread usage in product marketing, the concept of branding started to appear in place marketing literature, though there are still relatively few academic articles dealing with brand building for places. This is interesting in view of the fact that a veritable surge of lesser known European places entering into a branding process has appeared throughout the last decade – places as different as York and Milton Keynes in the west (Hakinson, 2001), Croatia in the east (Martinovic, 2002), the region of Oresund (i.e. Copenhagen and Malmo) (Pedersen, 2004) in the north and Barcelona (Kotler *et al* 1999) in the south.

The research attention on destination branding first emerged at the American Marketing Science (AMS) conference organized in Miami, USA in 1997. Presentations and discussions at the said Conference focused mainly on the development of the destination brand. The following year, the Travel and Tourism Research Association's (TTRA) 29th Annual

Research Conference was also dedicated to "Branding the Travel Market". In 1999, a special issue of the Journal of Vacation Marketing was dedicated to "Destination Branding" and early in the new millennium, a book on destination branding was edited by Morgan *et al* (Tasci and Kozak, 2006). This shows that research in destination branding is relatively recent.

Tasci *et al* (2006) further asserts that the current empirical studies on branding in the tourism destinations context are usually conceptualised at smaller levels, namely at resort, city and country levels. This is not addressing the purpose of this study, but it helps as a basic input to the understanding and the development of the regional destination brand.

Having outlined the background and the origin of a destination brand, it becomes critical to define what exactly a destination brand is. However, as in every new concept of tourism, confusion exists in the definition of the concept of "brand" in the tourist destination context. The discussions below will focus mainly on the term "destination branding".

A year after the AMS conference, Ritchie and Ritchie (1998) coined the definition of a "*destination brand*" as a name, symbol, logo, word, mark or other graphic that both *identifies and differentiates* destination; furthermore, it conveys the promise of a memorable travel experience that is uniquely associated with the destination; it also serves to consolidate and reinforce the recollection of pleasurable memories of the destination experience.

Cai (2002) further defines destination branding as selecting a consistent mix of brand elements in order to identify and distinguish a destination through positive image building.

The following year, Kaplanidou and Vogt (2003) coined the definition of destination branding as the process of combining all the attributes associated with a place (i.e. its products and services from various industries such as agriculture, tourism, sports, arts, investment and technology education) under one concept, which expresses a unique identity and personality of the destination and differentiates it from its competitors.

Two years later, Blain *et al* (2005) stated that the definition of destination branding should include the concepts of destination image and attractiveness. They define destination

branding as the set of marketing activities that serves to create a destination image, to positively influence consumer's choice of destination.

On the other end, a year later Tasci *et al* (2006) define destination branding as a selection and strategic combination of "a consistent mix of brand elements to identify and distinguish a destination through positive image building. These elements, similar to the consumer products, as indicated in chapter 2 are proposed to include terms, names, signs, logos, designs, symbols, slogans, colour, packages, architecture, typography, photographic styles, as well as heritage, language, myths and legends**.**

All of the definitions of a destination brand outlined above show that branding of the destinations enable the tourists to identify a destination and differentiate it from competitive offerings (Vengesayi, 2003).

Branding activities may essentially be viewed as based on three types of analysis: scrutinising the *identity* of a place not only on the basis of a dialogue with the multitude of local stakeholders; understanding the *demand patterns and images* of the targeted place consumers relate to the particular place, and identifying *position* of the place in view of competitors, and hence the unique qualities to be highlighted (Buhl and Dahl, 1993).

Building a destination brand involves giving particularly expressive and effective meaning to an otherwise mere geographic identity (Lemmetyinen and Go, Undated). Destination branding involves the unique benefits that the tourists will experience while visiting the city, rather than the city itself. Branding answers the question "why should I visit your city" (Kolb, 2006).

Due to the complexity of the tourism system, the destination branding process cannot be done by an individual person or organisation. According to Ooi (2004) the destination brand aims to pull together the destination, draw cooperation between different parties and stimulate the imagination of the tourists-to-be, tourists and tourism agencies.

Ideally the process of developing the city's image into a brand should involve the participation of a great many people and institutions, including government, officials, existing tourism agencies, tourist attractions, managers of cultural venues, university

officials, civic organizations, entertainment and hospitality managers, and the members of different community groups and neighbourhoods. Obtaining various opinions is the most effective method to develop a city's image that can then be packaged and branded for different tourists segments. This is especially true when developing marketing strategies that will appeal to more than one income, age, or ethnic group (Kolb, 2006).

Ritchie and Ritchie (1998) sketch the complexity of tourism marketing and destination branding claiming that in tourism "not only are we marketing a very diverse and complex product, but it is also one that is delivered by many different firms that are typically quite different in terms of their functions and capabilities. In effect, destination marketing – and thus destination branding – is much more of a collective phenomenon than is normally found in the generic marketing/ branding situation". The process of branding a tourism destination is a collective phenomenon that involves multiple stakeholders (Marzano, undated).

The tourism literature shows consistency in considering the process of branding a destination as a collaborative effort (Blain 2003; Im, 2003; Kaplanidou *et al* 2003; Morgan *et al*, 2002 and Morgan *et al*, 2003). Collaboration in the context of destination branding has been addressed under two different though complementary points of view, such as creation of a shared image of the destination and the inclusiveness of the process (Blain, 2001). The "collective phenomenon" of destination branding, has also been described as a "highly complex and politicised activity" (Morgan *et al*, 2003) that includes multiple stakeholders (Dinnie, 2002).

Collaboration theory provides a way to understand how and why stakeholders gather together in order to jointly act in a problem domain (Gray, 1989). According to Wood and Gray (1991) the elements that characterise this definition of collaboration are the stakeholders of the problem domain, the autonomy of the stakeholders, the interactive process, the shared rules, norms and structures, actions or decisions, domain orientation and the outcome. A collaborative process can be understood as a three phase process (Gray, 1989 & Ramirez, 2001) consisting of problem setting, direction setting and implementation. According to McCann (1983) the problem setting phase allows all stakeholders to identify and understand the problem and to decide whether it is appropriate to act upon it. The direction setting phase helps stakeholders understanding their different points of view and provides the basis for eventual trade-offs; and finally, in the implementation phase, stakeholders specify actions,

48

roles and tasks, design the implementation approach, implement actions, monitor and measure outcome (Margerum, 2002).

The definition of destination branding as a collective phenomenon carries critical implications: firstly, the creation and the management of the destination brand are described as requiring collaborative effort among stakeholders (Morgan *et al*, 2002), secondly, the destination brand is considered as a "common good" (Hardin, 1968), outcome of an ongoing process of collaboration among stakeholders. This led to Mundt (2002) to consider destination branding as a myth and fallacy due to lack of identifiable ownership and therefore beyond the responsibility of destination management. Furthermore, collaboration among the stakeholders in destination marketing must be balanced with the consideration that within single tourism destination different stakeholders have different roles, different agendas and benefit from tourism in a different way (Aas, Ladkin & Fletcher, 2005).

It is therefore essential in destination branding to be able to categorise the stakeholders in terms of their power, which is here defined as the "ability to impose one's will or advance one's own interest" (Reed, 1997). The ability to characterise the stakeholders in terms of their relative power is a problematic issue (Phillips, 2003) and the different measurement methods are available for assessing stakeholder power such as the positional method, the reputational method and the decision making method (Aiken and Mott, 1970). The positional method is based on the belief that "those holding positions of authority make key decisions while those who do not occupy such positions do not make decisions (Bonjean & Olson, 1964). Under this method, stakeholder's power is determined by looking at stakeholder's official status in the community's institutionalised economic, political and/or civic structures. Reputational approach or method is determined by asking informants to name and rank who they believe hold power (Bonjean & Olson, 1964). Reputational power is the power that an actor is said to have according to the other actors in the network. The major criticism of reputational power is that it does not measure real power but only perception of power (D'Antonio & Erickson, 1962 and Sharp, 2000). Finally, the decision making method relates power to the ability to take decisions.

Following Westerheijden's (1987) conceptualisation, the practical application of the positional, reputational and decision-making approaches in order to assess stakeholder power within the study of the process of destination branding requires combining different methods.

Positional power is defined by looking at the formal hierarchy of position within a tourism destination. This approach is feasible in light of the widely shared opinion that there is a hierarchy of tourism organisations charged with the development and promotion of destination images from local, through regional, to national level (Dredge & Jenkins, 2003; Edgell, 1990 and Morrison & Mill, 1998). Reputation as a source of stakeholder power is to be assessed through interviews of stakeholders involved and not involved in the process of destination branding. Decision-making power is finally assessed by content analysis of documents, reports and memoirs developed during the process (Marzano & Scott, undated). The use of these three methods together aims to triangulate results instead of providing different dimensions of stakeholder power. As observed by Scott (2003), triangulation is based on the triangle analogy, which implies that a single point is considered from three different and independent sources.

The power of destination branding has been described in terms of the ability of different stakeholders to bring their competing values and interests within the process of branding in order to influence how a destination is portrayed.

The components of destination branding are as follows: Brand image, brand character, brand identity, brand personality, brand culture and brand essence or brand soul. These destination branding components are similar to the product branding components outlined in section 3.2 of this chapter and they are outlined in detail in the next section with the exception of brand character, brand culture and brand essence or brand soul.

3.4.1. DESTINATION BRANDING CONCEPTS

This section focuses on a detailed definitions of the three most important destination branding concepts, namely brand image, brand identity and brand personality. This section does not cover the other concepts of branding such brand character, brand culture and brand essence/ soul because they mainly internal or emotional and tourists have to associate with a destination to feel them.

3.4.1.1.   Brand Image

The studies on the destination image are in abundance and started in the 1970's[15] and are not recent like the studies on destination branding, as indicated in the previous section. The origin of the studies on destination image can be traced back from the early 1970s when Hunt examined images as a development factor (1975). Cai (2002) in his study of the destination image considered the following components, namely attribute-based, holistic, functional, psychological and holistic components. Some images are based upon directly observable or measurable characteristics (scenery, attractions, accommodation facilities, price levels) and others are based on more abstract, intangible characteristics (friendliness, safety, and atmosphere), The thesis clearly demonstrates that image formation plays only a partial role in branding a destination, and total practice should involve actively and methodically building a consistent image by generating a variety of marketing activities (Cai, 2002)

Beerli *et al* (2004) indicate that even though the concept of destination image is widely used in the research context, it is loosely defined and lacks a solid conceptual structure. Crompton (1979) coined a definition of destination image as an attitudinal concept consisting of the sum of beliefs, ideas and impressions that a tourist holds of a destination. Based on the conceptual framework, destination image is defined as not only the perception of individual destination attributes, but also the holistic impressions made by the destination. Destination image consists of functional characteristics, concerning the more tangible aspects of the destination and psychological characteristics, concerning the more intangible aspects. Destination image is further defined as the development of a mental construct based upon a few impressions chosen from flood of information (Echtner *et al*, 2003). The "flood of information" includes sources such as promotional literature (travel brochures, posters), the opinion of others (family/friends, travel agents), and the general media (newspapers, magazines, television, books, movies).

The influence of these various sources of information and their role in destination image formation have been put into context by Gunn (1998) in his model of the seven phases of travel experience: accumulation of mental images about vacation experiences, modification

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[15]   Hunt (1975); Crompton (1977); Goodrich (1977); Crompton (1979); Haahti & Yavas (1983); Crompton & Duray (1985); Kale & Weir (1986); Phelps (1986); Gartner & Hunt (1987); Richardson & Crompton (1988); Gartner (1989); Calantone, Benetton, Hakam and Bojanic (1989) and Reilley (1990)

51

of those images by further information, decision to take a vacation trip, travel to the destination, participation at the destination, return home and modification of images based on the vacation experience.

Gunn's model of image formation results in two states of destination image formation, namely organic image, and modified/induced image. The organic image is based primarily upon information assimilated from non-touristic, non-commercial sources such as general media (news reports, magazines, books, and movies), education (courses), and the opinion of family/friends. Modified or induced image is based upon assimilation of commercial sources of information such as travel brochures, travel agents and travel guidebooks.

Figure 3.2:   Components of Destination Image
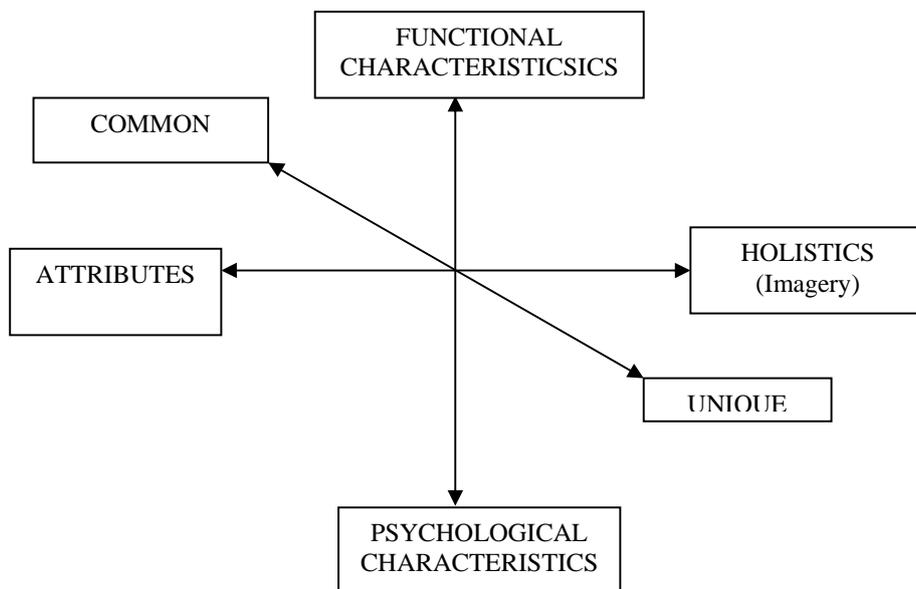
(Source: Echtner *et al*, 2003)

Figure 3.2 shows the dimensions or components of destination image that has been largely overlooked in the previous researches (Echtner *et al*, 2003). These components range from common functional and psychological traits to those based on more unique features, events, feelings or auras.

In addition to the components of destination image above, Beerli *et al* (2004) developed a model of the formation of destination image. The model was developed in a way that

differentiates between the first time and repeat tourists for several reasons: Firstly, certain differences may exist between the images perceived by each group of individuals that may have an effect on the results, secondly, the relationship between secondary information sources and perceived image can only be analysed in the case of first timers since repeat tourists could have difficulty recalling the sources of information used before visiting the place for the first time, thirdly, there may be differences between the two groups in terms of their level of knowledge of the destination in their motivations, fourthly, depending on whether they had previously visited the place or not, and lastly it enables a validation of the proposed model to be made using two independent samples.

According to Beerli *et al* (2004) information sources are also known as stimulus factors or image forming agents. They are defined as forces which influence the forming of perceptions and evaluations. The image formation agents are classified as (a) overt induced, found in conventional advertising in the mass media, from information delivered by the relevant institutions in the destination or by tour operators or wholesalers; (b) covert induced, using celebrities in the destination's promotion activities or destination reports or articles; (c) autonomous, includes mass media broadcasting news, documentaries, films and television programmes, about the place; (d) organic, involving such people such as friends and relatives, giving information about places, based on their own knowledge or experience, or whether the information was requested or volunteered; and (e) a visit to the destination.

