Destination Branding for Southern Africa Region:

Brand Communications and Management Strategy

DRAFT-3 (Oct 2012)

Prepared by:
Table of Contents

TABLE OF CONTENTS 2

1. EXECUTIVE SUMMARY 3

2. INTRODUCTION: BACKGROUND AND CONTEXT 9
   2.1 STRATEGIC CONTEXT 9
   2.2 OBJECTIVES 12
   2.3 THE CHALLENGE 14
   2.4 METHODOLOGY 15

3. KEY ISSUES AND CRITICAL SUCCESS FACTORS 16
   3.1 CHALLENGES SPECIFICALLY RELATED TO THE SOUTHERN AFRICA BRAND 16
   3.2 OTHER CHALLENGES – RELATED TO THE LONG-TERM SUCCESS OF TOURISM IN SOUTHERN AFRICA 20
   3.3 CRITICAL SUCCESS FACTORS 22

5. BRAND COMMUNICATIONS STRATEGY 26
   5.1 AIM 26
   5.2 COMMUNICATIONS OBJECTIVES 26
   5.3 STRATEGIC APPROACH 27
   5.4 TACTICS – IMPLEMENTATION GUIDELINES 36

6. BRAND MANAGEMENT STRATEGY 52
   6.1 AIM 52
   6.2 MANAGEMENT OBJECTIVES 52
   6.3 STRATEGIC APPROACH 52
   6.4 TACTICS – IMPLEMENTATION GUIDELINES 54
   6.5 BRAND MANAGEMENT STRATEGY – CRITICAL SUCCESS FACTORS 64
1. EXECUTIVE SUMMARY

1.1 Background and Purpose

The Commonwealth Secretariat (COMSEC) has provided technical assistance to the Regional Tourism Organisation of Southern Africa (RETOSA) for the development of this Brand Communications and Management Strategy, which incorporates implementation guidelines. RETOSA is an agency of the Southern African Development Community (SADC) and is responsible for coordination of tourism promotion and development for the SADC region. The fifteen members of SADC are all members of RETOSA and eleven of these are Commonwealth members. The current focus is on fourteen members (i.e. except Madagascar, which has been suspended for the time being). RETOSA wishes to market the region as a single, but multi-faceted, destination.

The strategic context for this Brand Communications and Management Strategy is RETOSA’s comprehensive and ambitious Southern Africa Regional Tourism Growth and Development Strategy.

In 2010, RETOSA embarked on a brand development process. A new brand identity and slogan (“Experience Southern Africa”) has been designed for Southern Africa as a single but multi-faceted tourism destination.

The new brand identity incorporates four signature attributes of the region:

- Diversity
- Wilderness
- Humanity
- Climate

These were agreed on through a consultative process undertaken with the member countries and strategic industry stakeholders. The new brand identity and slogan was approved by the Board of RETOSA in July 2011 and endorsed by Ministers responsible for Tourism in March, 2012.

This is the focus of this Brand Communications and Management Strategy.
1.2 Aims

The overriding aim of the Southern Africa brand is to remedy the image deficit of the region by conveying a positive image of the region as a single and multi-faceted destination, thereby spreading the benefits of sustainable economic development through tourism.

The aims of this Brand Communications and Management Strategy are:

- To enhance the visibility and awareness of the Southern Africa region in external markets through application of the Southern Africa brand.

- To encourage and enable stakeholders in member states to own the regional brand, to be proud of it, and to use it in their own marketing communications, thereby uniting countries of the region in a cooperative approach to marketing Southern Africa wherever appropriate.

- To ensure that the regional brand remains sustainable over the long-term, by developing a robust process for managing the regional brand.

1.3 Regional Brand Communications

Successful implementation of the Southern Africa brand requires a partnership between member state and with the RETOSA Secretariat. This will require a high level of communication, trust and cooperation between all organisations at both national and regional levels.

The key communicators of the Southern Africa brand to external markets will be RETOSA member state tourism offices, ministries of tourism, and tourism operators – through their own marketing activities. This is because, being responsible for marketing their own destinations and tourism services within their destinations, they achieve the widest penetration of external markets on behalf of Southern Africa and are engaged in international marketing on an ongoing basis.

The Southern Africa regional brand should underpin all marketing communications by countries in Southern Africa and thereby enhance individual states’ tourism marketing activities and leverage positive
associations for Southern Africa in the minds of potential visitors for the benefit of all countries in the region.

The regional brand should enhance, not conflict with, individual states’ own brands. Reflecting the regional Southern African signature attributes/characteristics (diversity, wilderness, humanity, climate) in individual countries’ own marketing communications as appropriate is the way to achieve this. This enables individual countries to tell their own unique stories, while at the same time reflecting the regional brand characteristics.

The RETOSA Secretariat will also support member states and communicate the brand through a range of cost-effective regional marketing activities, which should include:

- Development and maintenance of the RETOSA website, with separate sections serving consumers/potential visitors, travel media, and the travel trade
- Digital and social media marketing
- PR/media relations
- Targeted trade shows

A series of themes that appeal to both the wider visitor market and niche markets, in which Southern Africa excels or has a strong story to tell, has been selected to encapsulate the Southern African experience (tourism routes, flora and fauna, history and culture, relaxation and wellbeing, cities, activities and adventure, special interest – birding, hunting, golfing, weddings/honeymoons, cruises).

The RETOSA website, on which every member state is featured, represents the core platform for regional marketing. In order to ensure the most accurate and up-to-date product information and avoid duplication of data or effort, most content should be collected at a national level by member states, to which the regional website should provide links. Links to bookable products are essential to drive potentially interested visitors towards a sale.

This will require the recruitment of a webmaster within RETOSA to develop, manage and maintain the website through regular communication with member states.

A marketing agency is also proposed – to undertake PR, digital and social media marketing in selected target markets on behalf of the region. This
Regional Brand Management

Strong leadership and a clear commitment to the regional brand are required by all member states to ensure its success.

Four key areas have been identified that are important to the effective management of the brand:

- **Understanding**: An internal marketing programme and ongoing capacity-building is required, as well as a regional brand toolkit, to engender an understanding of the role and value of the regional brand by member states. This is also important to enable member states to appreciate the potential power of the regional brand to enhance their own image and support their own marketing activities.

- **Management and Planning**: A brand guardian is essential to manage and monitor the regional brand. This should be the RETOSA Secretariat. A steering group, comprising representatives from member states, should be appointed/elected to oversee the progress of the regional brand and monitor the brand guardian’s performance.

  A regional marketing planning process should be established, from which the major output should be an annual regional marketing plan. This should also address methods for integrating the Southern Africa brand into member states’ strategic thinking and ongoing marketing planning each year.

- **Commitment and Sustainability**: Sustaining commitment to the regional brand will be critical to ensure its impact. This is essential, because the major benefits of a brand accrue over the long-term.

  Key tactics include the recruitment of brand champions and brand advocates and the aforementioned internal marketing campaign and capacity-building programme – all of which are aimed at generating commitment and ensuring it is sustained over the long-term.
• **Evaluation**: Finally, systems need to be put in place to measure the impact and ongoing health of the regional brand. This will determine when the brand needs to be reviewed or refreshed in order to maintain its impact.

### 1.5 Key Issues

Key issues affecting the successful implementation and sustainability of the Southern Africa regional brand include:

- **RETOSA’s capacity** – financial, human and institutional – is limited to manage the regional brand.
- **Variable levels of branding and marketing capacity amongst member states.**
- **RETOSA’s dependency on membership fee and programme-related activities.**
- **Impending review of RETOSA.**
- Some member states have expressed concern about a possible conflict between the Southern Africa regional brand and their own individual country brands.
- The RETOSA Secretariat should be the **guardian of the Southern Africa brand**, but it neither has a role nor the budget to undertake brand marketing campaigns on behalf of the region.
- **Connectivity and access within the region** tends, with some exceptions, to be both time-consuming and costly.
1.6 Critical Success Factors

- **Additional human and financial capacity** is required within the RETOSA Secretariat in order to fully implement this Brand Communications and Management Strategy.
- An **internal marketing campaign and ongoing capacity-building** is required amongst member states to generate understanding of, and commitment to, the regional brand.
- A commitment to implementing the regional brand through their own marketing communications is required by member states.
- This will require a significant level of communication, cooperation and trust – both between member states and with the RETOSA Secretariat.
- A robust **brand management structure** needs to be agreed and resources committed to implementing it by member states.
- A **regional marketing planning process** needs to be established, with an annual regional marketing plan as a key output.
- While several steps can be taken towards increasing tourism into the region through the implementation of this Brand Communications and Management Strategy, a step change will depend significantly on the development and implementation of the proposed regional Univisa and on improved air connectivity within Southern Africa.
- Success will be defined when the following situation exists:
  - Potential visitors in Southern Africa’s main markets have a positive perception of the region.
  - Tourism arrivals into Southern Africa increase.
  - There is widespread awareness amongst Southern Africa’s target markets of the region’s diversity of appeals.
  - Member states demonstrate their ownership, pride and support for the regional brand by implementing it in their own marketing communications and undertaking cooperative marketing campaigns wherever appropriate.
2. **INTRODUCTION: BACKGROUND AND CONTEXT**

### 2.1 Strategic Context

In 2010, the 14 Southern African RETOSA member countries\(^1\) received 2.2% of world tourism arrivals (amounting to 20.4m visitors) and 1.6% of world tourism receipts (amounting to $USD 14.4m). The provisional figures for 2011 show very little change to-date (2.1% and 1.5% respectively).

More significantly, this represented over 40% of all arrivals to Africa and nearly 50% of all African tourism receipts. This makes tourism a significant economic contributor to the Southern African region; and it makes the Southern African region a powerful player in Africa’s tourism economy (See Table 1 below).

| Table 1: Southern Africa Tourism Figures – UNWTO 2010/2011(provisional) |
|-----------------|-----------------|
| **Arrivals ('000)** | **Receipts ($USD million)** |
| **2010** | **2011 (provisional)** |
| Angola | 425 | 719* |
| Botswana | 2,145 | 218* |
| DR Congo | 81 | N/A |
| Lesotho | 414 | 34* |
| Madagascar | 196 | 321* |
| Malawi | 746 | 746* |
| Mauritius | 935 | 795* |
| Mozambique | 1,718 | 1,718* |
| Namibia | 984 | 984* |
| South Africa | 8,074 | 8,339 |
| Swaziland | 868 | 879* |
| Tanzania | 754 | 1,457 |
| Zambia | 815 | 1,462 |
| Zimbabwe | 2,239 | 2,425 |
| SOUTHERN AFRICA | 20,394 | 20,940 |
| **SUB-SAHARAN AFRICA** | 30,982 | 32,810 |
| Southern Africa as % of Sub-Saharan | 65.8 | 63.8 |
| **AFRICA** | 49,738 | 49,865 |
| Southern Africa as % of all Africa | 41.0 | 42.0 |
| Sub-Saharan Africa as % of all Africa | 62.3 | 65.8 |
| **WORLD** | 943,000 | 990,000 |
| Southern Africa as % of World | 3.2 | 3.3 |
| Sub-Saharan Africa as % of World | 3.3 | 3.3 |

\(^*\)=2010 figure  
Source: UNWTO, World Tourism Barometer (Sept 2012)

---

\(^1\) Angola, Botswana, DR Congo, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, South Africa, Swaziland, Tanzania, Zambia, Zimbabwe  
\(^2\) UNWTO, World Tourism Barometer (Sept 2012)
More importantly, long haul travel has been one of the global success stories of recent years, with a faster growth rate than many shorter-haul regions.

After significant slow growth in 2011 (only 0.3%), the future is looking brighter for Africa in terms of projected tourist arrivals.

In the first half of 2012, Africa as a whole recorded a 7% increase, thanks in part to the return of tourist flows to Tunisia (+42%); while destinations in Sub-Saharan Africa (+6%) continued to show strong results, following good growth rates for this sub-region in previous years. Growth was driven by the region’s top destination South Africa (+11%), as well as by Sierra Leone (+17%), Cape Verde (+15%) and Madagascar (+13%). As a result, growth to Africa is expected to be amongst the highest in 2012, with a projected growth rate between 4-6%. (See Table 2 below).

Table 2: Outlook for International Tourist Arrivals

<table>
<thead>
<tr>
<th>Region</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012 projection between</th>
</tr>
</thead>
<tbody>
<tr>
<td>World</td>
<td>2.1</td>
<td>-3.8</td>
<td>6.6</td>
<td>5.0</td>
<td>+3 &amp; 4</td>
</tr>
<tr>
<td>Europe</td>
<td>0.5</td>
<td>-5.0</td>
<td>3.0</td>
<td>6.7</td>
<td>+2 &amp; 4</td>
</tr>
<tr>
<td>Asia and the Pacific</td>
<td>1.1</td>
<td>-1.6</td>
<td>13.2</td>
<td>6.4</td>
<td>+4 &amp; 6</td>
</tr>
<tr>
<td>Americas</td>
<td>2.8</td>
<td>-4.4</td>
<td>6.3</td>
<td>4.2</td>
<td>+2 &amp; 4</td>
</tr>
<tr>
<td>Africa</td>
<td>3.1</td>
<td>3.4</td>
<td>8.5</td>
<td>0.3</td>
<td>+4 &amp; 6</td>
</tr>
<tr>
<td>Middle East</td>
<td>20.2</td>
<td>-4.3</td>
<td>14.2</td>
<td>-7.0</td>
<td>+0 &amp; 5</td>
</tr>
</tbody>
</table>

Source: UNWTO, World Tourism Barometer (Sept 2012)
UNWTO also predicts over the longer term that Africa will be one of the fastest growth regions for tourism by 2030, albeit from a relatively small base – more than doubling its share of world arrivals between 1980 and 2030 (from 3% to 7% of all international tourist arrivals), and increasing its share by 40% over the next two decades between 2010 and 2030 (from 5% to 7% of all international tourist arrivals). (See Table 3 below).

Table 3: Tourism Towards 2030 – Global Overview

Source: UNWTO: Tourism Towards 2030 – Global Overview (Oct 2011)
These suggest significant long-term opportunities for Southern Africa. This makes it all the more important to seek ways in which RETOSA member states and tourism businesses can work together to add value to their own individual efforts through the judicious implementation of the Southern Africa brand. The development of a brand management and communications strategy for the Southern Africa brand should help to enhance positive awareness and visibility for the region over the long-term, thereby capitalising on the potential suggested by UNWTO’s long-term projections for Africa.

2.2 Objectives

This Brand Management and Communications Strategy for the Southern Africa brand aims to underpin and drive forward the RETOSA member states’ vision for tourism, which incorporates the following mission, mandate, overall aim, and strategic objectives for Southern Africa (the region):

RETOSA Mission

- To ensure that the tourism industry becomes the 21st century’s economic driver for SADC through effective development and promotion of the sector.

RETOSA Mandate

- To market and promote tourism in Southern Africa in close cooperation with the region’s National Tourist Organisations and the private sector.

RETOSA Aim

- Overall aim: To create a concrete destination identity in the market in order for the region to compete effectively. RETOSA combines the full spread of stakeholder interests in the region – public and private sectors and the community – under the umbrella of one focused organisation.
  - Branding project aims:
    o To enhance awareness of the Southern Africa region through application of the Southern Africa brand.
    o To encourage stakeholders in member states to own the brand and the brand development process, to be proud of it, and to use it in their own
marketing communications, thereby uniting countries of the region in a cooperative approach to marketing Southern Africa wherever appropriate.

**RETOSA Strategic Objectives**

The primary objective of RETOSA is to facilitate, encourage and assist in the development of policy, strategic, legal and ethical tourism throughout Southern Africa taking due consideration of the overall development of people, the region and the region’s natural and cultural resources. The operational programme for RETOSA shall be lobbying for the removal of barriers to tourism development and growth.

The organisation’s specific objectives are:

- Creation of awareness of the role and impact of RETOSA
- Encourage and facilitate the movement and flow of tourists into the region, applying the necessary regional or 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, co-ordinate 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 desirable and safe tourism 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
- Act as a communication channel between member states and organisations to enhance the region’s tourism and tourist confluence.

The ultimate goal is to:

- Increase the **volume of inbound tourism** to and within the region.
- Create **investment awareness for tourism development** in the region.
- Reduce poverty by **improving the competitiveness and sustainability** of tourism sector in the Southern Africa region.
Commonwealth Secretariat Objectives

This Brand Communications and Management Strategy sits within, and must contribute to, the Commonwealth Secretariat priorities, which are to:

- Reduce poverty
- Improve competitiveness
- Ensure sustainability of the tourism sector

2.3 The Challenge

Following the adoption of the Southern Africa brand by the RETOSA Board, this Brand Communications and Management Strategy’s main challenge is:

- To encourage stakeholders in the 14 Southern African countries to adopt and apply the Southern Africa brand in their own marketing communications by:

  ➢ Embedding a clear understanding of the Southern Africa brand amongst stakeholders in the public and private sectors throughout the 14 Southern African countries.

  ➢ Agreeing with stakeholders in member states of the value of adopting and applying the Southern Africa brand in their own marketing communications.

  ➢ Ensuring that stakeholders understand how to communicate the Southern Africa brand through their own communications – and have the capacity to implement it.

  ➢ Developing a structure for championing, managing and monitoring the brand.

  ➢ Developing a set of sustainable implementation guidelines that will support the RETOSA Secretariat and member states in implementing the brand over the long-term.
2.4 Methodology

This draft Brand Communications and Management Strategy has been developed in cooperation with the RETOSA Secretariat and member states. The combination of member states’ country-specific experience, the RETOSA Secretariat’s Southern Africa experience, and Yellow Railroad’s global experience represents a comprehensive body of complementary knowledge and a robust platform upon which this strategy has been developed. Specifically the following sources have been consulted and consultative steps undertaken in developing this strategy:

**Strategic Documents:**

- RETOSA Final Brand Strategy (2012)
- Southern Africa Regional Tourism Growth and Development Strategy (RETOSA/SADC Feb 2012)
- SADC Infrastructure Vision (2007)
- Transfrontier Parks Final Report (Boundless Southern Africa, May 2012)
- Media statement on the meeting of SADC ministers responsible for tourism, Grand Baie, Mauritius (29 March, 2012)

**Consultation:**

- Meetings with RETOSA Secretariat staff (May 2012)
- Meetings with representatives of all 14 RETOSA member states during Indaba – from the relevant ministry (tourism) and/or the national tourism office (NTO). (May 2012)
- Meetings with thirty tourism industry personnel from major inbound tour operators and travel industry representatives from Southern African states and marketing agencies in Europe and North America during Indaba (May 2012)
- Workshop with RETOSA member states and Southern African tourism industry personnel, attended by c. sixty delegates, during Indaba (13 May 2012)
- Final validation workshop planned for RETOSA states (22-23 Oct 2012)

**Capacity-Building:**

- Capacity-building questionnaire to assess member states branding development needs, prior to the capacity-building workshop, held in Lesotho, Sept 2012.
- Capacity-building workshop delivered for 25 marketing staff from 10 RETOSA member states (11-12 Sept 2012, Lesotho)
3. **KEY ISSUES and CRITICAL SUCCESS FACTORS**

The following were identified as significant issues during the inception stage of this project.

The ability to address these effectively will be critical to the successful implementation, as well as the sustainability, of the Southern Africa brand. These critical issues are outlined below with proposed methods for addressing them ("Solutions 1-5").

3.1 **Challenges Specifically Related to the Southern Africa Brand**

**Issue 1: Branding Skills amongst Member States**

While the Southern Africa brand is generally perceived by member states as positive, understanding of its potential and confidence amongst member states in their ability to implement it were limited. Some states found it hard to see how the Southern Africa brand might add value or be applied. Member states’ capacity in terms of branding is variable: a few appear to have a sophisticated understanding of branding and a track record of effective implementation, but most have limited experience – and therefore knowledge – of destination branding. Similarly their institutional capacity in financial and human resource terms is often also quite limited. This has significant implications for member states’ ability to implement the regional brand.

**Solution 1:**

- The **capacity-building workshop** for member states’ marketing staff (11-12 Sept, in Lesotho) was designed to address these issues and particularly to:
  - Increase member states’ understanding of, and capacity in, destination branding.
  - Instil an understanding of the regional Southern Africa brand and its potential amongst member states’ marketing staff.
  - Inspire confidence in member states’ marketing staff in their ability to implement the regional Southern Africa brand in their own marketing communications.

- **Ongoing capacity-building**, with a specific focus on the implementation of the Southern Africa brand, will be required to ensure that the regional brand is sustainable and effectively implemented by member states.
This will require both **additional capacity in the RETOSA Secretariat** and a leadership-led commitment to the regional brand by member states, which will need to be maintained for years to come.

**Issue 2: RETOSA Secretariat Capacity**

Most member states felt that the RETOSA Secretariat should drive the brand’s implementation and did not see themselves as having a significant role in implementation (in spite of RETOSA’s clear role as facilitator and coordinator rather than implementer and lack of budget for this purpose). However the RETOSA Secretariat does not currently have the human, financial or institutional capacity to fully implement the regional Brand Communications and Management strategy.

While it has an ambitious *Southern Africa Regional Tourism Growth and Development Strategy*, RETOSA’s capacity to implement this strategy is still hampered by its limited financial and human resources. This applies also to the implementation of the regional brand, which will rely primarily on member states for its distribution and market penetration. Nevertheless, as regional brand guardian, RETOSA needs to be both active and seen to be active as the leader in this process. The RETOSA Secretariat’s limited capacity threatens the sustainability and impact of the regional brand, if it is not addressed.

RETOSA’s dependency on membership fees and programme-related activities, which are not consistently rendered across the membership, also limits the RETOSA Secretariat’s ability to undertake sustainable marketing and development programmes required by the region.

**Solution 2:**

- Successful implementation of the regional brand will depend on:
  - **Communication, understanding and cooperation** between member states and between the RETOSA Secretariat and member states’ marketing staff, whereby they seek to identify and pursue mutual opportunities to project the Southern Africa brand.
  - It needs to be understood that such cooperation, which is critical to the long-term sustainability of the regional brand, can only be achieved through a *strengthening of the human, financial and institutional capacity of the RETOSA Secretariat*, so that the Secretariat can encourage, mentor and monitor member
states’ ability to implement the regional brand through their own marketing communications.

- It is important that member state contributions to RETOSA are paid in full and on time. Given that membership contributions represent RETOSA’s main source of revenue, any delay or failure to contribute will further undermine RETOSA’s capacity to deliver this this Brand Communications and Management Strategy.

- The March 2012 meeting held by regional ministers responsible for tourism requested a review of RETOSA, with a view to strengthen or re-organise the regional body. This impending review risks delaying the implementation of this Brand Communications and Management Strategy. However, without this review, the resources required to fully implement this Brand Communications and Management Strategy are unlikely to be available.

**Issue 3: Communication with, and within, Member States**

There appeared to be a considerable disconnect both within and between tourism ministries and NTOs in several member states – and even more so between the public bodies (i.e. ministries and NTOs) and their tourism industry. Although some clearly did have a close relationship in terms of destination marketing, one or two NTOs professed to be unaware of the regional brand. Some felt that this was not relevant for their tourism industry and should only operate at the level of public bodies.

**Solution 3:**

The success of the regional brand will depend on support and implementation by both public tourism bodies and the commercial tourism industry in member states.

Therefore, with respect to the regional brand, **direct communication is essential between the RETOSA Secretariat and national marketing and communications staff in member states.**

Communication between RETOSA and member states is currently limited to a higher level, whereby protocol and formality can prevent messages filtering down to those responsible for marketing and communications in member states. Communication between tourism authorities (ministries and NTOs) and the tourism industry is also variable. This cooperation is particularly important as the commercial sector often achieves the greatest penetration in the international marketplace of all tourism bodies.
Two areas have been identified as critical for improving this situation:

- A more “joined-up” approach within member states, whereby tourism ministries, NTOs and the tourism industry communicate more effectively with each other on issues critical to the country’s tourism economy, is required in some member states. This has to be addressed by members states themselves.

- Direct and open communication between the RETOSA Secretariat and relevant officials in member states needs to be authorised and implemented (e.g. with marketing heads/managers/executives on branding and marketing; with research staff on research and statistics etc.), rather than exclusively via the top levels of member states’ tourism ministries or NTOs.