The image formed by organic, induced, and autonomous sources of information is basically one perceived before experiencing a destination and is called secondary image (Phelps, 1986). Mansfield (1992) demonstrates that there is general agreement, although not based on empirical evidence, that the secondary sources of information fulfil three basic functions in destination choice: to minimise the risk that the decision entails, to create an image of the destination, and to serve as a mechanism for later justification of the choice.

The information acquired through personal experience or the visiting of the destination forms the primary image, which differs from the secondary image. The primary images are more realistic, complex and different from the one formed through secondary sources of information.

In addition, an individual's personal characteristics, or internal factors, also affect the formation of an image. The personal factors refer to internal determinants, in other words, the socio-demographic characteristics of the individuals (gender, age, level of education, family lifecycle, social class and place of residence), as well as those of a psychological nature (motivations, values, personality, lifestyle etc.). These personal factors affects one´s cognitive organisation of perceptions, thus also influencing the perceptions of the environment and the resulting image.

Figure 3.3: A model of the Formation of Destination Image
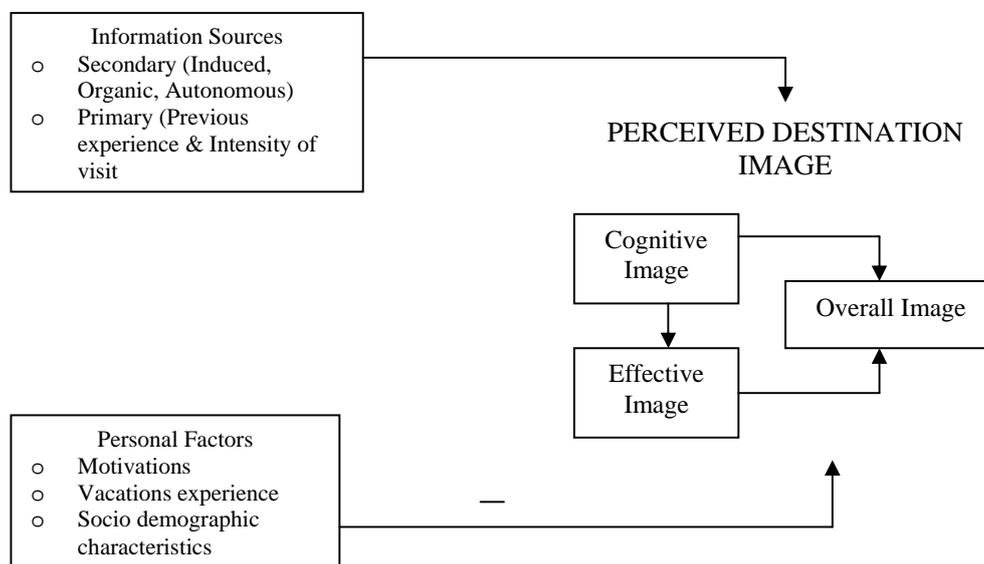
(Source: Beerli *et al*, 2004)

Echtner *et al* (2003) identified two general techniques of measuring the destination image, namely structured and unstructured approaches. In structured methodology, various common image attributes are specified and incorporated into a standardised instrument, usually a set of semantic differential[16] or Likert[17] type scales. A product(s) is rated by the respondent on

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[16]   Semantic differential was designed to measure the connotative meaning of concepts. The respondent is asked to choose where his or her position lies, on a scale between two bipolar words, or a range of words or numbers ranging across a bipolar position (for example, `Excellent', `Good', Adequate', `Poor', `Inadequate'; or from 5 (powerful) down to 1 (weak).

[17]   A L*ikert scale* (pronounced 'lick-urt') is a type of psychometric response scale often used in questionnaires, and is the most widely used scale in survey research. When responding to a Likert

each of the attributes included in the measure and an image profile is derived from these ratings. Structured methodologies use standardised methodology scales and makes it easy to administer, simple to code and the results can be analysed using sophisticated statistical techniques. The structured methodologies are attributes focused.

Unstructured methodology is the alternate form of measurement used in product image research. It uses free form of descriptions to measure image. The level of detail of unstructured methodologies is highly variable as it depends upon the verbal and/or writing skills of the individual used in the study. In order to capture all the components of image, a combination of structured and unstructured methodologies should be used.

Konecnik and Go (2007) indicates that brand image views branding from a demand-side or consumer perspective. According to Harris and de Chernatony (2003) the brand image focuses on consumers' perceptions of brand differentiations, while identity tends to be more concerned with how managers and employees jointly make a particular brand unique.

3.4.1.2.   Brand Personality

In the tourism literature, there has been a proliferation of destination image studies during the past three decades, but destination personality has been largely unexplored (Ekinci & Hosany, 2006). Destination personality is defined as the set of human characteristics associated with a destination as perceived from a tourist rather than a local resident viewpoint.

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questionnaire item, respondents specify their level of agreement to a statement. The scale is named after Rensis Likert, who published a report describing its use (Likert, 1932). Or it is method of ascribing quantitative value to qualitative data, to make it amenable to statistical analysis. Used mainly in training course evaluations and market surveys, Likert scales usually have five potential choices (strongly agree, agree, neutral, disagree, strongly disagree) but sometimes go up to ten or more. A numerical value is assigned to each potential choice and a mean figure for all the responses is computed at the end of the evaluation or survey. The final average score represents overall level of accomplishment or attitude toward the subject matter. It is named after its inventor, the US organizational-behavior psychologist Dr. Rensis Likert (1903-81).

The preceding arguments suggest that human and destination personality may share a similar conceptualisation, but they differ in how they are formed. Perceptions of human traits are inferred on the basis of a person's behaviour, physical characteristics, attitudes, and demographic characteristics. In contrast, perceptions of destination personality traits can be formed and influenced by the direct and/or indirect contact that the tourist may have with the destination.

Two types of product personality measurements can be identified as follows: idiographic (ad hoc) and nomothetic approaches. *The idiographic approach* is based on the belief that a product is single and well integrated unit. This approach aims to capture the uniqueness of each product, but it is often criticised because it does not lend itself easily to scientific measurement.

The *nomothetic approach* defines the product personality in terms of abstractions, or a collection of the distinctive traits of the product. This approach introduced measurement instruments to capture the personality of products.

Brand personality is multi-dimensional in nature, consisting of five dimensions: sincerity, excitement, competence, sophistication, and ruggedness. These five dimensions of brand personality measurements (BPM) are generic and could be used to measure brand personality across product categories and cultures.

Brand image is viewed as a cluster of attributes and associations that consumers connect to a brand. In this conceptualisation, evoked associations can be either hard (tangible/ functional attributes) or soft (emotional attributes). Brand personality is seen as the soft and the emotional side of the brand image.

Aaker (1997) defines brand personality as "the set of human characteristics associated with a brand". In addition to brand personality characteristics, researchers argue that brand personality includes demographic characteristics such as gender, age, and class.

Figure 3.4:   A Brand Personality Framework
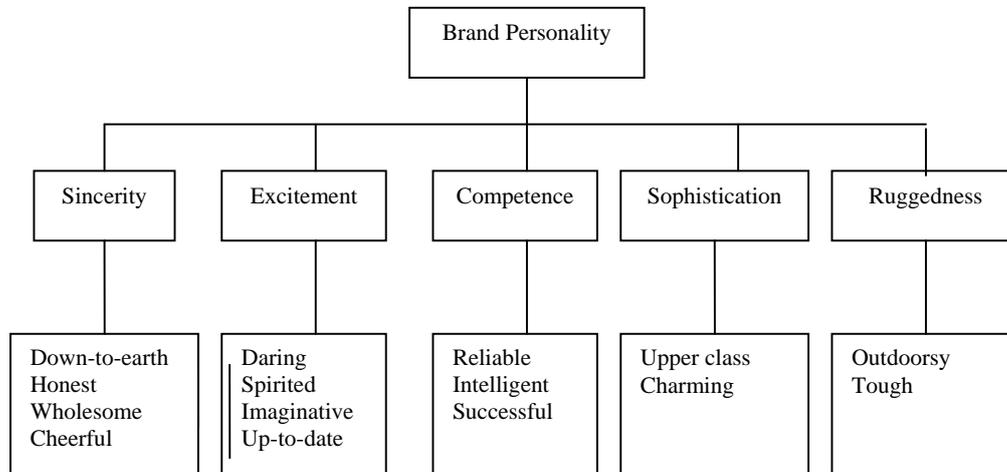
(Source: Aaker, 1997)

3.4.1.3.   Brand Identity

Brand identity addresses or examines destination brand from a supply-side perspective (Konecnik *et al*, 2007). The brand identity, destination brand supply-side perspective, is very important for destination branding for three main reasons; namely from a viewpoint of stakeholders' 'inclusive' decision making, it is becoming increasingly important to consider the potential effects and reactions to a destination brand identity strategy on leading opinion makers and, by extension, a host population at large. In the era of globalisation there is a renewed interest in the theme of identity, not in the least as an alternative viewpoint to the one-sided, demand –driven perspective on a tourism destination brand image, and as a consequence of the luring of disciplinary boundaries, including the social-, cultural-, historical- and natural sciences, there is a rising demand for theoretical perspective on the subject of place identity and a dearth of such knowledge, particularly among the smaller nations.

Brand identity serves as a link between destination image and destination branding (Cai 2002).   A tourist destination is a complex concept, which is based on a myriad of different products, services and experiences, managed by different stakeholders (tourism industry sector, public sector, DMOs and locals) with a variety of ownership forms and often without an appropriate hierarchy with a set of rules to which stakeholders adhere.   With such a

context, a brand identity can serve as a network picture, which draws in turn, on historical, national and cultural relationships to develop a common view, and then becomes the basis for joint action for/or against change.

The tourism destination brand identity system represents the process of developing a destination brand identity, which incorporates relevant local cultural characteristics. The destination brand identity dimensions can be summarised by four brand characteristics: brand as a product, brand as a symbol, brand as an organisation and the brand as a personality.

Brand identity includes the following: competitor analysis, tourists' analysis, self analysis and visual analysis (Konecnik *et al*, 2007). Competitor analysis refers to systematic investigation of competitors and, drawing from the comparison and the taking further of strategic actions.

De Chernatomy and Harris (2001) present a brand management model and conceptualise the process which enables the narrowing of the gap between the brand identity and the brand reputation. According to the model brand identity consists of six items, i.e. vision and culture, which drive a particular brand's desired positioning, personality and subsequent relationships reflecting stakeholders' self images. They further propose that common and coherent perceptions of the brand identity correlate positively with the success of a particular brand.

3.4.2. DESTINATION BRANDING THEORETICAL FRAMEWORKS - COMPONENTS, MODELS, STAGES AND BRAND BENEFIT PYRAMID

This section outlines the theoretical destination branding frameworks, which includes the components of branding, destination branding models, steps or phases in destination branding and destination brand benefit model.

3.4.2.1. The Components of Branding

Kaplanidou *et al* (2003) assert that branding is not just a logo or a trademark. It incorporates many components that work together to form the destination brand concept. Management of these destination concepts is part of the brand strategy. In Figure 3.5 below the most

important components of the destination brand are depicted. All the components of branding, as outlined below, communicate that a destination brand is about a promise to the potential visitor/tourist to deliver a positive experience on its distinctive elements.

Figure 3.5: The Components of Branding

Brand character is related to its internal constitution, how it is perceived in terms of integrity, trustworthiness and honesty. This is also related with the promise of the brand to deliver the

Brand image is a key component in the formation of a clear recognizable brand identity in the market. **Brand image is related to how the brand is currently perceived by consumers**. In other words what is the reputation of the brand in the

Brand culture is about the system of values that surround brands much like the cultural aspects of a people or a country.

Brand Identity is how the brand strategists want the brand to be perceived. It is a set of unique brand associations that represent what the brand stands for. These associations imply a promise to customers from organization members Brand identity should help establish a relationship between the brand and the customer by generating a value proposition involving functional emotional or self expressive

Brand personality is the set of human characteristics that are associated with the brand. It includes such characteristics as gender, age, socio-economic class, as well as human

Brand essence or brand soul represents the emotional elements and values of the brand. Essence should be part of a long term positioning that does

(Source: Kaplanidou *et al*, 2003)

3.4.2.2. Destination Branding Models

Cai's (2002) model of destination branding considers destination branding as a recursive process that revolves around the central axis formed by brand element mix, brand identity, and the brand image building. The process starts with careful choosing of one or more brand elements to serve as trademarkable devices. Whether slogans or logos distinctly identify the destination and begin the formation of strong and consistent brand associations that reflect the attributes, affective and attitudes components of an image. In this model, image formation goes beyond the tourist-oriented approach to encompass what image a DMO wants to project. Associations are considered secondary in destination branding when this relationship with a place as perceived by tourists does not result from the DMO's direct marketing programmes and communications, and are usually beyond its direct control.

While secondary associations are not controllable, they can be borrowed, leveraged and managed to supplement the intended image building to the extent that the benefits spreading activates and consequently enhances the brand identity of the destination. The four components on the model's outer circle specify the contextual pre-conditions in which destination branding takes place.

Like the figure 3.5 in section 3.4.2.1 above, the section has more or less similar elements with the section above. Kolb (2006) identified the two significant models the destination marketers have to follow during their destination branding process, namely emotional branding and iconic branding.

The emotional branding model suggests that marketers build a brand around a specific lifestyle. An emotional brand for an expensive destination communicates a feeling of status and luxury. Besides communicating brand emotions, the purpose of the emotional branding is to develop a relationship with consumers who are attracted to a particular lifestyle (Kolb, 2006).

Figure 3.6: Destination Branding Models
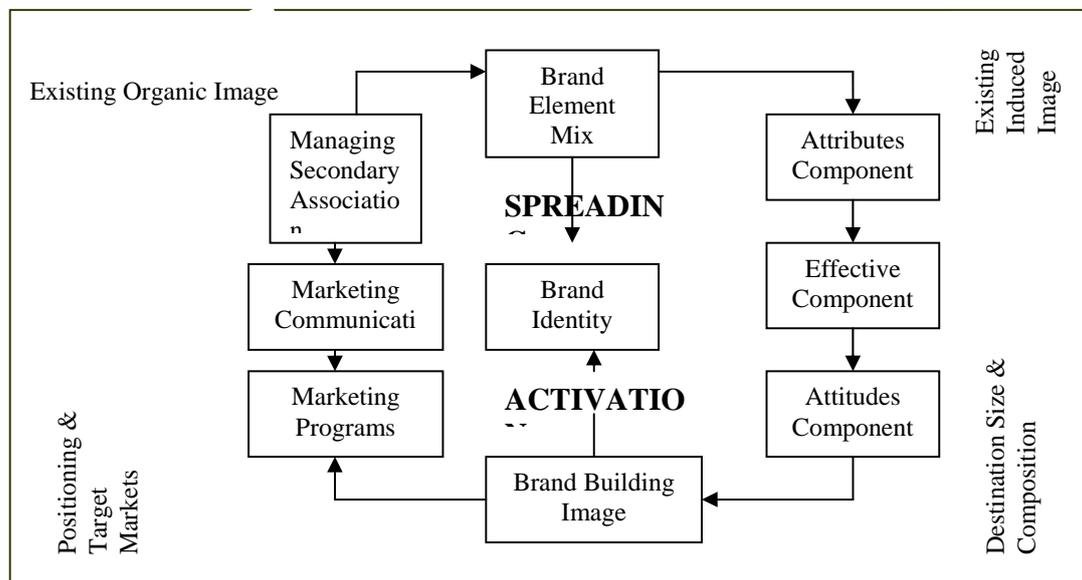
(Source: Cai, 2002)

The iconic branding model introduces the idea of building not just emotion but an entire identity around a brand. This brand identity will correspond to a person, symbol, or

movement that is positively considered. A city could develop an iconic brand by associating their city with a particular person (Holt, 2004).