**Issue 4: Added Value from the Southern Africa Brand**

Member States are necessarily focused primarily on their own national objectives. With limited human and financial resources to achieve their own objectives, member states did not universally perceive the regional brand as potentially adding significant value to their own activities; and some expressed a concern that the regional brand would conflict with their own country brand. For the Southern Africa brand to be successful, member states need to understand how it can add value to – and not duplicate – their own marketing activities.

**Solution 4:**

It will be important to demonstrate how the regional brand can add value to member states’ own marketing activity, and how association with the region as a whole can help individual member states punch above their weight. This can be addressed by:

- An initial **capacity-building workshop** for marketing staff in member states (delivered 11-12 Sept 2012).

- Identifying specific opportunities that can clearly add value to individual nations’ own marketing activities, such as **pan-regional products and themes** (which are included within the Brand Communications Strategy below).

- An **internal marketing** campaign and **ongoing capacity-building** programme, aimed at improving member states’ understanding of the potential of the regional brand and at encouraging their adoption and implementation of it. This process can be started with a capacity-building workshop; but it will require an ongoing programme of education and communication to maintain it. Ongoing capacity-building, coaching and monitoring in relation to branding skills and the implementation of the regional brand will be required.
Issue 5: Sustainability and Impact

Variable, and frequently limited, capacity amongst member states – in terms of branding/marketing skills, human and financial resources – risks undermining the sustainability of the regional brand. If member states do not understand its potential and have the human resource, technical capacity and confidence to implement it, the regional brand will not achieve the distribution or market penetration required to achieve and sustain impact in the marketplace.

Solution 5:

Sustaining the impact of the regional brand will depend on committed and continued leadership from RETOSA as the guardian of the brand. This has significant implications for RETOSA’s institutional, financial and human resource capacity, which is currently limited. The RETOSA Secretariat’s capacity will need to be strengthened to achieve the commitment and capacity required within member states to sustain the regional brand beyond the life of this project.

Long-term sustainability also requires member states to “buy-in” and take ownership of the Southern Africa regional brand, as they will be the primary implementers of the regional brand.

Leadership-level commitment in member states will be required to inspire this “buy-in” to the regional brand within member states. This will be important to encourage implementation of the regional brand through individual member states’ own marketing communications, in order to achieve optimal impact for the regional brand.

3.2 Other Challenges – Related to the Long-Term Success of Tourism in Southern Africa

The Southern Africa Regional Tourism Growth and Development Strategy, prepared by RETOSA, identifies several infrastructural and policy deficits, which risk undermining Southern Africa’s competitiveness as a tourism destination. These were also echoed in consultation undertaken with stakeholders during the inception period in the development of this strategy. Addressing these effectively will require significant levels of almost unprecedented cooperation between member states. They include:

- **Access**: Air access restrictions, cross-border trading restrictions for travel and tourism operators, whereby countries impose measures to protect their own
operators by imposing taxes on operators from other SADC countries: these all constrain the development of the region’s tourism. Cross-border access – particularly by air and road – needs to be made both easier and, in many cases, more affordable. This is fundamental to the development of regional tourism in Southern Africa.

- **Visa:** Visa restrictions for international visitors to some states remain and the liberalisation of the intra-regional visa regime (Univisa) is making slow progress. The Univisa concept is a fundamental building block that needs to be put in place if the potential of Southern African tourism is to be optimised. It can only work – and will only be supported by the World Bank – if all countries commit to implementing it.

- **Human resource weaknesses:** Lack of access to affordable training in most member states results in unskilled and inexperienced staff and poor service levels.

- **Image/exposure:** The region suffers an image problem resulting from the perception of poor health and security and concerns about civil unrest and strife; joint marketing activities are generally ineffective and lack coherence.

- **Investment promotion:** Lack of effective mechanisms to present investment opportunities within the region to potential investors, and variable levels of bureaucracy, contribute to the region under-performing in terms of attracting investment in tourism facilities and infrastructure.

- **Common standards:** Multi-country product packaging is not helped by an incompatible classification and grading schemes in member states, variable facilities, including for disabled travelers, and disparate product and service standards.

- **Joined-up policy thinking:** Tourism touches many different sectors (e.g. economy, environment, defence, transport, infrastructure, security, culture, communications etc.). This needs to be recognised by those in the tourism sector at national levels and an integrated approach needs to be taken to policy-making, where the impact of tourism on other sectors – and vice versa – is taken into account in policy-making debate. Otherwise, sectoral “silo” thinking about tourism in isolation from these other sectors that tourism influences or depends on, will cause tourism economies to under-perform in member states.
• **Funding**: Tourism authorities need to make a persuasive case for funding tourism. This needs to be made in a language relevant to government – i.e. with robust data that demonstrates how tourism addresses government policy objectives.

### 3.3 Critical Success Factors

The following factors are critical to the full and effective implementation of this Brand Communications and Management Strategy:

- **Additional human and financial capacity** is required within the RETOSA Secretariat in order to fully implement this Brand Communications and Management Strategy.
- An internal marketing campaign and ongoing capacity-building is required for member states to generate understanding of, and commitment to, the regional brand.
- Member states must commit to implementing the regional brand through their own marketing communications.
- This will require a significant level of communication, cooperation and trust – both between member states and with the RETOSA Secretariat.
- A robust brand management structure needs to be agreed and resources committed to implementing it by member states.
- A regional marketing planning process needs to be established, with an annual regional marketing plan as a key output.
- While several steps can be taken towards increasing tourism into the region through the implementation of this Brand Communications and Management Strategy, a step change will depend significantly on the development and implementation of the proposed regional Univisa and on improved air connectivity within Southern Africa.
- Success will be defined when the following situation exists:
  - Potential visitors in Southern Africa’s main markets have a positive perception of the region.
  - Tourism arrivals into Southern Africa increase.
  - There is widespread awareness amongst Southern Africa’s target markets of the region’s diversity of appeals.
  - Member states demonstrate their ownership, pride and support for the regional brand by implementing it in their own marketing communications and undertaking cooperative marketing campaigns wherever appropriate.
4. THE ROLE OF A BRAND

4.1 Destination Branding – Role and Value

What is a destination brand and why is it important?

The term “brand” is frequently misunderstood. It is often used, incorrectly, to refer to a product, an image, a logo or a marketing campaign. It is none of these things.

A destination brand is the destination’s competitive identity: it is the essence of the destination that distinguishes that destination from all other destinations. This essence makes the destination distinctive and memorable. It enables potential visitors to recognise the destination and, over time, understand what makes the destination different and appealing. In short, it is the destination’s character, which is the foundation of the destination’s international competitiveness – its brand personality.

Endowing a destination with a consistently recognisable character can apply equally to tourism as well as to purchasers of export products from that destination as well as to potential inward investors: the more it gains a reputation for its positive appeals, the more attractive the destination is to such audiences, for whom it is competing against other places to attract.

In an increasingly competitive world, in which visitors are faced with an ever-growing range of holiday choices, the ability to achieve positive recognition for its appeals gives a destination a competitive edge in this crowded tourism marketplace. But a strong and distinctive brand personality – or competitive identity – is only the beginning of the journey that puts a destination on the map. Putting the destination on the visitor’s map of potential holiday choices requires imaginative and focused marketing.

All marketing by the destination should use the destination’s core brand values to underpin its marketing messages: the destination’s character should be conveyed consistently in all marketing messages in such a way that it reinforces the destination’s image and enables potential visitors to instantly recognise the destination. The destination needs to come across in such a way that it could be nowhere else through the communication of those values that appeal to the market segment on which the marketing communications are targeted.
Understanding what makes a destination distinctive and different from everywhere else, and appealing to potential visitors, is the foundation of a destination brand – of the destination’s competitive identity.

4.2 The Southern Africa Brand – “Experience Southern Africa”

What is the role of a regional brand for Southern Africa and how can it benefit individual countries in the region?

Firstly, it must be understood that the regional Southern Africa brand does not compete with individual countries’ own destination brands. The regional brand’s role is to complement and enhance individual countries’ own brands and marketing activities.

Secondly, quite simply, if the regional brand can achieve significant distribution and come to be perceived as representing a positive visitor experience, then all countries within Southern Africa will be able to leverage the benefits associated with the Southern Africa region. The aim is to present Southern Africa as a desirable region for visitors, which has a certain image and caché that appeals to visitors. Consequently, by locating itself within Southern Africa in its own marketing communications, any country within Southern Africa should evoke the positive values associated with the wider Southern Africa region (brand), which should enhance its own marketing impact.

A comparator might be the South Pacific, which has certain positive associations that “rub off” on to island states within the South Pacific. It also acts as a geographic locator, as well as evoking a certain positive image for potential visitors.

These values, or positive associations, that define the Southern Africa region, which have been identified as defining the Southern Africa brand identity are:

- Diversity
- Wilderness
- Humanity
- Climate

In short, the aim is to ensure that, over time, any mention of Southern Africa should evoke these positive associations in the mind of potential visitors. Like the South Pacific,
they should “rub off” on to member states through member states’ association with, and location in, Southern Africa.

This is an important step in remedying the image deficit of much of Africa in many of its potential markets. In many countries, most coverage of Africa comes from television news, which is invariably negative – conflict, corruption, disease, famine, poverty etc. If Southern Africa can come to be perceived as a positive concept – largely through its wonderful tourism experiences – then there is an opportunity to redress this negative perception and for countries within the region to benefit from their association with, and location in, Southern Africa. This will depend on individual member states embracing and implementing the Southern Africa brand,
5. BRAND COMMUNICATIONS STRATEGY

5.1 Aim

The overriding aim of the Southern Africa regional brand is to position Southern Africa as an attractive multi-faceted but single tourism region and to leverage the appeals of better-known destinations to enhance the attractiveness of others within the region. By presenting the region as representing most of the quintessential appeals of African tourism within the 14 member countries (“the essence of Africa”), the objective is to remedy the image deficit of the region and thereby to enhance its positive image as a whole. This should help stimulate visitor interest in countries throughout the region, thereby spreading the benefits of sustainable economic development through tourism.

The regional brand will be the cornerstone of this approach. It should help enhance awareness of the region and be widely used by stakeholders in member states in a cooperative approach to marketing Southern Africa wherever appropriate.

This should add value to branding activities that are currently being undertaken at individual member state levels and by RETOSA.

5.2 Communications Objectives

The key communications objectives for the Southern Africa brand are:

- To enhance the visibility and positive awareness of the Southern Africa region through application of the Southern Africa brand.

- To encourage stakeholders in member states to own the brand and the brand development process, to be proud of it, and to use it in their own marketing communications, thereby uniting countries of the region in a cooperative approach to marketing Southern Africa wherever appropriate.

- To ensure that the Southern Africa brand achieves as much market impact as possible, from the combined resources of RETOSA member states, and that it remains sustainable through its continued use and, when necessary, refreshment by member states.
5.3 **Strategic Approach**

The Southern Africa brand should underpin all marketing communications about countries in Southern Africa and thereby enhance individual states’ tourism marketing activities and leverage positive associations for Southern Africa in the minds of potential visitors for the benefit of all countries in the region.

A strategic approach is recommended, which utilises, firstly, the existing marketing activities of member states to communicate the regional brand values and, secondly, additional discrete activities at a regional level to project the regional brand as follows:

5.3.1 **Core messages**

- The Southern Africa brand’s core messages must be communicated in all marketing communications about the region, wherever appropriate. These messages stem from the Southern Africa brand’s core characteristics:
  - Diversity
  - Wilderness
  - Humanity
  - Climate

- **Stories** need to be developed by all who promote Southern Africa as a tourism destination (i.e. RETOSA, member states’, NTOs, and the tourism industry in member states), which reflect these core characteristics and elaborate upon them. These stories should be communicated through marketing communications – from PR/media relations through advertising to websites and social media.

- **Member states should ensure that their marketing reflects some or all of these characteristics,** wherever appropriate.
  N.B. This is not about making every member state look the same. Rather, it is about ensuring that member states reflect some of these characteristics in their own way, which simultaneously conveys the unique flavour of their own country and reinforces the character of Southern Africa.

- Some of these characteristics apply more to some member states than others. **Member states need to agree among themselves which states will lead on which of these characteristics** (e.g. two or three countries might have a greater quantum of “wilderness” experiences available to tourists and therefore have more
powerful stories to tell about “wilderness” than others; while other countries might have a more hospitable climate than others, with similarly powerful messages that reinforce the climatic appeal of their destination).

This is not to suggest that countries should restrict their marketing messages to this one characteristic (e.g. “wilderness”); but that those with the strongest tourism offer in this area should lead on that element of the Southern Africa brand and ensure they tell compelling stories about that element of the Southern Africa brand. They should also convey any or all of the other characteristics of the Southern African brand in their own marketing, as they consider appropriate.

5.3.2 Target Audience

The Southern Africa brand should be used to stimulate travel amongst the following target audiences:

- **The domestic and regional market** within Southern Africa:

  This market is made up of the following segments:

  - **Local, lower income residents**: whose travel tends to be primarily for VFR (visiting friends and family) reasons, plus some business travel, rather than discretionary leisure travel. Most expenditure tends to be focused on the informal sector and more price-sensitive than other segments. Most of this type of travel is non-discretionary and driven by necessity rather than leisure.

  Limited disposable income, lack of leisure time and the absence of a culture of travel for pleasure amongst this segment, limits the opportunities available to this segment to travel within their own countries and within Southern Africa. And, as the majority of tourism products outside the informal sector in most countries in the region—particularly accommodation— are priced for the international market, significant price reductions would need to be offered to attract people from this segment to travel internally and regionally. The challenge for this segment is therefore more one of price and motivation, rather than marketing.
Nevertheless, the domestic market can be expected to grow as countries develop economically. Encouraging domestic travel is, for the reasons outlined above, generally most appropriately undertaken by individual country NTOs. However, information can be provided on southern Africa for potential domestic travellers, which encourages them to consider themselves as residents of Southern Africa, as well as of their own countries, on the regional website.

Tourism and accommodation operators in some countries have introduced differential rates for local residents in periods of low occupancy, in order to try to encourage local domestic travel. This principle could be extended and promoted by RETOSA throughout the region, in order to encourage local domestic and regional travel.

A regional campaign, urging this segment to get to know their own region – and most especially their own country first – could stimulate both their interest and pride in their own country and region. This could also deliver an important spin-off effect for external international visitors, whereby local residents would become better-informed ambassadors about their own region (cf. domestic marketing campaigns in: Malaysia – “Cuti-Cuti” campaign (1999); Australia’s “No Leave, No Life” campaign (2009), Canada’s “Locals Know Best” campaign (2009), and New Zealand’s “101 Must Dos for Kiwis” campaign (2010)).

**Strategic aims for this segment:**

- Nurture and introduce people to the local tourism product through **differential pricing** at low periods.
- Encourage people to become **tourism ambassadors** for their country and the region through greater exposure to the region’s tourism experiences.
- Create **awareness** of the Southern Africa brand and the direct impact tourism has on people’s livelihoods.

- **Local, higher income residents and expatriates**: who travel for business and leisure. Living in the region, this segment offers a significant opportunity. Airfares and travel time are considerably less than from the region’s traditional external markets in Europe and North America; they are less restricted by seasonal travel; they can travel for anything from a
few days’ short break to a full two weeks’ holiday, rather than always requiring the longer c. 10 days holiday favoured by longer-haul travellers; and this segment is relatively cost-effective to reach.

As identified above, a regional campaign, urging this segment to get to know their own region – and most especially their own country first – could stimulate both their interest and pride in their own country and region. This could also deliver an important spin-off effect for external international visitors, whereby local residents would become better-informed ambassadors about their own region.

Strategic aims for this segment:
- Stimulate internal domestic and intra-regional travel through a regional marketing campaign encouraging local people to get to know their country and the region more intimately.
- Create awareness of the Southern Africa brand and the direct impact tourism has on people’s livelihoods.

➢ International Markets – Traditional (e.g. Europe, North America):
“Traditional” international markets provide the majority of revenue and foreign exchange – both currently and for the foreseeable future – for Southern Africa. Different countries in Southern Africa have different geographical market priorities, according to history, awareness, access and other market-driven opportunities.

The role of the Southern Africa brand in relation to external international markets is to leverage the benefits associated with the region, so that the region as a whole – and thereby all the countries within the region – has greater visibility in the external marketplace. Ideally this will also increase the propensity for repeat travel within the Southern Africa region.

In spite of being considered “traditional” markets, significant untapped potential remains in both North America and Europe, as well as Australia/New Zealand. This is true of the larger volume-producing markets, such as Germany, UK, and Italy as well as the lower volume markets such as Netherlands, Belgium, Spain et al. (N.B. The global recession and Eurozone crisis has depressed outbound travel in the short-term; but these are resilient markets that will bounce back and can be expected to deliver strong business for Southern Africa over the long-term, once the European economic situation recovers.)
Strategic aims for this segment:

- **Maintain and grow** these markets, which can be expected to continue to provide the bulk of Southern Africa’s tourism for many years to come.
- Many RETOSA member states are already considerably active in the traditional tourism-generating markets of Europe and North America. Therefore RETOSA’s focus should be on **adding value to such existing activity** on behalf of all member states (e.g. via Southern African section at selected trade shows, additional PR, Southern Africa media supplements etc.).

➢ **International Markets – Emerging** (e.g. China, Japan, India, Russia, Brazil):
The “big 5” “emerging” markets for Southern Africa comprise the established outbound market of Japan, which can be characterised as emerging for Southern Africa, as its potential is still relatively untapped with respect to the region, and the four fast-growth economies that are emerging as significant global economic players - China, India, Russia, and Brazil.

While the trend in outbound leisure travel from the four economically emerging markets (China, India, Russia, and Brazil) tends initially to favour travel to iconic world cities in the “first world” (e.g. London, Paris, Rome, New York), opportunities nevertheless exist to begin attracting more adventurous travellers from these markets to Southern Africa. Symbolic icons and theme-based travel, such as wildlife safaris and beaches are likely to have more appeal to this market than place names or specific countries.

Critically, travellers from these countries will mostly seek to buy packages in their home country. This highlights the need to develop a reputable supply chain, which depends on establishing links between outbound tour operators in emerging markets and inbound tourism operators in Southern Africa. RETOSA can perform a useful role here in representing the region at selected trade shows in emerging markets, with a view to encouraging outbound tour operators in emerging markets to include Southern Africa packages in their programmes.

Strategic aims for this segment:

- **Stimulate demand** for Southern Africa and grow these emerging markets. This is likely to be relatively high-spend, but low volume, business for Southern Africa in the short-medium-term, as the economies in these markets grow and outbound travel gradually increases.
• Initial focus should be on developing a supply chain through the establishment of links between outbound tour operators in emerging markets and inbound tourism operators in Southern Africa and the consequent inclusion of Southern Africa packages in their programmes.

5.3.3 Communications Channels

Communications generally represent the most expensive element of marketing. However, digital marketing, social media and PR/media relations are among the most cost-effective opportunities for penetrating markets for organisations of almost any size – even the smallest NTO. Given the limited budgets available for the implementation of the Southern African brand, and the relative cost-effectiveness of these channels, it is recommended that digital marketing, social media and PR/media relations are considered as the major channels for communicating the Southern Africa brand.

This does not mean that the Southern Africa brand should not be communicated through more expensive targeted marketing channels, such as advertising, where these may be used by individual member states. The Southern Africa brand should be communicated ubiquitously and wherever appropriate through all channels used by those who have an interest in – and the opportunity to benefit from – communicating the characteristics of the Southern Africa brand. Rather, it highlights digital marketing, social media and PR/media relations as the most cost-effective channels on which communication of the Southern Africa brand should focus.

Digital Marketing and Social Media

In digital marketing and social media, the cost lies much more in labour than in financial resource. A dedicated human resource is required to seek out appropriate stories and communicate them via these media in an interesting, entertaining and up-to-date way for the target market. This resource (person/agency) should also be stimulating others with an interest in the region (e.g. tourism operators and residents) to create interesting and entertaining stories or “snippets” about the region, which can be picked up and recycled by social networks and other interested parties.

But, in order to optimise the value of digital marketing and social media the approach needs to avoid being seen as “official” or “corporate”, otherwise it will not have credibility in the eyes of the potential market, which wants “real” content that is
interesting and inspiring, not a corporate press release that comes with the obvious stamp of official approval. Success in the social media world is about imagination, dynamism and engagement; personal insight is more powerful than authoritative sanction.

PR/Media Relations

PR is a particularly cost-effective and credible way of generating publicity for a destination. In addition to member states’ own individual activities in this area, RETOSA should:

- Issue regular press releases and write a regular blog with inspiring, visitor-relevant content about the region (See also 5.4.1 Website/Digital Marketing below). These should include stories based on the themes and target the niche markets identified under Themes and Niche Markets below, and they should reflect the regional brand characteristics (diversity, wilderness, humanity, climate) – either separately or all together as appropriate for the market. (N.B. The RETOSA Secretariat will depend on member states to provide inspiring stories for these articles and blogs. It is therefore only as good as the weakest link in the membership chain.)
- Organise a series of theme-focused familiarisation trips for international tour operators and travel agents in key markets who are selling Southern Africa.*
- Organise visits to Southern Africa for travel writers, bloggers, and broadcast media, who are interested in writing about the region.*
  [*N.B. These visits will need to be carefully scheduled with member states, who would be expected to host these visitors, in order not to duplicate member states’ own activities and to ensure that they complement – and are additional to – visits that member states can generate from these influential intermediaries themselves.]
- Appoint a marketing agency to undertake external marketing of the region. The key focus for this agency should be on the more cost-effective methods of marketing communications, particularly PR/media relations, digital marketing and social media, as identified above. The focus should be on the large tourism-producing markets (western Europe and North America). Subject to budget and agreement among RETOSA member states, some activities might also target selected emerging markets. But this should only be undertaken in markets where supply chain links exist between outbound tour operators in the source markets and inbound tour operators in some Southern African countries; otherwise, without access to bookable product, such consumer marketing will be wasted.
5.3.4 Delivery Bodies

- Given its limited capacity – in financial, human and institutional terms – the RETOSA Secretariat cannot be relied upon to communicate the Southern Africa brand on its own. Ideally the RETOSA Secretariat should lead, inspire, coach and monitor with respect to the implementation of the Southern Africa brand. However, without additional resource to undertake these important activities, the RETOSA Secretariat’s role is restricted to inspiring the development of the Southern Africa brand and, through ad hoc externally funded support (e.g. via the Commonwealth Secretariat), to launching the initial stage of implementing the Southern Africa brand – through this Brand Communications and Management Strategy.

- Most marketing of tourism in the region is undertaken by individual member state NTOs and by the tourism industry in each country. Their role is to attract visitors to their countries. Given the potential benefits that they can leverage from association with the Southern African characteristics identified as comprising the basis of the Southern Africa brand, it is in each member state’s interest to convey these Southern African characteristics through their own marketing (diversity, wilderness, humanity, climate). This is where the greatest distribution of the Southern Africa brand messages can be achieved: through individual countries’ own marketing communications. And the beauty of this is that these Southern African characteristics should, if communicated creatively, enhance each individual country’s own brand, not dilute it.

- Similarly, the tourism industry in each Southern African country needs to be persuaded to convey appropriate characteristics of the Southern African brand in their own marketing communications (diversity, wilderness, humanity, climate). In this way, the sum of the individual parts will have greater impact than the region as a whole. This is a task for individual NTOs to undertake through dialogue with the tourism industry in their own country.

- In light of RETOSA’s limited financial resources to undertake a marketing campaign to promote the Southern Africa brand, and in view of the fact that most destination marketing is undertaken by NTOs and the tourism industry in each country, it makes sense for the Southern Africa brand characteristics (diversity, wilderness, humanity, climate) to be communicated primarily – and extensively –
by individual NTOs and the tourism industry in their own marketing communications. This does not require a separate campaign for Southern Africa, it merely requires these organisations and businesses to convey the Southern African brand characteristics in their own marketing communications. Therefore, member states, and ideally also their inbound tourism operators, should be the primary communicators of the Southern African brand characteristics through their own marketing communications.

- This will require a clear understanding of the benefits of the regional brand by individual countries, ongoing capacity building and monitoring, and a clear cooperative structure for managing the brand. These are identified in the Brand Management Strategy below.