3.4.2.3. Steps or Phases in Destination Branding

Morgan *et al* (2002) developed a five phase destination model. This model identified the process of establishing core values of the destination and its brand as the first stage in the process of building and refreshing any destination brand. This model has some similarity with the components and models of the destination branding identified above.

Table 3.2:   The five Steps or Phases in Destination Brand Building

Phase One	Market investigation, analysis and strategic recommendation
Phase Two	Brand identity development
Phase Three	Brand launch and introduction – communicating the vision
Phase Four	Brand Implementation
Phase Five	Monitoring, evaluation and review

(Source: Morgan *et al*, 2002)

3.4.2.4   The Destination Brand Benefit Pyramid

Brand benefits pyramids sum up the consumers` relationships with a brand and are frequently established during the consumer research process where consumers are usually asked to describe what features a destination offers and what the place means to them. Using research, it should then be relatively straightforward to ascertain what particular pyramids consumers associate with the destination in question. The benefit pyramid can be instrumental in helping to distil the essence of a destination brand's advertising proportion. This refers to the point at which the consumers´ wants and the destination's benefits and features intersect, any communication (through advertising or public relations) should then encapsulate the spirit of the brand. While many ideas may be suggested initially, the challenge is to develop a proposition which makes the destination brand relevant, contemporary and appealing (Morgan *et al*, 2002).

Figure 3.7: The Destination Brand Benefit Pyramid

Level 5.
What is the
essential
nature and
character of
the
destination
brand?

Level 4.
What does value mean for the typical
repeat visitor?

Level 3.
What psychological rewards or emotional benefits do tourists
receive by visiting this destination?
How does the tourist feel?

Level 2.
What benefits do the tourist get from this destination's features?

Level 1.
What are the tangible, variables, objectives, and measurable characteristics of this
destination?

(Source: Morgan *et al*, 2002)

3.4.3. FUNCTIONS (ROLE) AND CHALLENGES OF BUILDING A DESTINATION BRANDING

Like a product brand, a destination brand also has a significant role it plays for the destination marketers and the destination itself. Ooi (2004) identified the following functions that destination marketers expect from a destination brand:

- A destination brand is expected to shape perceptions of the tourists about the destination positively and ensure repeat visit to the destination by the tourists as well as referring the destination to friends and relatives.

- Through a destination brand, the destination is packaged selectively and aesthetically. It further carefully enlightens the destination's key attractions and tourist sites such as wildlife and beaches to the potential tourists.

- Through the destination brand, destination marketers showcases the destination's uniqueness. This makes it easier for the destination to effectively compete against other global players in attracting tourists.

Despite the fact that a destination brand perform splendid task for the destination, building such a brand presents many challenges (Morgan *et al*, 2001). Tasci *et al* (2004) further assert that due to the unique characteristics of the tourism industry, branding in the tourism industry has its own unique challenges. Below are challenges the destination marketers encounter during the destination branding process.

- Building a destination brand involves a dynamic and extensive process of drawing support and cooperation from various stakeholders within the tourism industry such as government, industry and local residents. If such a robust consultation process has not been followed through the destination brand will not be accepted, communicated and manifested through official and unofficial publicity and products (Ooi, 2004). The successful destination branding is about achieving a balance between applying a cutting-edge advertising and public relations approach to a marketing problem and the managing of local, regional and national politics.

  Ideally the process of developing the city's image into a brand should involve the participation of a great many people and institutions, including government, officials, existing tourism agencies, tourist attractions, managers of cultural venues, university officials, civic organizations, entertainment and hospitality managers, and members of different community groups and neighbourhoods (Kolb, 2006). This is a long and time consuming challenge at city and country level. For SADC, where there are 14 Member States, private and public institutions the consultation process will be more immense. This challenge of destination branding is called politics of destination branding.

- Owners of destination products (accommodation establishments etc) mainly belong to the individuals. As a result, destination marketers have relatively little control over the different products and a diverse range of areas and components in the task of crafting brand identities (Morgan *et al*, 2001). It is therefore difficult to brand a product that is entirely individually owned or controlled. The success of branding such a product will require a complete buy-in of the owners of such products. This challenge is called amorphous nature of destination product.

- Most national, regional and city tourism organizations are wholly funded by the government. As a result they operate within a limited budget and yet they have to market globally, competing with not just other destinations but also with other global brands

(Morgan, 2004). Most destination marketers are facing extremely limited budgets by comparison with marketers of many consumers' goods and services. Due to limited budget development of a proper destination brand will be difficult and in most cases impossible.

3.5. PRODUCT AND DESTINATION BRAND BUILDING TOOLS

Destination and product brand building practitioners use various tools to build the brands such as sponsorship, information and communication technologies (ICT), electronic media (radio and TV) as well as print media (newspapers, magazines). This involves constant communications of the destination and product's attributes to the consumers. A lot has been written about electronic and print media and for the purpose of this section only sponsorship and ICT tool will be focused on. It does not mean that the other tools are not important at all.

3.5.1. SPONSORSHIP

Sponsorship is an activity where the brand building practitioners provide financial or non-financial support to a particular event in return for the organisation or product's publicity. The purposes of the sponsorship are to build brand awareness (create exposure for the brand), to enhance the worldwide imagery and attitudes towards the brand (develop associations), mobilizing the organization for brand building, providing an event experience to customers, and demonstrating new product or technologies (Aaker *et al*, 2000).

Sponsorship has the potential to contribute to brand building in the following ways – mobilizing the organization for brand building (Making the sponsorship successes require an enormous effort to share information and coordinate advertising and promotions worldwide), providing experience (an event experience can provide a customer with a unique opportunity to develop a link to the brand and its organisation), demonstrating new product and technologies (A sponsorship can be the necessary lever to elevate the news value of a product or technology so that press coverage results. As a bonus, the visibility of the product or technology can also enhance the link between the brand and the event), creating brand exposures (The cost of the sponsorship can be justified solely by the brand name exposure achieved through event publicity or signage), developing brand associations (Sponsorship assists the brand building practitioner or organisation to raise association among a target

segment) and lastly, becoming part of an event/ customer bond (the brand would likely need to be tightly associated with a named team or event over an extended period of time, the activity would have to be an involving part of people's lives).

Figure 3.7: Developing Brand Associations through Sponsorship

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┌─────────────────────────────────────────────────────────────────────┐
│  ┌──────────────────────┐                 ┌──────────────────────┐   │
│  │  Sponsored property  │──────────────▶  │  Desired associations│   │
│  │     (World Cup)      │                 │ (global, excellence, │   │
│  │                      │                 │       energy)        │   │
│  └──────────────────────┘                 └──────────────────────┘   │
│              │                                        │               │
│              │        ┌──────────────────────┐       │               │
│              └──────▶ │        Brand         │ ◀─────┘               │
│                       │     (MasterCard)     │                       │
│                       └──────────────────────┘                       │
└─────────────────────────────────────────────────────────────────────┘
```
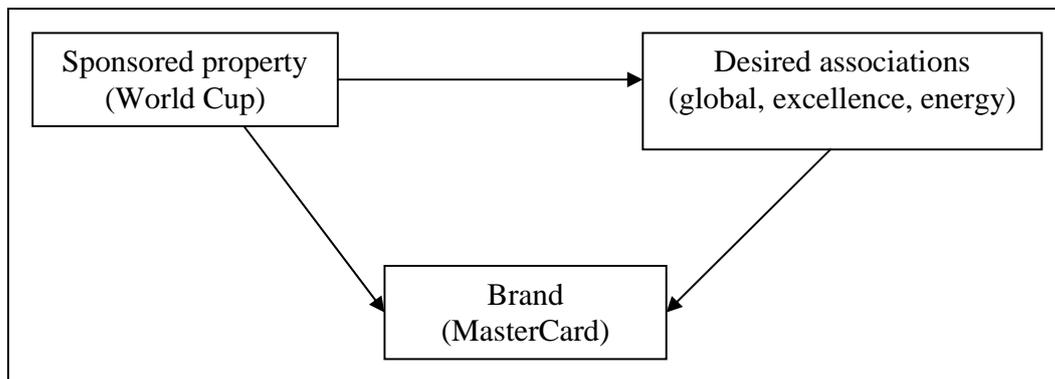
(Source: Aaker *et al*, 2000)

For a sponsoring organisation to fully benefit from sponsoring a particular event, the following key guidelines should be followed in order to improve the chances of effective sponsorship experience: Have clear communication objectives for the Brand (visibility/ awareness, association development, and relationship development), be proactive (The sponsorship selection however needs to be managed proactively by developing a set of criteria for the ideal sponsorship, then listing possible choices that score well on these criteria), look for exceptional fit (An exceptional fit between the event and the brand is much better than a good fit and a forced fit or lack of fit is a significant handicap), own sponsorships (The real key to success is to own the sponsored event over time and not just during the event. Event ownership has the following implications: consider focusing on one or few events rather than forming a lose association with many, go for long term relationships and contracts; beware of situations where, if it works out well, a competitor can move into your place, consider a named sponsorship, beware of sponsorship clutter and insider the threat to ambush marketing and, have a plan to deal with it), look for publicity opportunities (Publicity will make the task of achieving brand-building objectives more effective and efficient), consider multiple sponsorship payoffs (The sponsorship can achieve meaningful brand-building objectives in other ways – by providing event experiences to key customers, by demonstrating new products, by mobilizing the organization for brand building, and by interjecting the brand into the event/customer brand. Strong brands with larger financial

resources benefit more from sponsorship, small brands are at disadvantage) and finally, actively manage the sponsorship

> (An effective sponsorship does not just happen – goals need to be set, programs put in place to achieve the goals, and the results measured. Active management also means the involvement of the extended organization)

Figure 3.8: Sponsorship Evaluation Matrix

(Source: Aaker *et al* 2000)

The figure shows that if the sponsor evaluates the sponsorship, the results should be a box 2 which indicates high on both brand identity fit and interactivity/involvement. At box 3, the company should consider discontinuing its sponsorship because of low on both brand identity fit and interactivity/ involvement.

3.5.2 INFORMATION AND COMMUNICATION TECHNOLOGIES

Bennett & Randburn (1991) define information technology (IT) as a collective term given to the most recent developments in the mode (electronic) and the mechanism (computers and communication technologies as well as software which drive them) used for the acquisition, processing, analysis, storage, retrieval, dissemination and application of information. The tourism industry has proved particularly suitable for the adoption of IT because of its dependence upon the supply and exchange of information throughout the production and distribution chain. Bennett *et al* (1991) goes further by suggesting that there is not just one type of IT but a whole system of information technologies.

There are three systems used by travel agencies which underline the importance of the information technology within the tourism industry, namely viewdata or videotext (Viewdata or videotex represents the marrying together of a screen to display information and the telephone network to transmit information from central computer), computerised reservation system (CRS) (These systems enable travel agents to interface with a variety of principals' computers to book airline seats, car hire, rail, ferry services, hotels, theatre tickets and ski equipment rental, as well as numerous other information services) and 'back office' systems (back office systems basically perform the administrative, accounting and ticketing functions). Combining these systems enable travel agents to store private information, create client profiles and itineraries and undertake invoicing, ticketing and word processing (Bennett *et al*, 1991).

Despite the World Wide Web's (WWW) relatively recent arrival on the consumer landscape, it has had a major impact on brands and brand building. The strong brands of the digital age will be those that best utilise the Web as a building tool. The Web reaches people never exposed to western media. The Web is also in a high-growth mode with respect to its influence on business models and its impact in communication. Web is glue that brings the total communication efforts together (Aaker *et al*, 2000). In addition to its impact on the brands and brand building, Kaplanidou *et al* (2004) indicate that the use of the internet among the online travellers is increasing. They assert that the overall website quality is perceived as the results of three design/technological elements, namely navigation, technologically creativity (content) and accessibility. These elements contribute to the overall website quality (Evans & King, 1999; Doolin, Burgess & Cooper, 2002; Gretzel, Yaun & Fasenmaier, 2000).

A good navigation system is a necessity of successful website design (Kuegler, 2000). Navigation is a successful movement through a website's pages. A good navigational design includes a list of major sections that can be reached easily from the home page and any other page (Kaplanidou *et al*, 2004).

Content is the form of text and is considered to be very important for the Internet since it was initially developed to exchange information ((Kaplanidou *et al*, 2004). Evans *et al* (1999) indicate that a website should have content that satisfy the user and it should be updated at least monthly. Head (1999) further indicates that content is the "King" when compared to

other website characteristics since usability studies have shown that when a page comes up, the user looks right in the middle for content.

Kaplanidou *et al* (2004) conceptualised the accessibility of the website as the ability of the user to easily find a website in the World Wide Web, as well as how fast the website and its web pages download. All the elements outlined above collectively help in the development of a destination brand.

Figure 3.9: World Internet Users by Continent/ World Regions
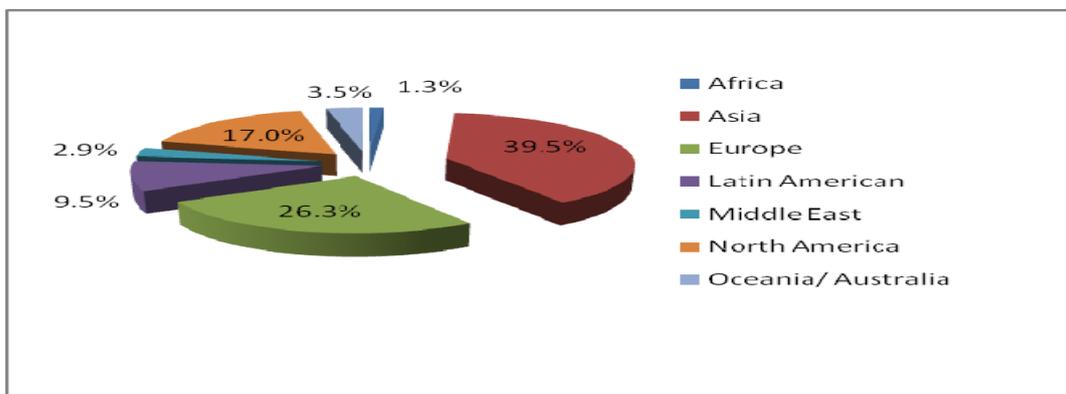
(Source: Internet World Stats, 30 June 2008)

Figure 3.9 shows the world internet users by world regions or continents. The said figure shows that Europe and Asia accounts for more than 65% of the internet users in the world. The highest number of users of internet in Asia and Europe might be attributed to the highest level of market penetration as well as the rapid growth of Asymmetric Digital Subscriber Line (ADSL) and wireless broadband services. The North America is the third largest user of the internet after Asia and Europe. Africa accounts for only 3% of the world's internet users. Even though the North Americans are the third largest users of internet in the world, the population penetration is the highest in the world (73.6%). Africa with the smallest penetration rate has shown a significant growth (+1,031.2%) in the number of users between 2000 & 2008. This is fuelled by rapid growth in ADSL and wireless broadband services. But the overall market penetration is still low, leaving ample room for the growth in the coming years.

Table 3.3: World Internet Usage and Population Statistics

World Regions	Population (2008 Estimates)	Internet Users 31 Dec 2000	Internet Usage, latest Data	% Population Penetration	Usage % of World	Usage Growth 2000 - 2008
Africa	955,206,348	4,514,400	51,065,630	5.3	3.5	1,031.2
Asia	3,776,181,949	114,304,000	578,538,257	15.3	39.5	406.1
Europe	800,401,065	105,096,093	384,633,765	48.1	26.3	266.0
Middle East	197,090,443	3,284,800	41,939,200	21.3	2.9	1,176.8
North America	337,167,248	108,096,800	248,241,969	73.6	17.0	129.6
Latin America/Caribbean	576,091,673	18,068,919	139,009,209	24.1	9.5	669.3
Oceania / Australia	33,981,562	7,620,480	20,204,331	59.5	1.4	165.1
WORLD TOTAL	**6,676,120,288**	**360,985,492**	**1,463,632,361**	**21.9**	**100.0**	**305.5**

(Source: Internet World Stats, 2008)

Aaker *et al (2*000) identify six tools of building brands on the Web such as website, advertising and sponsored content, e-mail, web PR, customer extranet & intranet:

- Website is potentially the most powerful brand-building tool, in part because it can be tailored to the needs of the brand and the customer/brand relationship,

- Advertising and Sponsored Content is a banner advertisement and other paid web placement of creative visuals, messages, and experiences can provide visibility and association and also stimulate people to click through to particular websites,

- Intranet is generally a system of private websites connecting people within an organization, as well as its partners and it provides a key role in communicating the brand and its brand identity internally,

- Customer extranet assists the organization to build a brand by delivering enhanced service but also vividly reinforces the organization's core identity associations of efficiency and responsiveness,

- Web PR involves web communication not controlled by the brand, such as personal home pages, news-or-gossip-oriented sites, discussion groups, and chat rooms and finally, and

- E-mail is a powerful tool to brand builders and serves to create connection, and at the same time, remind the customer about the brand and its relationship with the customer.

Table 3.4 shows the internet usage statistics for the SADC region for 2008. The figure shows that Seychelles has the highest penetration rate in the region followed by Mauritius and South Africa.

Table 3.4: Internet Usage Statistics for the SADC region

SADC Member States	Internet Users Dec 2000	Internet Users Latest Data	Use Growth (2000-2008)	% Users in Africa	Population (2008 Estimates)	Penetration (% Population)
Angola	30,000	100,000	233.3 %	0.2	12,531,357	0.8
Botswana	15,000	80,000	433.3 %	0.2	1,842,323	4.3
DRC	500	230,400	45,980.0 %	0.5	66,514,506	0.3
Lesotho	4,000	70,000	1,650.0 %	0.1	2,128,180	3.3
Madagascar	30,000	110,000	266.7 %	0.2	20,042,551	0.5
Malawi	15,000	139,500	830.0 %	0.3	13,931,831	1.0
Mauritius	87,000	340,000	290.8 %	0.7	1,274,189	26.7
Mozambique	30,000	200,000	566.7 %	0.4	21,284,701	0.9
Namibia	30,000	100,100	233.7 %	0.2	2,088,669	4.8
Seychelles	6,000	32,000	433.3 %	0.1	82,247	38.9
South Africa	2,400,000	5,100,000	112.5 %	10.0	43,786,115	11.6
Swaziland	10,000	42,000	320.0 %	0.1	1,128,814	3.7
Tanzania	115,000	400,000	247.8 %	0.8	40,213,162	1.0
Zambia	20,000	500,000	2,400.0 %	1.0 %	11,669,534	4.3 %
Zimbabwe	50,000	1,351,000	2,602.0 %	2.6 %	12,382,920	10.9 %

(Source: World Internet Stats, 2008)

3.6.   DIFFERENCES AND SIMILARITIES OF BRANDING A PRODUCT AND A DESTINATION.

Ooi (2004) asserts that the differences in branding place-products and commercial organizations and manufactured products/services are largely ignored and similarities between them, on the other hand, are accentuated. The focus of this section is to fully highlight the differences and similarities between destination and product branding. Since there is no current literature on the regional destination branding, assumption in some cases will be made that a country scenario might also apply in a regional basis.

However, unlike typical goods and services, the name of a destination brand is relatively fixed by the actual geographical name of the place. The first and arguably most significant, destinations are far more multidimensional than consumer goods and other types of services. A destination includes diverse and often eclectic range of natural resources, built attractions, culture, activities amenities and accommodation (Pike 2005).

Destination branding organisations (DMOs) normally deal with far large numbers of stakeholders during the brand building than the product and service branding specialists have to deal with. The challenge with the number of stakeholders involves creating a time lag in effecting inputs to the proposed brand as well as level of understanding. Local participation in place branding processes indicates a certain level of attention among place branding theorists towards the difference existing between branding places and branding conventional products. Creating brands in relation to locations is a more complex process than in the use of more mainstream products and services. Therkelsen and Halkier (2004) further indicate that branding of destinations involves a multitude of stakeholders and accompanying interests such as the national, regional and local authorities and provide diverse sectors such as hospitality and tourism. Kotler *et al* (1999) also allude that the production of a place brand is based on inter-organisational negotiations and consensus building among the three types of stakeholders – local/regional/national government, the business community and citizens whereas the branding of commercial products only involves one or very few individuals and mainly the owner. .

The destination marketers usually face a more complex decision making process during the branding process as compared to the marketers of commercial products. The destination branding involves a larger area, choices of the icons or attractions to the market, and interactions among many levels of the destination branding process. Due to the complexity of the process, destination marketers might take longer to make branding decisions. Unlike other tangible products, tourists are not able to "test drive" and try a destination before making a choice. The challenge again with destination branding has to do with the complexity of the decision making process on the part of a tourist (Cai, 2002).

The market interests of the diverse group of active stakeholders are heterogeneous (Pike, 2005). Counter to a market orientation where products are designed to suit market needs, DMOs are forced into targeting a multiplicity of geographical markets to attract a wide range of segments for their range of products, most of which are rigid in what they can be used for as compared to the marketers of commercial products.

Destination branding targets many different customers with widely different needs and demands which is unique in comparison with commercial product brands. Product branding

depends on how the destination is perceived in the world, if whatever is produced in the other country is perceived as a good quality people will definitely buy. Country images are likely to influence people's decisions related to purchasing, investing, changing residence and travelling (Kotler *et al*, 2002).

A national brand can behave just like a manufacturer brand, providing an umbrella of trust, a guarantee of quality, and set of ready-made lifestyle connotations which kick-start the entry of its new "sub-brands" to the market place (Anholt, 2002).

Country of origin has become an integral part of the repertory of extrinsic cues to product evaluations, along with price, brand name, packaging and seller, as opposed to the study of the role on intrinsic qualities of the product such as materials, design, style, workmanship, colour, and smell. Country-of-origin studies have been developed for a variety of durable and non-durable consumer products, including cars, electronics, apparel, smoke detectors, and pickles. Finding consistent support in the fact that consumers pervasively use country-of-origin information is an indicator of quality. The need to attract tourists, factories, companies and talented people and to find markets for their exports requires that countries adopt strategic marketing management tools and conscious branding. A great deal of empirical research has attested that country images are important extrinsic clues in product evaluations. They are familiar, they elicit associations and they can influence product evaluations and purchase decisions (Kotler *et al*, 2004).

During the process of determining a destination brand there is a lengthy consultation process, whereas in the commercial environment the executives of the company, mainly the Chief Executive Officer, make presentations before the Board of Directors for approval or adoption. Ooi (2004) asserts that during the destination branding process negotiations take place between different stakeholders: national tourism authorities, sub-national tourism authorities, tourism attractions, domestic tourism businesses and non-tourism businesses. Besides communicating positive messages the brand images and story, one must also deliver the products and mobilise local support for the brand.

The other challenges of the destination branding authorities are:
- Unlike a firm where managers can fire workers if they do not tow the company's line, destination branding authorities cannot fire those citizens who do not embrace the official

destination branding, or can the authorities normally close sub-national tourism authorities and private enterprises if they refuse to cooperate with branding campaigns,

- But like a firm that tries to increase the morale of its workers, many tourism authorities engage in programs to warm and mobilise locals and local enterprises towards the brand,

- Politicians and local residents may not be supportive of changing their country so that it attracts more tourists, and

- Commercial firms are profit maximization entities and most do not have direct access to public funds, and they are not expected to carry heavy social and cultural responsibilities in a society. However, in the branding of countries, state supported tourism authorities and their agendas are explicitly and closely tied to the domestic, social, cultural and political issues (Ooi, 2002a).