- Ideally, a PR/marketing agency should be appointed to undertake these social media and PR activities on behalf of RETOSA in selected markets (subject to budget – see below).
Chapter 5.3 above has outlined the strategic approach to the communication of the Southern Africa brand. This chapter defines more specifically the tools and techniques to be used to do this. These include a range of tactics and media channels, which are considered to be most cost-effective. For this reason, PR/media relations, social media, digital marketing and joint stands at trade shows represent the main tactics and media channels recommended.

A table of proposed activities, with indicative costs, targets, timescales, and evaluation methods, is also included at the end of this chapter.

While individual member states’ own marketing communications are recommended as offering the most ubiquitous means of conveying the Southern African brand characteristics, the following are recommended as discrete tactics for conveying the Southern Africa brand. These are additional to activities undertaken by individual states in pursuit of their marketing own goals, which will need to be undertaken on a collective basis. It is envisaged that the RETOSA Secretariat will be involved in managing these, but with significant input from member states. The process for developing, managing and monitoring these tactics is outlined in the Brand Management Strategy below.

5.4.1 Website/Digital Content

A Southern Africa website/portal should be developed that includes both consumer, and separate trade and press, sections (i.e. targeting overseas outbound tour operators interested in selling Southern Africa and journalists interested in writing about Southern Africa).

This should provide regional information that complements, but does not duplicate, member states’ own websites and signposts visitors to members’ own websites and to other more detailed sources of information; and it should provide links to bookable tourism product where these are not provided by members’ own websites (i.e. most bookable product will be accessed via individual country website, but certain products – such as pan-regional tours etc. – should be featured on the regional site).

This can be developed on the basis of the existing RETOSA website.

(N.B. Key data, such as climate, visa requirements, health advice, language, voltage, currency, accommodation, sights and attractions, and other questions frequently asked
by intending visitors, should be handled at an individual country level by member states on their own websites. Nevertheless, RETOSA could usefully advise all member states of a list of frequently asked questions and devise a template, which all could use on their websites.)

- **The consumer-facing site should contain:**
  - An inspiring overview of, and introduction to, Southern Africa, with an interactive map of the region on the landing page.
  - **Consumer-driven information** on Southern Africa – e.g. on:
    - specific themes and for particular niche markets (see below)
    - events in the region
    - how to book (e.g. via links to both regional tourism products and operators and a list of outbound tour operators worldwide selling Southern African destinations)
    - transport within the region – by air, road, and boat
    - events calendar
    - and, eventually, information on applying for a Univisa
  - A standardised profile of each RETOSA member state’s tourism offer with a link direct to its national website (as is currently the case).
  - Links to individual country websites for further information.
  - Links to bookable tourism products, wherever appropriate.
  - A list of tour operators worldwide featuring Southern African destinations, so that potential visitors can be furnished with the information that they need and driven closer to a sale.
  - A regular blog on items of interest to potential visitors. Information content needs to be supplied by member states. In order to ensure credibility in the eyes of consumers, this needs to be maintained up-to-date and constantly refreshed. (N.B. Articles still sitting on the site that are a month or more old will do more damage than no articles at all.)
  - A social media section, where previous visitors can upload their comments, photos (e.g. via Flickr), videos (e.g. via Vimeo), with links to sites such as TripAdvisor etc. This type of “real” feedback is becoming increasingly common and expected. It offers a significant opportunity to achieve extensive, free and – being first-hand accounts and images – a very credible addition to traditional paid-for marketing.
  - A Facebook page on Southern Africa, which is linked to, and complements, the social media section. This will enable previous visitors to recruit “friends”, exchange comments on their trip and answer questions about travelling in the region – all of which amounts to significant additional “free” marketing.
The trade and media sections of the site should contain:

- Key contact/s in RETOSA for further information.
- A basic online photo library for travel journalists and overseas tour operators, with high resolution images that can be downloaded and used for editorial and destination-promotional purposes free of charge (i.e. for inclusion in tour operators’ brochures, websites and in their own marketing on behalf of the region/countries in the region).
- A free newsflash service. RETOSA members should be able to upload newsflashes targeting international tour operators and travel journalists.
- A regular trade blog summarising key news items relevant to the travel trade (Southern African inbound and international outbound). This must be regularly updated and refreshed to be credible (See consumer-facing site proposals above). This could act as the introductory section, followed by an opportunity for member states and other relevant organisations, such as tour operators, to post individual newsflashes about their country/tours/tourism products.
- A regular press blog targeting international travel media. This should be a mix of the consumer and trade blogs, edited appropriately to target the trade press.
- Links to relevant sites for further information (e.g. SADC et al.)
- Information on where to find other useful data (e.g. regional statistics – on the corporate section of the RETOSA website – etc.)

- The website should be strongly branded under the ‘Explore Southern Africa’ banner, with images and content that reflect Southern Africa’s brand characteristics/values of:
  - Diversity
  - Wilderness
  - Humanity
  - Climate

- The following protocols should be observed, in the interests of cost-efficiency and consumer clarity:
  - Individual destination content should be collected, stored, managed and updated at a local, rather than regional, level. This is more efficient, avoids duplication, and maximises the chances of the information being as up-to-date as possible, as it is collated by those with on-the-ground knowledge and the most interest in its currency and accuracy (i.e. individual member states).
It also unequivocally allocates responsibility for data collection and management – and therefore its currency and accuracy – to a single organisation (e.g. individual country NTO), thereby avoiding any confusion over who is responsible for presenting the most accurate, current, and appealing information to potential visitors and overseas tour operators.

- The RETOSA Secretariat should be responsible for monitoring the website, encouraging member states to provide relevant, up-to-date content, and for populating the regional pages about Southern Africa,

- The Southern Africa Regional Tourism Growth and Development Strategy has identified that the maintenance of the tourism product database should be a responsibility devolved to member states’ tourism offices and departments. However, there is a need for constant monitoring of the site, updating, enhancement and expansion, as well as progress-chasing to encourage member states for their data input. While the former (data input, database maintenance, and content provision) is the responsibility of member states, the latter (site monitoring and development, and progress-chasing for relevant up-to-date content from member states) is the RETOSA Secretariat’s role.

- In order to convert interest into sales as frequently as possible, links should be provided on the website to bookable tourism products. Pure information is interesting, but in the digital era, it is increasingly ephemeral, as consumers expect to be able to search and buy – or at least be provided with up-to-date prices and the opportunity to purchase – within a minimum number of clicks. Links to local businesses should be provided by member states – via their own databases – whereas links to regional products and information should be the responsibility of the RETOSA Secretariat.

- N.B. The anarchic nature of the internet, and particularly the widespread use of search engines to locate information, defies any concept of a traditional hierarchy in terms of consumer access to information (e.g. entering via a regional portal, then being directed down to each country and then to individual businesses within that country etc.). However, what is important is that there are clear links for those who do access the regional website from there to relevant information, particularly member states’ own websites, and vice versa.
A skilled webmaster is required within the RETOSA Secretariat to manage the development and ongoing maintenance of this website. (See Brand Management Strategy below for further details.)

5.4.2 Themes and Niche Markets

Compelling themes, in which the Southern Africa region can deliver outstanding tourism experiences and which have demonstrable visitor appeal, should be developed as follows. These should form the basis for sections on the regional website, for PR stories, and, where appropriate in terms of cost-effective distribution opportunities and affordable, brochures. These should be promoted via the channels and tactics identified above and below in this section of the Brand Communications Strategy – particularly via sections on the website, PR, social media etc. This will reinforce the region’s diversity through the wide range of its visitor appeals.

- **Tourism routes and excursions** in Southern Africa. These should be realistic in terms of accessibility, cost, and number of days – taking visitor behaviour and tolerance into account. This should include Transfrontier Conservation Area routes.

- **Flora and Fauna:**
  - **Wildlife:** A brief description of major national parks and conservancies and an overview of the main species to be found within each should be featured (N.B. Links to each park and conservancy should be included)
  - **Flora:** Highlights of the different types of flora and vegetation and the landscape in which they thrive should be featured.

- **History and Culture:** Southern Africa comprises a vast swathe of different cultures, each with its own customs and tradition. While the website cannot afford to cover the details of every cultural group, it should provide an overview of the range of different cultures that exist in the region. (N.B. Presentation of the region’s culture should be realistic – in that it should be made clear where visitors are and are not welcome, so that they are not encouraged to believe that they can intrude upon others’ daily lives in a way that is unwelcome to the host community and thereby disrespectful of their culture.)

There are a significant number of UNESCO World Heritage Sites in Southern Africa. Production of an online map of these sites, with summary information and links to each heritage site’s website, would add a dimension to the region that is widely
under-appreciated. This should, at a minimum, feature on the regional website. If sufficient demand is identified, it could also be distributed in a printed version via requests to the website, via member states, and via trade shows.

- **Relaxation and Wellbeing:** A growing market niche, this could cover beaches, beach and inland resorts, and spas, with links where appropriate (e.g. to spas and resorts).

- **Cities:** Although Southern Africa’s cities tend not to be the major destination for leisure visitors to the region, there are many fascinating historical, cultural and other entertaining attractions that could be presented to increase the appeal of the region’s cities for visitors. To this end a summary of the highlights of major cities in each member state under a “Southern Africa’s Intriguing Cities” (or similar) title should be prepared – again with links to individual cities’ (or NTOs’) own websites.

- **Activities and Adventure:** Both “soft” (e.g. walking, swimming) and “hard”/adventurous activities (e.g. scuba-diving, hiking, sailing, surfing, windsurfing, kite-surfing, white-water rafting, bungee-jumping etc.) should be featured, again with links to tourism operators and bookable product.

- **Special Interest:** Special interest visitors tend to be different from adventure tourists, primarily in that the main motivation for their trip is to pursue their interest. While this may sometimes also be true of adventure tourists (e.g. hikers, scuba-divers etc.), it is more predominant amongst special interest travellers in the following areas:
  - Birding
  - Hunting
  - Golf
Again, links to tour operators providing such special interest tours would be very useful and consumer-friendly.

- **Other Niches:** Niche markets that are growing, and in which Southern Africa is well placed to increase its share, include:
  - Weddings and honeymoons:
  - Cruises
Again, links to tour operators selling these products would be very useful and consumer-friendly.
5.4.3 Trade Shows

An opportunity exists for Southern African countries to combine under a regional umbrella at international trade shows – as a dedicated Southern African section. This can enhance the region’s impact, as well as enable smaller countries with more limited resources to mount an otherwise unaffordable presence at international trade shows and present their offer to potential trade buyers/programme developers from worldwide markets.

In spite of a well-documented, growing trend towards independent travel and dynamic packaging amongst travellers in Southern Africa’s international markets, this trend applies more to destinations that are easier to book and travel in, that are often closer to home, and destinations with which travellers tend to be relatively familiar. However, the majority of international leisure travellers to Southern African destinations still rely on tour operators to package destinations in Southern Africa; and most buy their holidays from tour operators (and often through travel agents) as a “traditional” package, rather than as a package dynamically constructed online. This underlines the continuing importance to Southern African destinations of outbound tour operators in international markets.

In light of this market behaviour, the major aims of participation in trade shows are:

- To promote and encourage interest in the region amongst outbound tour operators in international markets.
- To develop a supply chain between outbound tour operators in source markets and inbound tourism operators in Southern Africa; and thereby to increase the number of Southern Africa programmes and itineraries available for sale in international markets.

Proposed Trade Fair Strategy:

Different approaches are recommended for participation at trade shows in established markets and those in emerging markets. In light of current exhibition participation by individual member states, it is recommended that RETOSA adopts the following approach to trade show participation, in order to maximise the potential for Southern Africa.

N.B. Given the existing attendance at many of these trade fairs by member states and Southern African tourism operators, and the consequent need to avoid duplication and
ensure complementarity, member states should consider drawing up a list of events at which they would welcome a Southern Africa presence. This should be part of an annual RETOSA marketing planning exercise, which is addressed under Brand Management Strategy below.

Global Markets:
The major trade fairs attended by the largest number of international trade buyers are the World Travel Market (WTM), London, in November, and ITB, Berlin, in March. While some larger countries will always wish to have their own stand at these shows, a Southern African section should be planned in close proximity to the larger Southern African countries’ stands, in order to achieve a degree of synergy for the region and so that all can benefit from this “geographical” proximity.