It will always be easier to brand individual products than nations for the well-argued reason that the image of a product brand is limited to a controlled number of attributes whereas the images of a nation tend to be dependent on the situations to which they are instantiated (Gnoth, 2002). Building a destination brand involves the inclusion and consideration of all stakeholders throughout the lifetime of destination and brand (Gnoth, 2002).

A destination clearly differs from other products in that it is not a single product at all, but a composite product consisting of a bundle of different components, including accommodation and catering establishments, tourist attractions, arts, entertainment and cultural events, and natural environment. Destination marketers have relatively little control over these different aspects of their product, and a diverse range of agencies and companies are partners in the task of crafting brand identities (Morgan *et al*, 2002).

The similarities between the destination and branded products can offer the same consumer benefits as other more highly branded lifestyle accoutrements such as cars, perfumes, watches and clothes (Morgan *et al*, 2002). Both brands use more or less similar brand building tools to build and maintain their brands. Again both products and destination brands have similar consumer benefits of increasing the value for the consumer. Funding is often a continuous problem for the DMOs, in both scale and consistency as compared to the commercial organisations. Since DMOs have no direct financial stake in visitor expenditure, they continually lobby for public and private funding (Pike, 2005).

3.7. CHALLENGES AND BENEFITS OF BUILDING A REGIONAL DESTINATION BRANDING

The purpose of this thesis is to build a regional destination branding for the SADC region. Since literature on regional destination branding is non-existent, this section will use the destination theory at city, regional and country level to make assumptions about the regional destination branding. The first and foremost assumption is that challenges experienced at city, regional and country level will be far more at the regional level.

As outlined in the earlier section of this chapter, challenges facing destination brand marketers include amongst others the following, namely multidimensional products, limited budget, required stakeholder consultations, wide and diverse market interests.

Stakeholders in the destination include national tourism authorities, sub-national tourism authorities, tourism attractions, domestic tourism businesses and non-tourism businesses. For the SADC region, it means that everything should be multiplied by fifteen. This will make the process of destination branding very long and tedious. Since countries within the SADC region are at different levels of development it might be difficult for other Member States to contribute financially and also skills in the regional brand building process.

Despite the challenges, regional destination branding will bring number of benefits for the SADC region as well as the visitors or tourists such as market exposure for the smaller destinations within SADC, bigger tourism plant for the tourists and increased budgets due to joint marketing efforts.

3.8. SUMMARY AND CONCLUSION

The literature on branding a product as well as the branding of a tourism destination has been reviewed in this chapter. The literature on branding shows that branding itself is older than the theory of destination branding. The differences, similarities, challenges and shortcomings as well as techniques, steps and tools in branding a product and tourism destination were considered in order to address the second objectives of the study.

According to this chapter the concept "destination" does not only refer to a physical place but it also includes the cultures of the people and destination attractions. The concept of branding has been applied extensively in products and services such as cars etc as compared to tourism branding. The chapter has further shown that the term "branding" has been in existence for many centuries ago and it has been widely studied and researched as compared to the destination branding.

The chapter has further shown that the development of a destination brand is not only about the creation of a logo and tagline but also include a reflection of the people and culture of a particular destination, the things that make them unique, and the things that cannot be duplicated by competitors.

Destination brand development is faced with many more challenges than a product brand has. It is clear that there is a distinct difference between branding a product and branding a tourism destination. The analysis of destination branding practices presents an opportunity to attempt to assist developers and planners of regional branding within the SADC region. In the SADC region almost all the countries have recognized the significance of destination branding but this is limited to their countries and not for the entire region.

The challenge of building destination brand as discussed above refers only to a particular city/region/country which has fewer stakeholders as compared to SADC. The previous chapter showed that SADC has fourteen Member States which each has an average of six provinces, and varying numbers of tourism regions and cities. To be able to get this large number of stakeholders to agree and support a single tourism brand will be a huge task. The other challenge is that these countries are at different levels of development and in some of them tourism is not a key economic sector. As a result, they will not be able to contribute or be committed to the destination branding initiatives.

Before the regional destination branding framework for SADC is proposed in chapter 5, the following chapter, chapter 4, will discuss the regional destination branding development within the ASEAN and it will also outline the lessons that SADC could learn from this example. The information contained in this chapter will serve as a critical input to the development of a regional branding framework in chapter six.

CHAPTER 4
ASSOCIATION OF SOUTH EAST ASIAN NATIONS (ASEAN) AND ASEAN TOURISM ASSOCIATION (ASEANTA) – POSSIBLE LESSONS FOR SADC

4.1. INTRODUCTION

The Association of Southeast Asian Nations' (ASEAN) regional destination brand has been in existence since the 1980s. Since then the performance of the ASEAN's tourism industry has been growing phenomenally, this is partially attributed to the fact that the destination is has been promoted and marketed as a single destination to the tourists both at regional and international levels. As a result, the ASEAN region has been selected as the subject of a case study to examine the possible lessons that the SADC region could learn from in terms of developing regional destination branding. In this chapter the third objective of the study as stated in paragraph 1.4.3 of chapter 1 is critically assessed. The chapter begins by providing a historical background of the of the study area. The chapter further provides a general overview, objectives, goals and challenges of establishing the Association of Southeast Asian Nations (ASEAN) and ASEAN Tourism Association (ASEANTA), and also various attempts made to organise the region to jointly promote herself as a single tourism destination are outlined. The reasons why the ASEAN region is selected as a possible case study where the SADC region could learn from are also explained in detail in this chapter.

Various regional tourism promotion agreements, the significance of the protocol in promoting the region as a tourism destination will be also is looked at. Various promotional campaigns by individual countries are also outlined in this chapter.

4.2. THE ESTABLISHMENT OF THE ASSOCIATION OF SOUTHEAST ASIAN NATION (ASEAN) REGION

The Association of Southeast Asian Nations (ASEAN) was founded after the founding Member States signed a Declaration on the 8[th] August 1967, as a protective measure against the rising threat of communism in the region (Timothy, 2003), while the SADC in region reviewed in chapter 2 was established as protective measure against colonialism, racism and white majority role. Thus the origin of the two regions, SADC and ASEAN, was purely politically motivated. The founding members of the ASEAN are Thailand, Philippines,

Malaysia, Indonesia and Singapore (Broinowski, 1982). The ASEAN is a predecessor of the Association of Southeast Asia (ASA) founded on the 31st July 1961 by Malaya, Philippines and Thailand as well as Maphilindo formed in July/August 1963 by Malaya, Philippines (Broinowski, 1982). To date, the ASEAN has a total of ten Member States after Brunei Darussalam, Cambodia, Laos, Myanmar and Vietnam joined the founding members of the Association. Each additional member state joined in their own times as follows: Brunei Darussalam (8th January 1984), Vietnam (28th July 1995), Laos and Myanmar (23rd July 1997), and Cambodia (30th April 1999). This means that Cambodia is last born of the Association (ASEAN Secretariat, 2006). The purpose of this grouping is to provide a more co-operative basis for intra-regional relationships (Broinowski, 1982).

The ASEAN Declaration states that the aims and purposes of the Association are, to accelerate economic growth, social progress and cultural development in the region, and to promote regional peace and stability through abiding respect for justice and the rule of law in the relationship among countries in the region and adherence to the principles of the United Nations Charter (ASEAN Secretariat, 2006). The Association's goal is to create a stable, prosperous and highly competitive ASEAN economic region in which there is a free flow of goods, services, investment and a free flow of capital, equitable economic development and reduced poverty and socio-economic disparities in the year 2020 (ASEAN Secretariat, 2006).

The ASEAN Member States has agreed to the establishment of an ASEAN Community by 2015 (ASEAN Secretariat, 2007). In moving towards the ASEAN Economic Community, ASEAN has agreed to accelerate regional integration in the following priority sectors by 2010: air travel, agro-based products, automotives, e-commerce, electronics, fisheries, healthcare, rubber-based products, textiles and apparels, tourism, wood-based products and logistics (ASEAN Secretariat, 2006). The tourism sector is amongst the twelve sectors prioritised above, this reflect the seriousness of the Association about the sector.

4.3. PHYSICAL CHARACTERESTICS OF THE ASEAN REGION

The ASEAN region is situated within the continent of Asia (see figure 4.1). The ASEAN region's Member States are located between the great culture worlds of India and China historically seen as a swirl converging migrant communities (Broinowski, 1982). The ASEAN region is approximately 4.86 million square kilometres, almost half of the size of the

SADC region, in size, with a population of about 900 million (2005), almost 700 million more than the SADC region's population. This means the ASEAN region is densely populated as compared to the SADC region. The SADC region has competitive economic advantage as compared to the ASEAN region because it has large area available for economic activity as compared to the ASEAN region. The combined GDP of the ASEAN region is almost US$ 700 billion, and a total trade of about US$ 850 billion. The ASEAN region stretches from the south of China up to the north of Australia.

Figure 4.1: Map of Southeast Asian Nations region
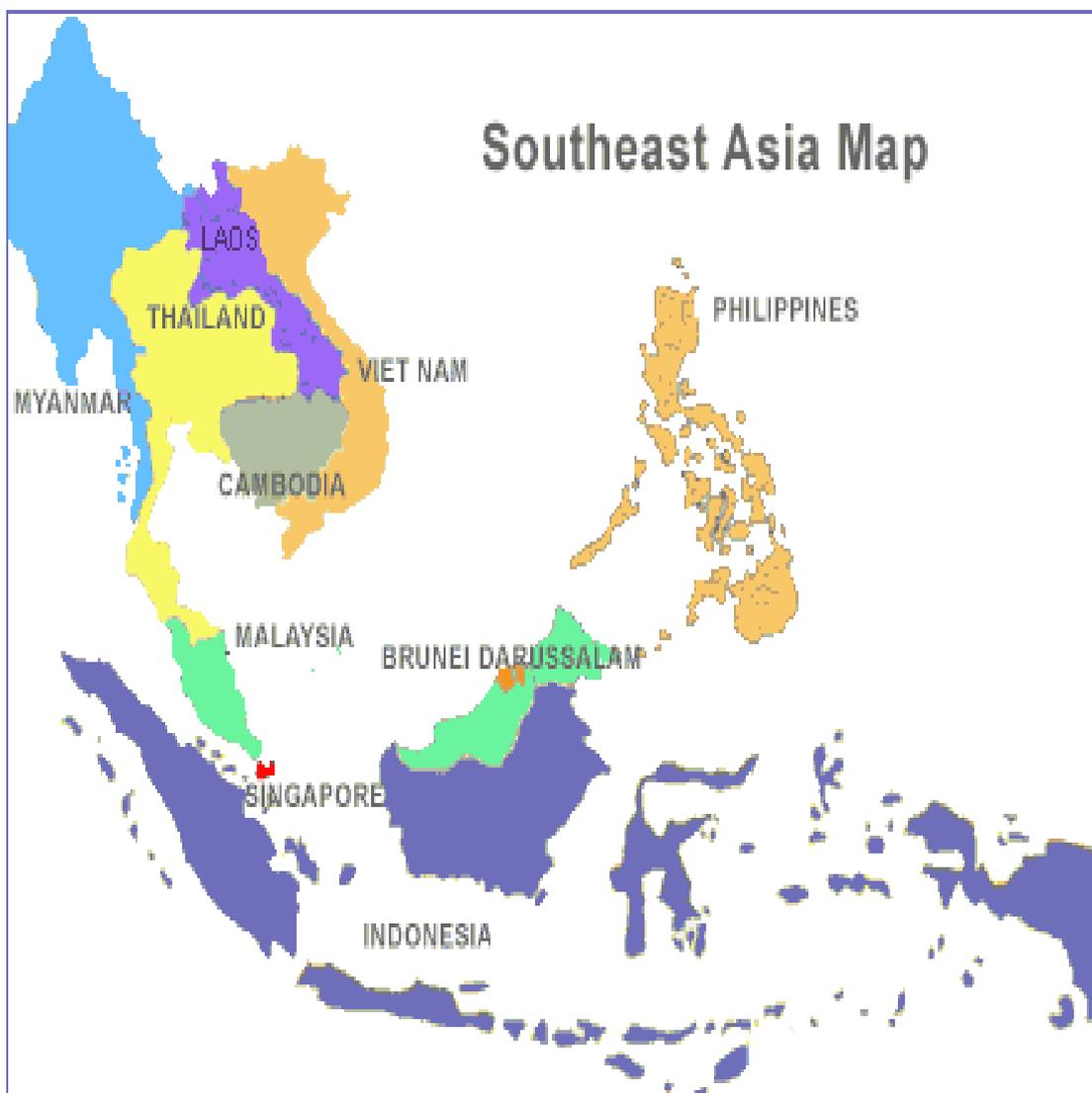
(Source: ASEAN, 2008)

Indonesia covers the largest land area of the ASEAN region followed by Vietnam, and Myanmar while Singapore is the smallest of the ASEAN Member States (see table 4.1). This is in terms of both the size of the land area as well as the population.

Table 4.1:   Land Area and Population of the ASEAN Member States

Country	Land area (Sq. km)	Population (000) 2005
Brunei Darussalam	5,765	370,1
Cambodia	181,035	13,661
Indonesia	1,890,754	219,205
Laos	236,800	59,389
Malaysia	330,257	26,389
Myanmar	676,577	56,003
Phillipines	300,000	85,237
Singapore	697	4,198
Thailand	513,254	64,763
Vietnam	730,363	83,120
TOTAL	**4,865,502**	**981,804**

(Source: ASEAN, 2008)

4.4.   THE ASEAN REGION's TOURISM POLICIES AND STRATEGIES

Like the SADC region, the Association has promulgated tourism policies and strategies in order to enable and accelerate cooperation or integration in tourism within the region. These tourism policies and strategies include the ASEAN Cooperation in Tourism and Vientiane Action Programme (VAP) 2004 – 2010. The key thrusts of each policy or strategy are outlined below:

4.4.1.   THE ASEAN REGION's COOPERATION IN TOURISM.

The ASEAN Member States have signed a number of co-operation agreements in order to provide guidelines or framework towards the operation of the Association. These co-operation agreements range from money and banking to education. One of these agreements is the ASEAN co-operation in tourism. The ASEAN co-operation in tourism has concentrated heavily on the following operational areas: namely, the promotional, marketing and research aspects of tourism (Broinowski, 1982). The following are some of the key areas of the co-operation:

- *ASEAN Travel Information Centre* - Co-ordinates and manages marketing programmes and projects, liaise with other world and regional tourism bodies and private sector, conduct public relations and other activities related to the promotion of ASEAN travel (Broinowski, 1982),

- *Asean Tourism Fora* - Industry workshops in the respective areas of tourism and the travel mart which brings ASEAN sellers of tourism together with foreign buyers. This Fora is being held on a triennial basis since 1981 (Broinowski, 1982),

- *ASEAN promotional chapters* - Acts as ASEAN's promotional arms in major tourists markets such as Australia – New Zealand (Malaysia), Hong Kong (the Philippines), Japan (Malaysia), United Kingdom (Singapore) and the United States of America (the Philippines) (Broinowski, 1982) ,

- *Collective representation* - ASEAN NTOs collectively attends major international trade and consumer shows, such as World Travel Markets in London, ITB in Berlin (Germany), in order to project a common ASEAN image (Broinowski, 1982),

- *Asean travel films and brochures* - ASEAN countries combined resources to produce a travel film entitled ASEAN *Mosaic* and an *"ASEAN Welcome"* brochure (Broinowski, 1982),

- *Research and manpower training* - The ASEAN countries co-operate in determining a set of common tourism technologies for data collection be drawn up to facilitate information exchange among ASEAN countries (Broinowski, 1982), and

- *Asean circle and promotional fares* - ASEAN circle and promotional fares are aimed at providing inexpensive travel within the region (Broinowski, 1982).

Soopie *et al* (undated) pre-empt the following possible future direction for ASEAN tourism co-operation, namely co-operation in planning and research, co-operation in institutional strengthening, co-operation in the preferential purchase and supply of tourism inputs, co-operation in promotion and marketing and co-operation in rationalizing travel barriers.

4.4.2. VIENTIANE ACTION PROGRAMME (VAP) 2004 – 2010

A roadmap for the tourism sector has been developed. As defined in the Vientiane Action Program (VAP) 2004-2010, the overall goal of the roadmap is to fully integrate the tourism sector across all ASEAN Member States towards a single market production base by 2010. The declarations of the Vientiane Action Program amongst other includes to undertake

measures to expedite the implementation of the ASEAN Tourism Agreement, particularly the visa exemption initiative (in ASEAN in accordance with the Leaders' decision at the Bali Summit in October 2003); advance integration of tourism in accordance with the ASEAN Concord II by 2010 through development of ASEAN Tourism Vision and a roadmap to achieve the target of integration; ensure coherence of policies and initiatives related to tourism development and adopt appropriate measures to prevent all threats to tourism; request the ASEAN Secretariat to be the main coordinator for the implementation of tourism cooperation programs and initiatives and strengthen cooperation with the private sector etc.

4.5.   THE ASEAN REGION'S TOURISM INSTITUTIONS AND MECHANISM – THE ASEAN TOURISM ASSOCIATION (ASEANTA)

Effective implementation of the ASEAN's tourism policies and strategies requires institutions and mechanisms. This section outlines ASEAN's tourism institutions and mechanisms put in place to implement the said tourism policies and strategies and also coordinate the activities of the Member States' National Tourism Organisations (NTOs). These institutions and mechanisms include the Sub-Committee on Tourism and the ASEAN Tourism Association (ASEANTA) (ASEAN Secretariat, 1999).

Sub-Committee on Tourism (SCOT) was charged with the responsibility to arrange regional marketing endeavours (Timothy, 2003). SCOT was dissolved in the mid 1990s and it was a good example of an early attempt to begin regional marketing efforts. The ASEAN Tourism Association (ASEANTA) was formed in 1981 as the "umbrella" organisation of national airlines and the national travel agency and hotel associations of the 10 ASEAN countries (Brunei Darussalam, Cambodia, Indonesia, Laos PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand and Vietnam). The ASEANTA was established in order to replace the SCOT. Through the ASEANTA, ASEAN Member States are beginning to surrender their traditional competitive approach to tourism growth in favour of complimentary relationship with the other member nations. This is manifest more vividly in current efforts to promote the whole region as a single destination, to offer thematic tourism packages and attractions and to conduct other image building per regional activities (ASEAN Secretariat, 1999).

The ASEANTA is made up of the Heads of National Tourist Organisation (NTO), airlines and associations of travel agents and hotels within the ASEAN region that strive to attain the

highest standards of service and facilities for travellers and to support and help develop tourism within the ASEAN region. Image-making is by no means unique to South-East Asia though distinctive trends can be identified, and parallels can be drawn with other parts of the world, notably Africa and the Caribbean (Hitchcock *et al*, 1993). The ASEANTA is similar to the RETOSA established by SADC in 1996.

The ASEAN Tourism Association (ASEANTA)'s target is to mobilize at least 10% of the ASEAN people to travel within the region by 2010. ASEANTA is expecting increased travel in the coming years with the operations of low cost airlines, increased number of hotels and attractive excursion packages.