- **WTM, London and ITB Berlin:**
  These are the two major global trade fairs at which the largest number of individual RETOSA member states has a presence. RETOSA should coordinate and book a Southern African section and sub-let space to member states. This could include a range of services – from full participation by member states to brochure racking and representation by RETOSA Secretariat staff.

  The aim of this is to pull member states together under a regional banner, in order to maximise the region’s impact within these very busy fairs.

- **USTOA USA:**
  Although some RETOSA member states attend USTOA, RETOSA could perform a useful service to member states by mounting a Southern Africa presence and representing the region at USTOA. (N.B. USTOA operates a meetings schedule, rather than free-flowing exhibition format. RETOSA participation could add value on behalf of non-participating member states and take advantage of the opportunity to hold individual meetings with tour operators on behalf of the Southern Africa region.)

Emerging Markets:
The “big 5” emerging tourism growth markets, such as Russia, China, India and Brazil (and the more established market of Japan), may not currently offer significant tourism volume for Southern Africa as a whole, other than for one or two countries; and many of the trade buyers from these countries can be reached by attending the larger global trade fairs such as WTM and ITB. However, RETOSA could undertake a valuable
pioneering approach in targeting selected emerging markets for development, subject to budget, under a Southern Africa umbrella on behalf of members.

Few RETOSA member states, apart from the larger destinations, attend trade shows in emerging markets. RETOSA could offer a hierarchy of market-entry services – from enquiry servicing through brochure racking to stand space within a Southern Africa section. This should be coordinated with those member states who do exhibit at these shows, so that there is a synergy between individual member state exhibitors and a wider Southern Africa presence.

- Member states need to agree on the markets to be targeted, and on the tactics to be used (again subject to budget) in order to achieve a level of market penetration for the region that would otherwise be unattainable within existing budgets. Established trade shows in target markets should be the first point of entry, as the supply chain needs to be developed through contacts between outbound tour operators in emerging markets and inbound tour operators in Southern Africa. Major trade shows in significant emerging markets include: - ITB Asia
  - JATA Japan
  - MITT Moscow
  - ABAV Brazil:

- **Niche Markets**:
  Similarly, RETOSA should consider taking a Southern Africa stand at certain niche exhibitions covering niche activities in which Southern Africa excels in key target markets (e.g. scuba-diving, birding, trekking/hiking, weddings & honeymoons). As several member states already attend some of these exhibitions, it is important that any Southern Africa presence should complement, not duplicate, member states’ own activities.

The aim of this is to mount a comprehensive Southern Africa presence at key fairs targeting niche markets in which Southern Africa has a particularly competitive product offer.

Several member states and Southern African tourism operators also attend the annual International Luxury Travel Market, which is by invitation only. RETOSA should explore the opportunity of being invited to represent the Southern Africa region at this fair, which offers a significant opportunity for many Southern African countries.
Significant shows targeting these niche markets in major potential markets for Southern Africa include:

- **Luxury travel**: International Luxury Travel Market (ILTM);
- **Scuba-diving**: Dive Show UK; DEMA Las Vegas;
- **Birding**: Birdfair UK;
- **Weddings and honeymoons**: Wedding Show London;

5.4.4 **Co-Branding**

The three main ways in which both individual member state NTOs and the travel industry can project the regional brand through co-branding are:

- By conveying the **regional brand characteristics** (diversity, wilderness, humanity, climate) in their own marketing communications – from their own websites to PR and advertising – through stories, marketing messages and imagery, as described above.
- By including the regional **Southern Africa brand logo** ("Experience Southern Africa") in their own marketing communications – in digital/online and printed communications, as well as posters and banners at trade shows and in broadcast media.
- By working together to support tour operators to develop **multi-country packages**. This is addressed further below (5.4.5 Product Packaging)

The regional brand **toolkit** will be an essential tool to enable NTOs and the travel industry understand how to do this in practical terms; so too will an **internal marketing campaign**, designed to build capacity through seminars, coaching and mentoring for destination marketing personnel in member states. (These tactics are both described below in the **Brand Management Strategy**, in chapter 6.4.1 **Understanding**


5.4.5 Product Packaging: Multi-Country Tours

Tour packages are usually put together by international outbound tour operators, based on the preferences and holiday duration of their home markets, in conjunction with inbound tour operators, who understand the practicalities of their destination. And tour operators’ decisions to include a new programme (particularly a multi-country programme) in their sales offer is based on a hard-nosed assessment of sales potential versus the cost of setting it up, marketing and operating it. Nevertheless, tour operators’ confidence in packaging multi-country tours could be increased through support and information from both RETOSA and individual member states as follows:

- The notion of multi-country tours could be encouraged by RETOSA developing a selection of sample itineraries with inbound Southern African tour operators – ideally on a themed basis – and posting these on the regional website. This should be aimed at inspiring international outbound tour operators that such multi-country tours are indeed feasible and, above all, practical – taking the major constraints and practicalities (which are hard to discern from outside the region), such as accessibility, border controls, distances, road conditions, flight costs etc., into account.

- Efforts should be made by individual member states to remove and reduce such constraints to the development of multi-country packages.

- Member states should also identify opportunities to develop multi-country tours and support their development and marketing – e.g. through hosting fam trips for selected tour operators and travel agents and for targeted travel writers and bloggers. Once in place, member states should inform RETOSA, so that these itineraries can be posted on the regional website as a saleable package.

While most travellers to Southern Africa are likely to continue to focus for the foreseeable future on one – and, to a lesser extent – two countries, dependent on time, accessibility and affordability, the opportunity to increase, rather than displace business from potential visitors who might like to visit several countries should be appreciated and pursued. This may be limited in the short-term in light of the constraints identified. But demonstrating the success of existing multi-country tours to generate additional business, rather than dilute the existing market for individual countries, will help to sensitise tour operators and destinations to this opportunity. In the short-term, “destination pairs” offering a complementary experience that is accessible (e.g. “bush and beach” – South Africa and Mozambique) illustrate the potential for increased business; in the longer-term, a reduction in border formalities (e.g. Univisa), improved flight connections and more competitive pricing will be important to underpin such growth in multi-country tours.
### 5.4.5 Summary of Proposed Tactics and Implementation Guidelines (incl. Costs, Targets & Evaluation) - Brand Communications Strategy

The following tables represent a summary of tactics proposed to implement the Brand Communications Strategy. This includes indicative costs, targets, timescales and evaluation methods. (N.B. Costs are both indicative and represent a basic market-entry level. They are clearly scalable upwards, subject to required impact and available budget.)

While this represents a menu of opportunities, the regional campaign, website portal, and marketing/PR agency are proposed as priorities. With regard to trade fairs, RETOSA could make more impact in emerging markets, where few, if any, Southern African destinations are represented. The need here is to encourage outbound tour operators to package Southern Africa in their programme portfolio. Pioneering such links that establish a supply chain in these emerging new markets is an important area in which RETOSA can add significant value.

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>COST – $USD (Indicative)</th>
<th>TIMESCALE (Approx.)</th>
<th>TARGET</th>
<th>EVALUATION METHOD</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. DOMESTIC MARKET (Local Residents – Low Income)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Regional campaign to:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Encourage tourism operators to offer differential (lower)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>prices for local residents in low periods</td>
<td>Cost neutral</td>
<td>1-3 years</td>
<td>- Campaigns in 5 member states by year 3</td>
<td>- Feedback from member states on:</td>
</tr>
<tr>
<td>- Promote awareness and take-up of these offers by local</td>
<td>to RETOSA – funded by</td>
<td></td>
<td>- Improved awareness of tourism’s value amongst local residents</td>
<td>- Number of tourism operators participating</td>
</tr>
<tr>
<td>residents</td>
<td>member states</td>
<td></td>
<td></td>
<td>- Take-up of offers by local market</td>
</tr>
<tr>
<td>- Sensitise local residents to the value of tourism to their</td>
<td></td>
<td></td>
<td></td>
<td>- Changes in attitudes to tourism amongst local residents in member states</td>
</tr>
<tr>
<td>livelihoods</td>
<td>Cost neutral</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>2. REGIONAL MARKET (Local Residents – Higher Income &amp; Expatriates)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Regional campaign (PR and social media)to:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Encourage regional residents to get to know their own</td>
<td>Included in PR</td>
<td>1-3 years</td>
<td>- 10% increase in regional travel for leisure purposes to each member</td>
<td>- Feedback from member states on:</td>
</tr>
<tr>
<td>countries and the region</td>
<td>under 3. International</td>
<td></td>
<td>state by year 3 *</td>
<td>- Regional residents’ arrivals</td>
</tr>
<tr>
<td></td>
<td>Markets – “Traditional”</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Regional campaign (PR and social media)to:</td>
<td>Included in PR</td>
<td>1-3 years</td>
<td>- Improved awareness of tourism’s value amongst local residents</td>
<td>- Feedback from member states on:</td>
</tr>
<tr>
<td>- Sensitise local residents to the value of tourism to their</td>
<td>under 3. International</td>
<td></td>
<td></td>
<td>- Changes in attitudes to tourism amongst local residents in member states</td>
</tr>
<tr>
<td>livelihoods</td>
<td>Markets – “Traditional”</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### 3. INTERNATIONAL MARKETS – “TRADITIONAL” (Europe & N. America)

<table>
<thead>
<tr>
<th>Activity</th>
<th>Cost Details</th>
<th>Time Frame</th>
<th>Benefits/Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Development of Southern Africa website portal</strong>&lt;br&gt;(incl. appointment of webmaster)</td>
<td>- c. $20-30,000 (year 1 set-up)&lt;br&gt;- Ongoing costs covered by webmaster (N.B. webmaster salary cost not incl.)**</td>
<td>- Year 1 set-up&lt;br&gt;- Ongoing</td>
<td>- Inspirational, informative and easily navigable portal w 3 separate sections for consumers, travel trade, and media&lt;br&gt;- Feedback from member states (qualitative)&lt;br&gt;- Site usage: number of visits; click-throughs to member states and other links; dwell-time (quantitative)</td>
</tr>
<tr>
<td><strong>Appoint marketing/PR agency</strong></td>
<td>c. $65-80,000 p.a. (excl. hosting of tour operator familiarisation and journalists’ visits ***, exhibition stands, PR events, conferences, presentations etc.)</td>
<td>Year 1 and ongoing</td>
<td>- 2 press releases p. month in 5 markets (regional and international)&lt;br&gt;- 5 tour operator fam trips p. a&lt;br&gt;- 5 journalists’ / bloggers’ trips p.a.&lt;br&gt;- Assessment of marketing/PR agency performance by RETOSA Secretariat</td>
</tr>
<tr>
<td><strong>Social media campaigns</strong></td>
<td>Incl. in marketing/PR agency costs and webmaster salary</td>
<td>Year 1 and ongoing</td>
<td>- Ongoing social media campaign in 5 markets (regional and international)&lt;br&gt;- Assessment of marketing/PR agency performance by RETOSA Secretariat</td>
</tr>
<tr>
<td>ACTIVITY</td>
<td>COST – $USD (Indicative)</td>
<td>TIMESCALE (Approx.)</td>
<td>TARGET</td>
</tr>
<tr>
<td>----------</td>
<td>--------------------------</td>
<td>---------------------</td>
<td>--------</td>
</tr>
<tr>
<td><strong>4. INTERNATIONAL MARKETS – “TRADITIONAL” (Europe &amp; N. America) (cont.)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Trade fairs (general travel) ¥</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| o WTM, London (Nov) – global audience | From c. $5,000 – based on basic 9m² shell stand | As required | ° No of stand partners  
° No of stand visitors  
° Quality of stand enquiries | Assessment by RETOSA and member states |
| o ITB, Berlin (March) – global audience | From c. $7,000 based on basic min. shell stand @ 20m² | As required | Ditto | Assessment by RETOSA and member states |
| o USTOA Marketplace, USA (Dec) – national audience (membership required) | c. $1,000 regn fee | As required | ° No of meetings w tour ops  
° Quality of mtgs | Assessment by RETOSA |
| • Trade fairs (niche markets) ¥ | | | | |
| o ILTM-luxury, mobile (Dec) – global audience | N/A – by invitation only | As required | ° No of meetings w tour ops  
° Quality of mtgs | Assessment by RETOSA |
| o Dive Show, Birmingham, UK (Oct) – national audience | From c. $3,500 – based on basic 9m² shell stand | As required | ° No of meetings w tour ops  
° Quality of mtgs | Assessment by RETOSA |
| o DEMA, dive show, Las Vegas (Nov) – national audience | TBA | As required | ° No of meetings w tour ops  
° Quality of mtgs | Assessment by RETOSA |
| o Birdfair, Rutland, UK | TBA | As required | ° No of meetings w tour ops  
° Quality of mtgs | Assessment by RETOSA |
| o London Wedding Show (Sept) | TBA | As required | ° No of meetings w tour ops  
° Quality of mtgs | Assessment by RETOSA |
| **5. INTERNATIONAL MARKETS – EMERGING (China, Japan, India, Russia, Brazil)** | | | | |
| • Trade fairs (general travel) ¥ | | | | |
| o ITB Asia, Singapore (Oct) – regional audience, Asia | From c. $5,000 – based on basic 9m² shell stand | As required | ° No of stand visitors  
° Quality of stand enquiries | Assessment by RETOSA |
| o JATA (Sept/Oct) – national audience | From c. $7,000 | As required | Ditto | Ditto |
| o MITT, Moscow (March) – national audience | From c. $6,000 | As required | Ditto | Ditto |
| o ABAV, Rio de Janeiro (Oct) – regional audience, South America | On application | As required | Ditto | Ditto |
Notes and Assumptions

* The ability to measure targeted changes in visitor figures effectively depends on the development of improved data collection by many member states – particularly with regard to purpose of visit.