The success of the ASEANTA depends on the strengthening of the private sector involvement in the ASEAN tourism. In order to achieve this, ASEANTA should be shaped into a more operationally facilitative umbrella body representing all components of the tourism trade. Its functions should be expanded to include liaison and consultation role, setting up of various technical committees to initiate research into problems and practices pertaining to ASEAN tourism, arbitration insofar as it is able to obtain agreement from members on the basic guidelines and procedures, information dissemination, and self-regulation by formulating acceptable guidelines and monitoring the quality and price levels of tourism services provided in the region.

4.6. THE ASEAN REGIONAL DESTINATION BRANDING INITIATIVES

In order to ensure a regional destination brand for the ASEAN region, ASEANTA and the ASEAN's Member States embarked in several promotional initiatives such as rationalization of travel barriers, Visit ASEAN campaign, creating a Brand, collateral production, theme song, sponsorships, ASEAN and ASEANTA websites, aviation magazine advertising, integration of NTO marketing programmes, ASEAN hip hop or air pass, and visit ASEAN pass. Each of these initiatives is outlined below:

• *Rationalization of travel barriers* - Travel barriers are erected in the form of quantitative or non-quantitative measures including taxation of nationals on departure, entry visa, entry permit and passport issuance, or control over foreign aircraft landing rights (Sopiee *et al,* undated). In rationalizing the travel barriers three options were adopted. *Option*

One: All countries could agree to maintain status quo. Tourism co-operation in this area would therefore reach a stalemate. *Option Two*: Member States could seek rationalization and/or exemptions to the various travel taxes imposed. This would make it less burdensome for ASEAN citizens to travel within the region. *Option Three*: Countries could seek total elimination of travel barriers within a specified time frame. This would be the path of greatest resistance given that there is already strong opposition to the dismantlement of travel barriers but would have the greatest effect in liberalizing intra-ASEAN tourism.

- *Visit ASEAN Campaign* - The Visit ASEAN Campaign (VAC) developed over a number of phases. The first phase of VAC was launched in 2001 as an "Awareness Year" for the VAC to build the brand among the global travel trade and the private sector at the World Travel Market (WTM) in London, Workshop on ASEAN and Korean Tourism for Korean and ASEAN travel agents, VAC workshop in Osaka, Japan, and Japan Association of Travel Agents (JATA). It involved four key marketing and promotional elements: VAC collaterals, public relations, advertising, and travel trade activities. The second phase, undertaken throughout 2002, expanded the brand-building activities to include specific promotional and communications activities aimed at consumers in target markets like Japan. The promotional activities covered in this phase were ASEAN Consumer Shows in Member States' international travel fairs such as Indonesia (Tourism Indonesia Mart & Expo, TIME), Malaysia (Malaysian Association of Tour and Travel Agents Fair, MATTA), Philippines (PPTE), Singapore (National Association of Travel Agents Singapore Fair, NATAS), etc; the launching of ASEAN Air and Hotel Pass; joint media and tour operator familiarization; Visit ASEAN Website; reprint of ASEAN map; production of VAC posters; advertising in travel trade magazines TTG & Travel weekly East, TIME, and Newsweek. The VAC third phase focused on intra-ASEAN tourism and included tourism investment promotion and advertising ASEAN as a single destination. Throughout the campaign, several marketing and promotional approaches were undertaken, such as CNN international media campaign; travel trade campaign; the launching of ASEAN Hip Hop Pass (AHHP) nationally (Indonesia, Singapore and Philippines); the promotion of AHHP in five ASEAN Member States (Indonesia, Malaysia, Philippines, Singapore and Thailand) through different marketing channels such as national TV stations, newspaper and radio; and SMS contest. Currently, the VAC is in its fourth phase promoting Visit ASEAN Pass (VAP) prepared by ASEANTA.

Several promotional six initiatives suggested by tourism ministers have been examined. These are: setting up of a common ASEAN area in major international events such as International Tourism Exchange (ITB, Berlin), WTM, China International Travel Mart (CITM), and JATA, establishment of ASEAN tourism chapters, promotion of ASEAN tourism through the airline facilities, e.g. in-flight magazines, establishment of ASEAN Tourism Centres as dedicated organisations that will promote ASEAN tourism in major international markets similar to the ASEAN-Japan Centre, joint familiarisation trip for outbound tour operators of major international markets, promotion of youth travel (ASEAN Secretariat, 1999).

In support of the Visit ASEAN Campaign, ASEAN Member States have embarked into various individual branding initiatives which were linked and coordinated at regional level. Below are some of the individual Member States' campaigns:

- *Thailand* (W*attanathammachart* (culture and tourism) provides the cornerstone for the country's tourism promotion strategy for the 1990's. Tourists to Thailand spent in the region of US$1,000 million on "shopping" in 1989, or about one-third of total tourist expenditure. The significant proportion of this expenditure was on handicraft souvenirs, a factor which was helped considerably by the very successful promotion of the Thailands Arts and Crafts Year (TACY) (August 1988 until December 1989). It was part of the broader strategy of turning Thailand into a "shopping paradise" in the process bolstering the country's earnings from international tourism (Hitchcock et al, 1993),

- *Indonesia* - Indonesia embarked on a Visit Indonesia Year (Hitchcock et al, 1993), *Visit ASEAN Year* (The year 1992 was designed as Visit ASEAN Year. The main aim was to encourage overseas visitors to remain longer in ASEAN through the promotion of multi-destination holidays and visitors to one ASEAN country were able, through the use of special promotional airfares, to travel to a second or third ASEAN country at no extra cost (Hitchcock *et al*, 1993 and Ghimire, 2001). Since 2001, ASEAN has had a Visit ASEAN Campaign (Morgan *et al*, 2004),

- *Visit ASEAN Millennium Year* - Year 2002 was designated as 'Visit ASEAN Millennium Year' under the leadership of the NTOs as well as the private sector in order to improve the region's image and boost tourism, and finally

- *Singapore* - Singapore developed a "New Asia – Singapore" brand is thus not just about promoting and making the island into an attractive destination, rather, it is

embedded in a wider tourism strategy to make Singapore central in regional tourism. The "New Asia" suggests that Singapore Tourists Board (STB) wants to highlight Singapore as part of Asia, and a continent that is changing and progressing (Morgan *et al*, 2004)).

- *Creating a Brand* - Marketing is one of the central tasks needed to attract tourists to tourist regions such as ASEAN. Regional marketing is normally coordinated by an organisation representing tourism industry stakeholders in the region. There are a number of components that may be undertaken in a regional marketing program. These may typically include representation of the region at trade shows, development of collateral, web portals, and development of mass media cooperative marketing programs and indeed brand campaigns. Creation of a brand is a complex marketing task. While some equate the development of a brand with the creation of a logo and tag line, it is much more than this. Tourism destination brands can be a reflection of the people and culture of a particular destination; the things that make them unique, and the things that therefore cannot be duplicated by competitors. While creativity in marketing can help create a brand – significant amounts of money are also required. Destination branding is usually conducted through an umbrella brand campaign which seeks to target particular market segments with the persuasive and emotive reasons to visit the destination. Such umbrella brand campaigns are then linked to specific initiatives by individual operators or groups of operators. The destination brand component of the campaign "sells" the destination while the operator component "sells" individual attractions or hotels or other amenities (ASEAN, undated).

- *Collateral Production* – Marketing collaterals are important instruments for building a destination brand. In her endeavour to develop a regional destination brand, the ASEAN has developed and produced brochures, maps and other collateral useful for trade marketing. Collateral material is a supporting element of marketing programs and the effectiveness measures suggested are based on feedback from the trade and also cost per unit produced. It is strongly suggested that in future, should ASEAN revise its brand, all collateral should be seen to reflect this brand (ASEAN, undated).

- *Theme Song* - The ASEAN theme song has been developed and is used during the ASEAN tourism promotional activities or campaign (ASEAN, undated).

- *Sponsorships* – Chapter 3 showed the significance of sponsorship in building a brand. The region in her endeavour to brand herself, it sponsored and aligns herself with events or activities which attract the market they are promoting (ASEAN, undated).

- *ASEAN and ASEANTA Websites* – The ASEAN region and ASEANTA has developed website as a promotional tools for the region's tourism sector. Chapter 3 also showed the significant role played by a website to promote the region. Website design and evaluation techniques have matured rapidly over the past few years. A number of different measures may be used to evaluate performance of websites. In particular the number of hits and number of downloaded pages are convenient measures for evaluating usage of websites that are easy to obtain (ASEAN, undated).

- *Aviation Magazine Advertising* - One method to target ASEAN region's travellers involves the use of advertising or advertorial material in the magazines of airlines. Such material targets a key market for ASEAN. The effectiveness of the use of airline magazine advertising could be measured by the number of pages covered (ASEAN, undated).

- *Integration with NTO Marketing Programmes* - Some evidence of the integration of the Visit ASEAN Campaign into NTO marketing programs has been provided by Member States. For example, TAT continues to update its overseas offices on the VAC information (ASEAN, undated).

- *ASEAN HIP HOP/AIR PASS* - In 2004, ASEANTA introduced a one year promotion comprised of three components - air, hotel and tour pass. The Tour Pass component provided discounted airport-hotel-airport ground transfers and half-day city tours for holders of the ASEAN Hip Hop Pass. With the AHHP ASEANTA sought to improve the distribution of travel and tourism products and services. The AHHP was made available for sale through all travel agents as well as ASEAN airlines worldwide offices namely Royal Brunei Airlines, Garuda Indonesia, Malaysia Airlines, Myanmar Airways, Philippine Airlines, Singapore Airlines, Silk Air, Thai Airways International and Viet Nam Airlines (ASEAN, undated).

- *Visit ASEAN PASS* - In support of the ASEAN government leaders' recognition of tourism as one of the priority sectors for integration of the region, the ASEAN Tourism Association (ASEANTA) launched the Visit ASEAN Pass (VAP) in 2006. Under the integration process, tourism marketing is emphasized as a tool for integration and the private sector is encouraged to actively engage in joint promotion and marketing of ASEAN tourism activities particularly via Visit ASEAN Campaign, a joint tourism promotion effort of ASEAN Member States. Preliminary statistics indicated that international tourist arrivals in ASEAN reached more than 44 million by the end of 2005, reflecting an increase of more than 4.7 per cent compared to 2004. ASEANTA has, over the years, played an important role in promoting and developing ASEAN tourism products. ASEANTA sought to improve the distribution of travel and tourism products and services. The VAP is made available for sale through all travel agents as well as ASEAN airlines' worldwide offices namely Royal Brunei Airlines, Garuda Indonesia, Malaysia Airlines, Myanmar Airways, Philippine Airlines, Singapore Airlines, Silk Air, Thai Airways International and Vietnam Airlines. VAP will be a Business-to-Business (B2B) model between the regional tourism service providers and travel agents regionally and worldwide. Only registered members of the various ASEANTA's members are allowed to participate exclusively as sellers (ASEAN, undated).

4.7.   THE ASEAN REGION's TOURISM PERFORMANCE

The ASEAN region is one of the fastest growing tourists regions in the world (Soipee *et al,* undated). According to the United Nations World Tourism Organisation (table 4.2 and figure 4.2 & 4.3), the ASEAN region's tourists in 2005 was approximately 51 million and 23 million tourists are the citizens of the ASEAN region.

Soipee *et al* (undated) further emphasise that the ASEAN region has seen tourists' arrivals double and tourism receipts triple in the last decade. While the region still receives less than 11 percent of global tourist's arrivals, the impact of tourism on these nations is immense and often disturbing. Tourism is the leading source of foreign exchange in Thailand, a major source of foreign exchange in Malaysia, the second largest industry in the Philippines, and the third highest source of foreign exchange in Singapore.

The SADC region only recorded almost 16.9 million arrivals (see section 2.4.3 in chapter 2) in 2006 (UNWTO, 2007). This is almost 35 million less than the tourists arrivals recorded by the ASEAN region in 2005 (UNWTO, 2007). This significant difference in the value of tourists' arrivals might be attributed to the fact that the SADC region is not being promoted and marketed as a single tourist's destination while the ASEAN region has been promoting and marketing herself as a single tourists destination since the 1980's. The political instabilities experienced within the SADC region's Member States might also be the cause of the poor tourism performance as compared to the ASEAN region.

4.7.1. TOTAL INTERNATIONAL VISITOR ARRIVALS TO THE ASEAN REGION (1999 – 2005)

International visitor arrivals into the ASEAN region have reached almost 51.3 million in 2005 (see figure 4.2). This translates into average annual growth rate of 7.1% in international visitor arrivals into the region between 1999 and 2005.

Figure 4.2: Total International Visitor Arrivals to the ASEAN region (1999 – 2005)
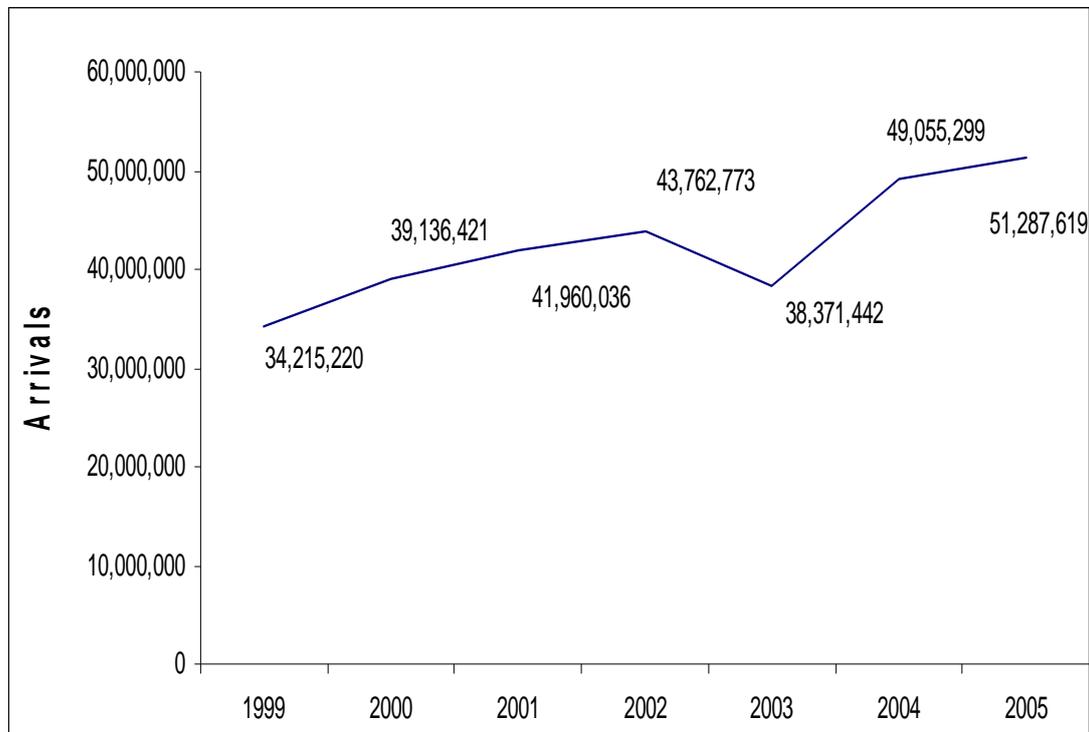
(Source: ASEAN, 2006)

4.7.2. TOTAL INTERNATIONAL VISITOR ARRIVALS TO ASEAN REGION PER MEMBER STATE (2003 - 2005)

Table 4.2 shows the total international visitor arrivals to ASEAN per country from 2003 – 2005. Malaysia accounts to the largest amount of international visitor arrivals to ASEA followed by Thailand, Singapore and Indonesia. Brunei Darussalam receives the smallest number of international visitor arrivals.

Table 4.2: Total International Visitor Arrivals to the ASEAN per Member State (2003 – 2005)

| Country	2005	2004	2005/2004 (%)	2003	2005/2003 (%)
Brunei Darussalam	127,142	118,863	7	944,130	(643)
Cambodia	1,421,615	1,055,202	26	701,014	51
Indonesia	5,002,101	5,294,380	(6)	4,370,908	13
Laos	1,095,315	894,806	18	636,361	42
Malaysia	16,431,055	15,703,406	4	10,576,915	36
Myanmar	660,206	656,910	1	597,015	10
Phillipines	2,623,084	2,291,352	13	1,907,226	27
Singapore	8,942,408	8,375,094	6	6,127,029	31
Thailand	11,516,936	11,737,413	(2)	10,082,109	12
Vietnam	3,467,757	2,927,873	16	2,428,738	30
TOTAL	**51,287,619**	**49,055,299**	**4**	**38,371,442**	**25**

(Source: ASEAN, 2006)

4.7.2. MAJOR MARKET SHARE BY REGION OF INTERNATIONAL VISITOR ARRIVALS TO ASEAN (2005)

One of the key objectives of the ASEAN region is to promote intra-regional travel. In 2005, see figure 4.3, the ASEAN region's tourists accounted to 45% of the international tourist arrivals into the ASEAN region and this was followed by Asia (27%), Europe (12%), America (6%), Australasia/ Pacific (5%), and others (5%). This suggests that a substantial tourism flow occurs between developing countries within the region (Ghimire, 2001). A similar picture is also depicted in chapter 2 about tourism flows within the SADC region. The World Tourism Organisation's (UNWTO) forecasts suggest a sustained growth of intraregional travel in most regions within developing countries in the coming years. Intraregional tourist arrivals in Africa, for example, will constitute 64% of all tourist arrivals in 2020 (compared to 58% in 1995). Similarly, 83% of all the tourist arrivals in East Asia and

the Pacific are to be from within the region in 2020 (compared to 79% in 1995). Figure 4.3 shows that regional visitors encompass a significant group of tourists in most ASEAN countries (Ghimire, 2001). It was also shown that the biggest number of travellers visiting the region is from Japan, China, Korea, United States, Australia, and Taiwan.

While the biggest movers of people travelling both within the ASEAN and even outside the region are those from Singapore, followed by Japan, Malaysia, India, and Thailand.

Figure 4.3: Major Market Share by region of International Visitor Arrivals to the ASEAN region (2005)
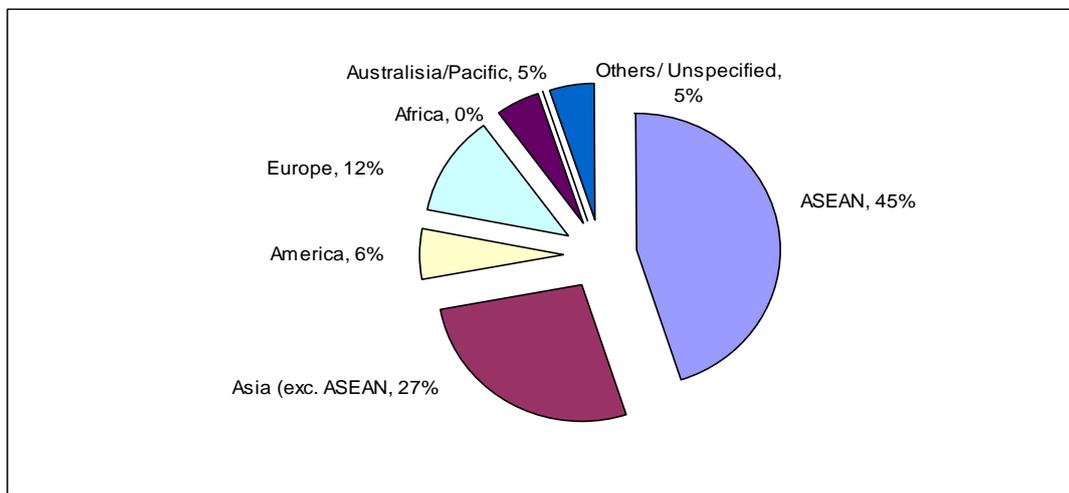
(Source: ASEAN, 2006)

4.8.   **SUMMARY AND CONLUSION**

What is evident from the above discussion is that the ASEAN provides an appropriate case study from which SADC could learn in terms of regional tourism branding and its extended experience in regional tourism cooperation. Regional tourism has been a significant economic development strategy for ASEAN for more than three decades. The ASEAN co-operation in tourism outlines the framework which would guide all ASEAN Member States in relations to cooperate with each other. The co-operation outlines various suggestions that could be applied in order for the Member States to work together in promoting ASEAN region as a single tourist's destination. Most of the Member States have developed their own promotion campaign which is linked to the region as a whole. The ASEAN tourist statistics shows that the region is performing excellently in attracting tourists.

This chapter has shown that in order to develop a regional destination branding, ASEAN has embarked on number of initiatives such as establishment of ASEANTA, rationalising travel barriers, visit ASEAN campaign, collateral production, websites development and air pass. As a result of such initiatives, international tourism arrivals within the ASEAN region increased from more than 38 million in 2003 to over 51 million in 2005. This can partly be attributed to the regional destination branding strategy adopted. The regional destination branding framework for the SADC region proposed in the next chapter will adopt some of these success stories.

In conclusion, it can be said that, although in principle regional tourism represent a useful instrument in regional economic self-reliance and progress, including a level of community welfare at the local level, this needs careful planning, taking into account political and economic realities and constraints. The establishment of regional blocs has helped to bring to the fore the rationale and importance of regional cooperation of tourism, so far there have been few sustained outcomes. Most activities remained limited at the level of a declaration of good intentions and elaboration of policy strategies, while measures implemented thus far have tended to encourage unequal relations among Member States and support the interests of the business groups.

Like in the SADC region where South Africa is the primary beneficiary of the arrangements, within the ASEAN region the well developed Singapore is the primary beneficiary.

CHAPTER 5
FORMULATING A REGIONAL DESTINATION BRANDING FRAMEWORK

5.1.   INTRODUCTION

In chapter 3 of this study various destination branding theoretical frameworks, which focus mainly on city; province and country level were outlined. These models do not include any branding initiatives at a regional level, which includes multiple countries with different and unique tourism offerings and large number of stakeholders. Cai (2002) developed a model of destination branding, which includes the following main elements namely; brand element mix, attributes component, effective component, brand image building, marketing programs, marketing communications and managing secondary associations. During the same year, Morgan *et al* (2002) developed and analysed the five steps/ phases in destination brand building such as market investigation, analysis and strategic recommendation, brand identity development, brand launch and introduction, brand implementation and monitoring, evaluation and review. Kaplanidou *et al* (2003) developed a framework focusing on the components of Branding. They identified the following as important components of branding, brand image, brand identity, brand culture, brand character, brand personality and brand essence or soul. The findings of literature review, as contained in chapter 2 (attributes of tourism within SADC) and chapter 3 (destination branding models and phases) and lessons learned or success stories of ASEAN region in chapter 4 are used to kick-start development of possible indicators for the development of a regional destination branding framework for the SADC region.

The framework suggested in this chapter is only a template and bird's eye view or helicopter's view to guide the formulation of the regional destination branding framework for the SADC region. This framework includes aspects such as vision and mission, the destination brand and its proposition, core values of the destination and its brand, brand identity, brand image, clear view of the market place, audience and competitors, brand personality, brand positioning, stakeholder consultation process, and tourism research. This chapter has attempted to address the objective 1.4.4 as outlined in chapter 1 of the study.

This chapter will also give a brief summary of the findings of the study as well as comparative analysis of the findings of the SADC and the ASEAN regions. Finally, conclusions and recommendations of the entire study are made at the end of the chapter.

5.2. FRAMEWORK FOR THE DEVELOPMENT OF A REGIONAL DESTINATION BRANDING.

The information gathered through the literature review and also lessons learned from the ASEAN region are used to propose a framework for the regional destination branding for the SADC region. This framework outlines critical elements that should be considered when branding a regional tourism destination. It is not really different from branding at a city or a country level. The only difference is the size of the area to be considered which includes various tourism offerings, and the extent of tourism stakeholders. This framework should not be seen as a static piece of paper but rather as a dynamic technical document that has to be updated and improved at regular intervals as circumstances change (Mabunda, 2004). Mabunda (2004) further indicates that planning in general should not be done in isolation by an individual (expert) but should rather involve internal and external stakeholders. The following are suggested as critical elements of the framework and are fully discussed below. Vision and mission, the destination brand and its proposition, core values of the destination and its brand, brand identity, brand image, clear view of the market place, audience and competitors, brand personality, brand positioning, stakeholder consultation process, and tourism marketing research. These elements are not outlined in order of their importance and but it is understood that they are equally important for the successful development of a regional destination branding framework.

5. 2.1.   VISION AND MISSION

Kaplanidou *et al* (2003) asserts that a clear vision and mission guide the destination's current and future branding efforts. That means that both the vision and mission provide an intended future direction and how that is going to be achieved. To ensure that the branding development process runs smoothly without any interruptions from other stakeholders, the vision and mission should be clearly defined and ensure that everybody is involved during the crafting of the vision and mission for the destination (Ooi, 2004). The SADC region should develop a vision and mission which will be agreeable to all the stakeholders and

should also be identifiable to the region's tourism offering. Various platforms such as SADC's Council of Ministers, Board of Director of RETOSA and within RETOSA (for more of such institutions see figure 2.2 in chapter 2) itself should be used to discuss the vision and mission of SADC's regional destination brand.

5.2.2.   DEFINE THE BRAND NAME AND ITS PROPOSITION

One of the requirements of a regional destination branding process, like branding in general, is to determine the brand name and decide on a unique selling proposition (USP). The destination brand specialists should decide on the name of the brand, and increasingly on whether or not to determine a sub-brand of existing brand or a totally new brand. Due to the size of the SADC region, with almost 14 Member States/countries, as outlined in chapter 2, it is going to be difficult to decide on the brand name and it is also going to be critical to sub-divide the destination into sub-brands. The sub-brands will have more specific products or services on offer, for example, the wildlife or safari experience, history and heritage and natural beauty. But for tourism destinations, unlike consumer products, the brand name in most cases become city, region and country name. For the purposes of the study, the name of the region might be an appropriate brand name or may craft a brand name from the key icons of the region such as Wildlife of Africa and Great Rivers of Africa. It has been shown in the previous chapter that the ASEAN region uses ASEAN as her brand name and SADC could do the same.

Through the unique selling proposition (USP) the destination is trying to discover the USP which competitors did not or could not capture or cover. The USP comes from the culture of the destination itself and a combination of other benefits such as convenient yet unspoilt, lively city and peaceful countryside. A destination brand has to have a simple, easy to understand message in order to stand out from the clutter of messages to which we are all subjected every day of our lives. Like the vision and mission above, broader stakeholder consultation and acceptance is very important in determining the brand name and unique selling proposition.

5.2.3. ESTABLISH THE CORE VALUES OF THE DESTINATION AND ITS BRAND

For the destination to effectively differentiate itself from the competitors and acceptable to the tourist, the core values of the destination and its brand should be established and defined. These values should be durable, relevant, communicable and hold saliency for potential tourists (Morgan *et al*, 2002). An in-depth market research survey should be conducted in order to analyse the tourist's expectations and their experience with the destination (Ooi, 2004) and compare our offering against the competitors in order to develop values that differentiate competing destinations from each other. The process of undertaking the market research is outlined in sub-section 5.2.11 in this chapter.

The brand values should underpin and imbue all subsequent marketing activity so that the brand values are cohesively communicated. A logotype or brand signature and a design style guide, which ensure consistency of messages and approach, should also reinforce the brand values. The vision should be clearly expressed in the brand's core values which are consistently reinforced through the product, and in all marketing communication. For it to remain in the consumer's mind, the brand values remain the same throughout the destination's entire life (Morgan *et al*, 2002).

5.2.4. BRAND IDENTITY

Konecnik *et al* (2007) assert that place identity can contribute importantly to the creation and sustenance of a distinctive competitive edge. It is mentioned in chapter 3 of this study that brand identity defines the brand/ destination from a supply-side perspective. It means that tourist destinations will define both their brand and content.

Brand identity includes tourism products, tourism services, tourism organisations, local cultural characteristics, geography, history and culture, tourism attractions (nature, mountains and lakes, beaches, towns and cities, health resorts, adventure, historical & cultural activities, nightlife, entertainment and SADC people – local culture and history

The regional destination brand should include one or more basic characteristics that the region seeks to emphasise or stress. These basic characteristics include things such as wildlife

(transfrontier conservation areas outlined in chapter 2), scenic beauty, history and heritage. The Member States' branding strategies could also be beneficial in terms of the supply of such information.

National identity has a positive influence when purchasing goods and services. Negative or distorted perceptions hinder and limit tourism performance. The national identity should support tourism in an easy identification of the destination by the tourists (consumers), easy maintenance of quality and standards, a perception of the good value for the price and a large enough demand for general product.

SADC region should rid herself of an identity riddled with crime, civil wars, poverty, and political instability if it wants to develop a strong regional destination brand.

5.2.5. BRAND IMAGE

For the destination image to be acceptable to the consumer, it should fit into the consumer's image. This connection between the self image and a destination image is consistent with arguments that lifestyle and value systems are key elements in destination choice process (Ekinci, 2003). In particular, travel is increasingly about experiences, fulfilment and rejuvenation rather than about `places and things`. Examples of images: higher prices, customer service, safety, friendliness of local people.

The SADC region is at best constrained and fragmentary and only partially attempts to overcome images of instability and lack of security. International tourists play a significant role in terms of image reinforcement, and as an international branding agent.

When developing a destination image the following should be taken into consideration (Beerli and Martin, 2004), namely tourists have images of the destination even if they have never been to the destination. These images might be positive or negative; the destination should develop a closer working relationship with the distribution channel[18] and ensure that

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[18] Distribution channel is any organised and serviced system, created or utilised to provide convenient points of sale and/or access to consumers, away from the location of production and consumption, and paid for out of marketing budgets. (Middleton, 1994). Distribution channel in the tourism sector is composed of travel agencies, tourism operators, global distribution systems

the messages transmitted coincide with the desired image of the destination; in addition, it is important for the destination to collaborate more directly with the media to keep track of the image which is being broadcast; and the development of the image must be based on reality; otherwise the destination will not succeed in satisfying the tourists, which will in turn have a negative effect on the image that they will transmit by word of mouth.

It has be shown in chapter 4 that in order to project a common ASEAN image, the ASEAN NTOs collectively attended major international trade and consumer shows such as WTM and ITB. This is being called collective representation.

5.2.6.   CLEAR VIEW OF THE MARKET PLACE, TARGET AUDIENCE AND COMPETITORS

The five phases in destination brand building identified by Morgan *et al* (2002) and discussed in the Chapter 3 include market investigation, which reveals that analysis and strategic recommendation is the first phase of destination brand building. The destination brand benefit pyramid discussed in the same chapter, also looks at the consumer's relationship with the brand. It shows the understanding of the brand by the consumers as well as revealing what the consumer expects from the brand as it is very important for brand building. All the models outlined in chapter 3 are silent about analysing competitors.

Market analysis will include mainly the analysis of the following: What is the market size? Which market segment is attractive and easy to access? When and how are they travelling? What are the market's travel preferences (wildlife, culture and scenic beauty)? What is the spending ability or potential of the market? What are the perceptions of the market about the destination? Communication and distribution channel? What is the demand for the tourism products on offer in the region?

The research analysed global tourism trends, consumer behaviours and the decision making process of travel consumers, and aligned these against visitor perceptions, its services and attractions. To be completely effective in the global tourism market, any destination must be selective about the target market offering the best return on investment. The research also

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(Abadzheiv, Euba, Zeeshau, undated) and charter brokers, reservation systems and other travel distribution specialists (Buhalis, 2000)

assisted in determining the target market in each location and to select the best ways, both in terms of the messages and the media used to reach those target markets

Competitor analysis includes the analysis of the following issues: Competitor profiles, Competitor's resources and capabilities, Strengths and weaknesses of the competitors, and Competitors' strategies. Understanding of competitors has been stressed in section 4.6 in chapter 4 where it has been stated that tourism destination brands can be a reflection of the people and culture of a particular destination, the things that make them unique and the things that cannot be duplicated by the competitors.

5.2.7. BRAND PERSONALITY

Brand personality provides a connection between the brand's emotional and self-expressive benefits and sets forth the basis for customer-brand relationship. Dimensions for generic brand personality include but are not limited to: sincerity, excitement, competence, sophistication, and ruggedness. Most of the relevant personalities are youthfulness, modern, honeymoon, vibrant, caring and charming.

The strength of the brand lies in its capacity to remain true to its personality or purpose irrespective of the target audience or mode of communication (Wood and Crocket, 2002). It is important that the core personality of the destination should be clearly defined and that all marketing strategies should be true to the personality. The core personalities should be identified. The personality traits are also dependent upon community / Member States' attitudes. For the destination brand to be successful in the long term, it needs to reflect the entire state's culture or personality, and the entire population should have ownership of the brand.

Tourism branding is the using of the branding as a means of emphasizing the feel of a place and developing a personality of a location. This differentiates the destination from the typical travelogue attractions because the branded destination is an experience, not just a place to go.

5.2.8. BRAND POSITIONING

Brand positioning with various attractions in creative executions for a specific target group should be developed. The brand positioning should be flexible to allow the destination marketers to adapt various themes.

Generally, the product positioning process involves:

- Defining the market in which the product or brand will compete (who the relevant buyers are),
- Identifying the attributes (also called dimensions) that define the product 'space',
- Collecting information from a sample of customers about their perceptions of each product on the relevant attributes,
- Determine each product's share of mind,
- Determine each product's current location in the product space,
- Determine the target market's preferred combination of attributes (referred to as an *ideal vector*),
- Examine the fit between the position of your product and the position of the ideal vector, and
- Position.

5.2.9. MONITORING, EVALUATION AND REVIEW

In the five phases in destination brand building, as discussed in chapter 3, the need for monitoring, evaluation and reviewing the destination brand process was alluded to. It is imperative to develop clear criteria for assessing trends, outcomes and outputs (Mabunda, 2004). Monitoring, evaluation and review are essential to ensuring the success of a destination brand building process. They will enable SADC/ RETOSA to: measure progress towards targets and objectives; understand whether actions and initiatives are achieving the intended results, and if not, why not; establish the overall effectiveness of the process; and review and amend the process in the light of successes and failures, and changing social, policy and practice environments, to ensure its continued effectiveness.