** No salary costs (e.g. webmaster) are included in these costings. Costings cover programme and agency costs only. Webmaster salary costs are included in the Brand Management Strategy below.

*** Hosting of tour operator familiarisation trips and journalists’/bloggers’ visits is expected to be covered by member states. The cost of hosting is therefore not included in these figures.

¥ The cost identified above for trade fairs is based on what might be a reasonable contribution/underwriting of the regional stand by RETOSA after reimbursement for a large percentage of the costs by member states.

N.B. This cost to RETOSA depends on member states being willing to contribute. Also, as it is an indicative outline only, it is scalable subject to additional space or exhibition stand services and décor required. It is based, in most cases, on a basic minimum estimated requirement at each fair.
5.5 Brand Communications Strategy – Critical Success Factors

The main challenges Southern African countries face in successfully implementing the regional brand – and thereby achieving the objectives of remedying the regional image deficit and gaining positive market impact for the region – are the limited regional marketing budget and each individual country’s own limited resources which are necessarily focused on its own objectives.

The following therefore need to be achieved in order for the regional brand to achieve traction and create impact and awareness over and above the combined efforts of member states:

- A clear understanding of the potential offered by the regional brand – for both individual member states and the region as a whole.

- A commitment by all member states to convey the regional brand characteristics wherever appropriate through their own marketing communications (diversity, wilderness, humanity, climate) – through the creation and dissemination of stories and marketing messages, which reflect these regional characteristics in a way that is unique to their own countries.

- An annual regional marketing plan, devised and agreed by all member states (e.g. including, PR, trade familiarisation visits, journalists’ visits, a trade fair strategy, web protocols etc.).

- Ongoing capacity-building, coaching and mentoring in relation to branding, marketing and implementation tactics for the regional brand, so that member states’ marketing leaders and executives can identify opportunities for implementing the regional brand themselves and feel confident in doing so.

- Ongoing monitoring of the application of the regional brand by member states and its impact in the marketplace.

- A high level steering group to oversee the progress of the regional brand’s implementation and evaluate its impact (See Brand Management Strategy below).

- An appropriate level of skilled resources in the RETOSA Secretariat to implement, manage and monitor the regional brand.
6. **BRAND MANAGEMENT STRATEGY**

6.1 **Aim**

The aim of this brand management strategy is to outline a process for managing and monitoring the Southern Africa brand to ensure that it achieves its communications objectives (as outlined above in the Brand Communications Strategy) and remains sustainable.

6.2 **Management Objectives**

The main brand management objectives are to:

- Ensure a robust process is in place for managing and monitoring the Southern Africa brand.

- Ensure this process is sustainable over the long-term.

- Secure an understanding of, and commitment to implementing, the Southern Africa brand by RETOSA member states.

- Manage the Southern Africa brand as cost-effectively as possible, through cooperation and resource-sharing between the RETOSA Secretariat and member states.

6.3 **Strategic Approach**

As identified above (in Ch. 3 Situation Analysis – Key Issues), a significant difference between the Southern Africa regional brand and an individual country brand is the different level of commitment that individual member states feel towards the regional brand compared to their own country brand. It is understandable, particularly where resources are limited, that individual states will tend to focus on their own brand rather than on the regional brand, as each member state is interested, first and foremost, in driving business to its own country.
Therefore, in order to elicit member states’ commitment to the regional brand, and to maximise its impact, a strategic approach is required that addresses the following priorities:

- **Understanding**: Firstly member states need to understand the potential power of the regional brand to enhance their own image and support their own marketing activities.

- **Management and Planning**: Secondly, a formal management and planning structure needs to be established, which integrates the Southern Africa brand into member states’ strategic thinking and ongoing marketing planning.

- **Commitment and Sustainability**: Thirdly, visible leadership is required from the very top, with respected brand champions continually endorsing the role and value of the regional brand, in order to inspire those responsible for implementing the brand to buy into its importance.

- **Evaluation**: Finally, systems need to be put in place to measure the impact and ongoing health of the regional brand. This will determine when the brand needs to be reviewed or refreshed in order to maintain its impact.
6.4 Tactics – Implementation Guidelines

Each stage of the strategic approach outlined above has a different aim. These are set out below, with corresponding tactics for addressing each aim. All stages of these implementation guidelines should be implemented, in order to embed a commitment to the Southern Africa brand throughout member states and to ensure its effective implementation on behalf of all member states and the region as a whole.

6.4.1 Understanding

Aim:
- To embed an understanding of the role and value of the regional Southern Africa brand amongst marketing personnel, as well as leaders and opinion-formers, in member states.

Tactics:
- Undertake an internal marketing campaign and run regular, ongoing capacity-building seminars, coaching and mentoring for destination marketing personnel in member states.
- Hold regular meetings and briefings with leaders and opinion-formers in member states – e.g. include a standing item on the regional brand in all senior-level RETOSA and other regional meetings.
- Establish an “Experience Southern Africa” regional brand section on the RETOSA website. This should include:
  - News items and updates related to the brand, and particularly on its implementation – by RETOSA Secretariat, member states, tourism operators and others.
  - The regional brand toolkit. (See below)
  - A “chat room” resource for member states to exchange experiences and ask questions about implementing the regional brand.
- Develop a brand toolkit. Its purpose is highly practical - to explain clearly what the brand is and how to apply it in marketing communications. It should cover both brand personality guidelines and technical design guidelines. It should:
  - Explain what a destination brand is.
  - Define the role and value of the regional brand.
  - Present the regional brand’s core characteristics, with examples (diversity, wilderness, humanity, climate).
o Explain how it might be implemented in marketing communications (through visual imagery, tone of voice, design style, colours, “dos” and “don’ts” etc., including both “right” and “wrong” examples).

o Include technical specifications for using the regional brand logo.

6.4.2 Management and Planning

Aim:

• To develop a management structure that:
  o Ensures effective implementation of the regional brand on an ongoing basis.
  o Monitors the ongoing health of the brand and recommends when it needs to be reviewed or refreshed.

• To integrate the regional brand into the planning processes of individual member states, in order to achieve maximum distribution and impact for the regional brand.

Tactics:

• Appoint a brand guardian, who is responsible for:
  o Overseeing the implementation of the regional brand and encouraging its usage by appropriate organisations (e.g. member state NTOs and tourism operators).
  o Maintaining the regional brand’s integrity and ensuring it is used correctly by stakeholders.
  o Monitoring the regional brand’s health and impact, and identifying when a review of the brand is required or the brand needs to be refreshed.
  o Acting as the key contact point and source of information on the regional brand.
  o Managing any licensing or technical issues associated with the regional brand.

Given the membership nature of RETOSA and business priorities of individual member states, it is recommended that the RETOSA Secretariat be appointed as the brand guardian for the Southern Africa regional brand.

• Appoint/elect a Regional Brand Steering Group, which is responsible for:
  o Supporting the brand guardian in carrying out this role.
  o Monitoring the brand guardian’s performance and the brand’s impact.
  o Assessing, with input from the brand guardian, when to refresh the brand.
The Steering Group should include a representative from each member state (i.e. 14 people), ideally senior marketing staff from member state NTOs and/or tourism ministries. Ideally, it would be valuable to obtain input from the travel industry, and any other influential marketing-literate person that may be considered appropriate. However, given the need to balance representation and efficacy, it may be best for the steering group to restrict its core membership to member state representatives (from NTOs and/or tourism ministries) and to retain the authority to co-opt other experts as external advisers as and when necessary.

- Establish an annual **regional marketing planning process**. This should be a joint exercise between the RETOSA Secretariat and member states, in which a full schedule of regional marketing activities – in the form of a **regional marketing plan** – is agreed for the coming year. With regard to the regional brand, member states should identify in this regional plan how they propose implementing the regional brand through their own communications and any support they might need from the RETOSA Secretariat.

### 6.4.3 Commitment and Sustainability

**Aim:**
- To maximise take-up of the brand by stakeholders and thereby achieve widespread distribution of the Southern Africa brand messages amongst appropriate audiences.
- To ensure the regional brand is sufficiently widely understood, that a solid commitment to its implementation is embedded in member states, and that appropriate structures and management procedures are in place to ensure the regional brand’s long-term sustainability.

**Tactics:**
- Identify **brand champions** and recruit them to endorse the regional brand and encourage commitment to it amongst people in their own networks. Brand champions are senior people, who are influencers, opinion-formers and leaders and command widespread respect in their own community. Their influence often transcends several sectors (e.g. not just tourism). Their role is to win the hearts and minds of stakeholders in their own community/country and encourage relevant people to buy into the regional brand concept and use it wherever appropriate in their own marketing communications.
N.B. It is generally better to have a few high profile brand champions than many who have less influence. Brand champions need to be given training and support in order to understand the regional brand and how they might inspire others to use it.

- **Identify brand advocates** and train them in the use of the brand. The difference between brand champions and brand advocates is that brand advocates generally do not have the public profile of brand champions and operate at a less senior level than brand champions and work at a managerial/executive level. Brand advocates need to be persuaded to promote the regional brand within their own organisations and encourage the usage of the regional brand at an organisational level.

Brand advocates are usually people who have executive authority within their own organisation for deciding whether or not to include the regional brand in their organisation’s own marketing communications – i.e. marketing directors/managers in NTOs, Ministry of Tourism officials, and executives in tour operating companies. These people are extremely important, as it is they who are responsible for implementation.

As with brand champions, brand advocates need to be given training and support in order to understand the regional brand and how they might use it.

- **Internal marketing** – in the form of ongoing capacity-building seminars, coaching and mentoring for destination marketing personnel in member states, and meetings and briefings with leaders and opinion-formers in member states – is also an important means of maintaining commitment to the regional brand and ensuring its sustainability (See under 6.4.1 Understanding above).

It is important to recognise that the process of branding – particularly at a regional level – is not a single step. It requires constant attention and nurturing in order to maintain understanding of, commitment to, and creative implementation of, the regional brand by member states.

This constant nurturing is particularly important in light of the disparate nature of the region, the number of member states (who are the key communicators of the regional brand), and staff turnover in marketing positions in member states. Therefore an **annual programme of capacity-building** should be developed. Capacity-building in relation to the regional brand can be incorporated within a broader training programme (e.g. marketing and branding capacity development); it need not be delivered separately, as this would be both cost-ineffective and unlikely...
to attract sufficient numbers of appropriate personnel if it was restricted to branding skills alone.

- Appoint a **marketing agency** to focus on external marketing of the region, as outlined in 5.3.3 *Communications Channels > PR/Media Relations* above. The key focus for this agency should be on the more cost-effective methods of marketing communications, particularly PR/media relations, digital marketing and social media.