A framework for systematic monitoring, evaluation and review should be established as part of the regional destination branding process.

Monitoring is a systematic and periodic measurement of key indicators of biophysical and social conditions. Systematic implies that there should be an explicit plan with set indicators and predetermined stages of monitoring

Steps to develop and implement a monitoring plan are:

- Planning the monitoring (Planning and Monitoring includes the establishment of a steering committee; and holding meetings with role-players and agree on terms of reference).

- Developing a monitoring process (Developing a monitoring process includes the following issues: Identify impacts and indicators to be monitored, Select the methods of measurements, Identify limits of acceptable change, and Develop an operational monitoring plan).

- Monitoring instruments (The monitoring instruments include interviews with tourists, comment books, suggestion boxes, and economic performance of main stakeholders affected by the strategy).

Evaluation of the destination branding process has the following main elements: effectiveness – which involve the extent to which aims and objectives are met, Appropriateness - relevance to need, Acceptability - to the people concerned, Efficiency - ratio of costs to benefits, and Equity - equal provision for equal needs

Evaluation could also include consideration of how stakeholders experience the strategy; what changes or benefits the strategy is bringing about beyond the objectives (unexpected benefits/problems); evaluate the effectiveness, reliability and validity of the monitoring programme; and reiterate results and apply lessons learned to improve the situation to achieve desirable results.

Review - The strategy should be regularly reviewed. This review should take into account the findings of the monitoring and evaluation, including successes and problems; environmental changes (for example, policy/legislative; economic; and social changes) which may demand new or different responses; developments in other localities (or within the local area) - are new schemes emerging as examples of good practice which can be learnt from?; feedback from those affected by the process; review is when an organisation looks at the results of an evaluation and decides whether it needs to change. Information from monitoring may also prompt a review of a small area of the projects work but a substantial review can only take place once a proper evaluation of an organisation's effectiveness has taken place; and review may take place annually or at the end of a longer term project.

Table 5.1:   **Destination Branding Elements**

Attributes	Criteria for assessment	EVALUATION					MONITORING				
		Excellent	Very good	Satisfactory	Poor	Very Poor	Improving generally	Improving slightly	No visible/ no change	Declining in some areas	Widespread
Brand image	Destination Perception										
Brand Identity											
Brand Personality	User imagery										
Consultation process	Stakeholder support										
Market Analysis	Customer relations										
Competitor analysis	Competitive edge										
Market research	Market intelligence availability										

Each of the attributes, stated in the above table, can be rated on 1- 5 Likert Scale to assess their importance. The rated score can be balanced by marking with an X the trend of each criteria assessed. Where appropriate qualitative remarks can be added to substantiate or add perspective on the indicators that are being measured. To improve monitoring and evaluation tools continuous research and intensive stakeholder consultation must be encouraged in the field of tourism management (Mabunda, 2004).

5.2.10. INTENSIVE STAKEHOLDER CONSULTATION PROCESS

Stakeholder consultation has been identified as one of the critical element of destination branding. In actual fact, before any of the above elements of the destination branding could be finalised, relevant and interested stakeholders should be consulted. Crocket *et al* (2002) indicate that the brand development should employ the partnership approach and all

stakeholders (governments and industry) should coordinate their efforts to ensure that destination branding becomes a reality (Pride, 2002).

Stakeholders have different interests and authority within the tourism sector. It is important that during the consultation process, various stakeholders should be identified and their interest levels defined. The following are the key stakeholders in the tourism industry (Ooi, 2004): Primary stakeholders (Government (National, Provincial and Local), owners and managers of accommodation and other tourism facilities, tourism trade, and associations within the tourism industry) and the Secondary stakeholders (Political organisations and politicians, private tourism researchers and consulting companies, Communities and local residents, journalists, non-tourism businesses and again, question why them, and Both domestic and international tourists).

All these people and organisations have the right to question and challenge the destination branding process. The brand and its values are selected after lengthy meetings and discussions with different regional and local authorities, tourism businesses, tourism attraction managers and other interested workers.

The tourists, through intensive research should be consulted about what is their preferred tourist destination and concerns when visiting the destination. It has been discussed in chapter 4 that the success of a destination brand building process depends on the strengthening of the private sector involvement in which SADC like ASEAN will have invested resources to do so.

Given the size of the region, it is going to be an exhaustive process to ensure that every interested stakeholder has been consulted and their inputs are also considered. It is suggested that each SADC's member's state should consolidate inputs from their respective countries and submit to RETOSA for consideration. There should be distinct government leadership on the issue and NTOs and the SADC Member States should be given the responsibility to lead the process. Diverse groups of public and private sector organizations need to decide to work together to agree on the domain brand positioning and to create a set of brand guidelines. The cornerstone of the development of a destination branding is a partnership between the government and the industry.

During the process of stakeholder consultation, care should be taken to ensure that stakeholders do not serve their own individual needs and the consultation time should be taken into consideration. Other stakeholders might delay this process and strict deadlines for the consultation process should be agreed right from the beginning.

Since this process is complex and as a politicised activity that includes multiple stakeholders, it might take a longer than expected or planned time to execute. In chapter 3, the methodology to assess stakeholder power within the context of destination branding was discussed. The methodology includes positional, reputational and decision making approaches. All these methods should be combined during the consultation process to ensure that relevant stakeholders are consulted and no one is left out.

5.2.11. TOURISM MARKETING RESEARCH

Mabunda (2004) emphasised the need for continuous tourism marketing research in the field of tourism management. The same research is required for destination branding, as an important attribute that can add value to almost all the steps of the destination branding process. The primary function of the research is to assist the destination branding building specialists to have an understanding of the tourists' profiles, needs and expectations, and also the key tourist offerings within the SADC's Member States, and this will provide information that will contribute to the effective development of the destination branding.

The market research amongst other things will assist SADC or RETOSA to shape all aspects of the brand development strategy and to establish credible and representative attributes (Wood *et al*, 2002); really understand the perceptions, needs and expectations of the tourists (Slatter, 2002); assess competition, what distinguishes the brand from the rest and the extent to which it fully meets the needs of the largest audience (Gilmore 2002); allow comparisons and draw lessons on how and why destinations' branding campaigns differ (Ooi, 2004); successful brand is based on a vision which is founded on intensive, consumer and competitor research (Slatter, 2002); and avoid the brand to be stigmatised by the wrong decisions being accumulated over time (Tasci *et al*, 2006).

The research programme is composed of three main components (Wood *et al*, 2002) such as consultation with the possible users of the brand SADC, comprehensive market research

programme in the key national and the international markets, and the target market selection processes.

There are various research methods and tools to be used during destination brand research, such as quantitative research[19] (online, phone, in-person, mail and intercept surveys) and qualitative research [20](focus groups, depth interviews and ethnography).

Like a brand image above, the ASEAN NTOs has a "plan-on-plan" approach in order to improve research capacity amongst the ASEAN Member States. Through this approach ASEAN region has prioritised the following research projects – ASEAN tourism audit, tourism forecasting, impact studies, and a long-range tourism plan.

5.3. SUMMARY OF THE RESULTS

The purpose of this study was to suggest a framework for the development of the regional destination branding. To gain a broader understanding of the destination branding concept and how it is applied in the SADC's Member States, a research review approach was used to gather and analyse data.

It is clear that regional destination branding framework for SADC is possible, but in-depth market research and extensive stakeholder consultation should be undertaken to ensure that a proper destination image and identity is developed. As a result, the smaller destinations such as Angola, DRC, and Malawi will benefit substantially from regional destination branding, and in turn tourists will have a greater tourism destination to enjoy. The regional destination brand will be greatly enhanced by the staging of the Soccer World Cup in South Africa in

[19]   Quantitative research is research involving the use of structured questions where the response options have been predetermined and a large number of respondents is involved. By definition, measurement must be objective, quantitative and statistically valid. Simply put, it's about numbers, objective hard data (Jarausch & Hardy, 1991).

[20]   Qualitative Research is collecting, analyzing, and interpreting data by observing what people do and say. Whereas, quantitative research refers to counts and measures of things, qualitative research refers to the meanings, concepts, definitions, characteristics, metaphors, symbols, and descriptions of things. Qualitative research is much more subjective than quantitative research and uses very different methods of collecting information, mainly individual, in-depth interviews and focus groups. The nature of this type of research is exploratory and open-ended. Small numbers of people are interviewed in-depth and/or a relatively small number of focus groups are conducted (Patton, 2002).

2010, the introduction of a Univisa for the region as well as the proper use and exploitation of the benefits, which can be derived from the transfrontier conservation areas (TFCAs) for tourism purposes.

If SADC is totally committed to achieving the objectives, as outlined in Protocol in Tourism, and also achieving the targets forecast by the World Tourism Organisation in the 2020 Tourism Vision, the regional destination branding framework is the only solution. It is estimated that if SADC could develop the regional destination brand as outlined in the previous chapter of the study, it might double the estimates forecast by the UNWTO in the 2020 Tourism Vision.

Chapter 2 of the study shows that the SADC region has the will, resources and sufficiently developed structures and systems to develop the region as a single brand. It is thus well positioned to build a regional destination brand, given her natural attractions, diverse cultural resources, wildlife and scenic beauty, as well as her people. Therefore, if the SADC and her Member States actively support and believe in regional destination branding and integrate their resources to form a complete tourism package, the area could become a highly competitive tourism destination.

The study shows that tourism economy within the SADC region's growth exceeds growth of the entire Africa and the World, but only few countries such as South Africa is benefiting from this growth. For the entire region to benefit equally from the tourism, negative image of other countries such as DRC and Angola should be changed. The latter countries within the region are known for wars, crime and poverty. More resources should be channelled to the development of infrastructure relevant for the tourism industry such as roads, airports and tourism signage.

Chapter 3 shows that similar branding tools used for the product branding could be used to develop a regional destination brand with minor adjustments such as extensive consultation.

Chapter 4 showed the significance of a single tourism brand for the region and how ASEAN benefited from establishing a single tourism brand. The road travelled by ASEAN could easily be travelled by SADC countries.

It is hoped that this study will assist SADC in particular RETOSA to formulate a regional destination branding strategy for the region in order to harness the region's tourism potential.

After critically reviewing these results, the following conclusions were drawn and recommendations made.

5.4. CONCLUSIONS

The main problem statement of the study established that the lack of a regional destination brand for the SADC region contributes greatly to the modest number of international arrivals to some of the smaller destinations (in terms of tourism industry developments) within the region such as Angola, DRC and Malawi.

The SADC region has not yet fulfilled the objectives it set for itself in the Tourism Protocol, of aggressively promoting the region as a single but multifaceted tourism destination capitalizing on its common strengths, and highlighting individual member state's unique tourist attractions. In addition, RETOSA has not yet achieved its mandate of marketing the SADC region as a collective tourism destination.

The tourism sector has the capacity to create more jobs, help countries or regions to spread economic activity into areas previously marginalized economically, and spatially peripheral/ economically backward or depressed areas, and create the climate for the vitally important injection of foreign exchange. The opportunities to locate industry and other developments in areas poor in natural resources, should motivate the SADC and RETOSA to work very hard in order to ensure that the objectives as outlined in the Tourism Protocol and the Charter of the Establishment of RETOSA are achieved, and the tourism sector's potential to contribute to the GDP is unlocked, harnessed and given latitude to expand.

The study further shows that there is a difference between product or service branding and destination branding but more or less similar techniques and models could be used to build both product and destination brands.

For the purposes of a regional destination branding framework, the destination definition of the classical/ conventional writers is not appropriate because it views a destination from a physical space. It has been established during the course of the study that both brand image and attractiveness definition of a destination and views about branding are from a demand or consumer perspective. Again, both brand identity and competitiveness definition of a destination view branding from a supply side perspective only.

106

The ASEAN region presents a wonderful case study from which SADC could learn and benchmark from as well as to draw from her experiences. The regional destination branding framework proposed in this study presents a great input into SADC and RETOSA's regional destination branding development initiatives.

5.5. RECOMMENDATIONS

Based on the discussions of the study and literature findings, this study recommends the following:

5.5.1. The Southern African Development Community should develop a strong destination or brand identity and image, which will clearly differentiate herself from other competing destinations, and which is acceptable and motivating to a wide range of tourists from varying demand sectors.

5.5.2. Strong stakeholder consultations are encouraged to ensure that the brand and its values are acceptable to all interested parties (stakeholders), and to ensure that they fully support, "buy-into" and jointly promote the brand. Since RETOSA has relatively few members, it should embark on an aggressive marketing drive to ensure a far higher representation of tourism stakeholders are becoming members of the organisation.

5.5.3. Continuous market research should be conducted in order to identify the changing needs and trends in consumer demands, perceptions and expectations of the potential customers from the brand, and identify any competitors' new marketing tactics.

5.5.4. To build a strong regional destination brand, governments and private sector should invest in improving infrastructure and safety and security of the tourists.

5.5.5. SADC Member States should aggressively invest in comprehensive and continuous tourism market research and monitoring in order to have up-to-date tourism information which will inform their future strategies and plans.

5.5.6. SADC and RETOSA should implement the provision of the Tourism Protocol and Charter for the establishment of RETOSA in order to ensure that the region is marketed and promoted as a single tourist destination.

5.5.7. Like the ASEAN region, the SADC region should collectively attend tourism exhibitions and shows such as WTM & ITB as a collective. This will enforce the regional destination branding.

5.5.8. The region should exploit the marketing opportunities presented by 2010 FIFA World Cup to enhance regional destination brand.

5.5.9. The region should also rationalise travel barriers through the introduction of Univisa in order to enhance the regional destination brand.

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113

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