While the focus should be on the large tourism-producing markets (western Europe and North America), management efficacy would best be served by an agency whose head office was accessible to the RETOSA Secretariat (i.e. South Africa-based), with branch offices or reliable associates in RETOSA’s key target markets.

This agency should be managed on a day-to-day basis by the RETOSA Secretariat, as brand guardian and regional marketing coordinator. (N.B. This will require additional capacity within the RETOSA Secretariat, as RETOSA does not currently have the necessary capacity or resources to undertake this function).

- The **RETOSA website** should form the core platform for all Southern Africa marketing activity. This requires a **webmaster** to manage and maintain the RETOSA website. This role involves constant monitoring of the site, updating, enhancement and expansion, as well as progress-chasing members for their data, and liaison with the marketing agency. (N.B. This will also require additional capacity within the RETOSA Secretariat, as RETOSA does not currently have the necessary capacity or resources to undertake this function).

### 6.4.4 Evaluation

**Aim:**

- To measure **member states’ awareness and application** of the regional brand.
- To measure **potential visitors’ awareness of, and attitudes** towards, Southern Africa.

**Tactics:**

- Measure **awareness of the regional brand in member states** (marketing staff) and the **extent of commitment** to it in terms of its application in member states’ own marketing communications, through
- an annual survey of member states’ awareness levels;
- evidence from member states of their application of the brand in their marketing communications (e.g. websites, brochures, advertising, posters, banners, exhibition stands etc.)

- Undertake a regular **evaluation** of the regional brand’s health and impact amongst potential visitors in key markets. This should inform decisions about reviewing and refreshing the brand. This should be built into the regional marketing plan.

N.B. The cost of comprehensive brand-tracking surveys in major external markets is considered prohibitive; and, in view of marketing budgets and the long-term role of the brand, significant change is unlikely to show at a macro-level year-on-year. Therefore, these less formal, and more affordable, methods of measurement are proposed, which will yield valuable information from a more restricted audience over several years.

Given the long-term role of the brand (and the cost of brand-tracking surveys), it is recommended that this should be undertaken no more frequently than once every three years.

Recommended, cost-effective methods for evaluating the brand’s health and impact in relation to potential visitors include:
- Brand-tracking and attitudinal survey of visitors to the RETOSA website.
- Survey of major tour operators in external markets – awareness of, and attitudes to, the “Experience Southern Africa” brand.
- Feedback from member states on their perceptions of changes in awareness of, and attitudes towards, Southern Africa amongst their markets.
## 6.4.5 Summary of Proposed Tactics and Implementation Guidelines (incl. Costs, Targets & Evaluation) - Brand Management Strategy

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>COST – $USD (Indicative)</th>
<th>TIMESCALE (Approx.)</th>
<th>TARGET</th>
<th>EVALUATION METHOD (&amp; RESPONSIBLE BODY *)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Understanding</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Run ongoing capacity-building seminars, coaching and mentoring for</td>
<td>Costs include:</td>
<td>1-2 x p.a.</td>
<td>- 2 seminars p.a.; - 80% attendance by member states; - X marketing</td>
<td>- Assessment of attendance (RETOSA Secretariat)</td>
</tr>
<tr>
<td>destination marketing personnel in member states</td>
<td>◦ RETOSA Secretariat &amp;</td>
<td></td>
<td>staff trained p.a.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>member states’ time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>◦ Venue hire (if necessary)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>◦ External consultancy (if</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>necessary)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Hold regular meetings and briefings with leaders and opinion-formers</td>
<td>Costs include RETOSA</td>
<td>Year 1 &amp; ongoing;</td>
<td>- Inclusion of regional brand as an agenda item on all RETOSA and other</td>
<td>- Assessment of meeting agendas (RETOSA Secretariat)</td>
</tr>
<tr>
<td>in member states</td>
<td>Secretariat &amp; member</td>
<td>in all senior-level</td>
<td>regional meetings.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>states’ time only</td>
<td>regional meetings</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Establish an “Experience Southern Africa” regional brand section on</td>
<td>See Communications</td>
<td>Year 1 &amp; ongoing</td>
<td>- Establishment of “Experience Southern Africa” regional brand section</td>
<td>- Site established (RETOSA Secretariat);</td>
</tr>
<tr>
<td>the RETOSA website.</td>
<td>Strategy table above (Ch</td>
<td></td>
<td>on the RETOSA website; - Site constantly up-to-date, relevant &amp;</td>
<td>- Monitoring of site’s currency,</td>
</tr>
<tr>
<td></td>
<td>5.4.5) (c. $20-30,000 -</td>
<td></td>
<td>inspiring; - Monthly input to regional brand section by each member</td>
<td>relevance &amp; quality (RETOSA Secretariat);</td>
</tr>
<tr>
<td></td>
<td>year 1 set-up; ongoing</td>
<td></td>
<td>state; - Establishment of member states’ “chat room” on regional site.</td>
<td>- Assessment of monthly input (RETOSA</td>
</tr>
<tr>
<td></td>
<td>costs covered by</td>
<td></td>
<td></td>
<td>Secretariat); - “Chat room” established</td>
</tr>
<tr>
<td></td>
<td>webmaster – see Commitment</td>
<td></td>
<td></td>
<td>(RETOSA Secretariat).</td>
</tr>
<tr>
<td></td>
<td>&amp; Sustainability below)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Develop a brand toolkit – including both brand</td>
<td>Year 1</td>
<td></td>
<td>- Clear, easy-to-use online toolkit developed, with brand communications</td>
<td>- Toolkit produced (RETOSA &amp; member states)</td>
</tr>
<tr>
<td>personality guidelines and technical design guidelines</td>
<td></td>
<td></td>
<td>guidelines &amp; tech specifications for using regional logo.</td>
<td></td>
</tr>
</tbody>
</table>
## Management and Planning

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>COST – $USD (Indicative)</th>
<th>TIMESCALE (Approx.)</th>
<th>TARGET</th>
<th>EVALUATION METHOD (&amp; RESPONSIBLE BODY *)</th>
</tr>
</thead>
<tbody>
<tr>
<td>- <strong>Appoint a brand guardian</strong></td>
<td>Costs include RETOSA Secretariat &amp; member states’ time only</td>
<td>Year 1</td>
<td>- Appoint RETOSA Secretariat as regional brand guardian to:</td>
<td>- Appointment of brand guardian (Steering Group):</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Oversee effective implementation of the regional brand &amp; ensure compliance with brand guidelines by member states &amp; stakeholders;</td>
<td>- Compliance by all users (RETOSA Secretariat)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Encourage usage of the regional brand by appropriate organisations: by all member state NTOs and min. 5 tourism operators p. country;</td>
<td>- Monitoring of brand take-up (RETOSA Secretariat)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Efficient provision of support &amp; helpful information on using the regional brand.</td>
<td>- Feedback on RETOSA’s support – annual assessment (member states)</td>
</tr>
<tr>
<td>- <strong>Appoint/elect a Regional Brand Steering Group</strong></td>
<td>Costs include RETOSA Secretariat &amp; member states’ time only</td>
<td>Year 1 &amp; ongoing</td>
<td>- Steering Group appointed (representing all 14 member states)</td>
<td>- Establishment of Steering Group (SG)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Effective operation of Steering Group by:</td>
<td>- Appraisal of SG performance (SG members &amp; RETOSA Secretariat)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Effective support to brand guardian in carrying out this role;</td>
<td>- Ditto</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Monitoring the brand guardian’s performance</td>
<td>- Ditto</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Monitoring the brand’s impact;</td>
<td>- Brand-tracking survey (see Evaluation below) &amp; feedback from visitors, tour operators and destination stakeholders (RETOSA Secretariat)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Assessing, with input from the brand guardian, when to refresh the brand.</td>
<td></td>
</tr>
<tr>
<td>- <strong>Establish an annual regional marketing planning process.</strong></td>
<td>Costs include RETOSA Secretariat &amp; member states’ time only</td>
<td>Year 1 &amp; ongoing</td>
<td>- Regional planning process established annually</td>
<td>- Planning process agreed by member states</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Regional marketing plan developed annually</td>
<td>- Regional marketing plan agreed by member states</td>
</tr>
<tr>
<td>ACTIVITY</td>
<td>COST – $USD (Indicative)</td>
<td>TIMESCALE (Approx.)</td>
<td>TARGET</td>
<td>EVALUATION METHOD (&amp; RESPONSIBLE BODY *)</td>
</tr>
<tr>
<td>-------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------</td>
<td>---------------------</td>
<td>-------------------------------------------------------------------------------------------------</td>
<td>----------------------------------------</td>
</tr>
<tr>
<td>Commitment and Sustainability</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Identify and recruit brand champions</td>
<td>Costs include:</td>
<td>Year 1 &amp; annually</td>
<td>2-3 brand champions p. member state &amp; annually Sustained active commitment by brand champions</td>
<td>- No of brand champions &amp; advocates recruited &amp; trained (RETOSA)</td>
</tr>
<tr>
<td></td>
<td>◦ RETOSA Secretariat &amp; member states’ time</td>
<td></td>
<td></td>
<td>- Activity level of brand champions &amp; advocates (RETOSA)</td>
</tr>
<tr>
<td></td>
<td>◦ Training: c. $ 5,000 – to cover external trainer only, but excl. venue hire etc.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Identify and train brand advocates</td>
<td>Costs include:</td>
<td></td>
<td>5-10 brand advocates p. member state &amp; annually Sustained active commitment by brand advocates</td>
<td></td>
</tr>
<tr>
<td></td>
<td>◦ RETOSA Secretariat &amp; member states’ time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>◦ Venue hire (if necessary)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>◦ External consultancy (if necessary)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Run ongoing capacity-building seminars, coaching and mentoring for</td>
<td>See under Understanding in this table above</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>destination marketing personnel in member states</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Appoint a marketing agency</td>
<td>See Communications Strategy table above (Ch 5.4.5)</td>
<td>Year 1 and ongoing</td>
<td>See Communications Strategy table above (Ch 5.4.5)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>(c. $65-80,00 p.a.)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Appoint webmaster to manage and maintain the RETOSA website.</td>
<td>◦ c. $10,000-20,000 p.a. ** ◦ Ongoing maintenance costs covered by webmaster</td>
<td>Year 1 and ongoing</td>
<td>Webmaster appointed quickly &amp; ongoing Effective management &amp; maintenance of RETOSA website</td>
<td>Webmaster in place (RETOSA)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- Assessment of webmaster’s performance (RETOSA, w input from member state NTOs)</td>
</tr>
<tr>
<td>ACTIVITY</td>
<td>COST – $USD (Indicative)</td>
<td>TIMESCALE (Approx.)</td>
<td>TARGET</td>
<td>EVALUATION METHOD (&amp; RESPONSIBLE BODY *)</td>
</tr>
<tr>
<td>----------</td>
<td>--------------------------</td>
<td>---------------------</td>
<td>--------</td>
<td>----------------------------------------</td>
</tr>
<tr>
<td>• Evaluate member states’ awareness &amp; application of the regional brand (intra-RETOSA member states)</td>
<td>Costs include RETOSA Secretariat &amp; member states’ time only</td>
<td>Annually</td>
<td>- 100% awareness of regional brand&lt;br&gt;- Widespread evidence of application of the regional brand</td>
<td>- Internal survey amongst member states (RETOSA)&lt;br&gt;- Evidence of application in member states’ marketing collateral (e.g. websites, brochures, advertising &amp; marketing communications) (RETOSA)</td>
</tr>
<tr>
<td>• Evaluate the regional brand’s health and impact (consumer)</td>
<td>Costs include: &lt;br&gt;○ RETOSA Secretariat &amp; member states’ time&lt;br&gt;○ C. $20,000 survey costs (external)</td>
<td>Every 3 years</td>
<td>- Increased awareness of “Experience Southern Africa” regional brand&lt;br&gt;- Positive improvement in attitudes towards Southern Africa</td>
<td>- Brand-tracking survey via RETOSA website (RETOSA)&lt;br&gt;- Survey of major tour operators in external markets (RETOSA)&lt;br&gt;- Feedback from member states (RETOSA, w input from member state NTOs)</td>
</tr>
</tbody>
</table>

**Notes and Assumptions**

* In order to save space and maximise readability of this table, reference to RETOSA in the EVALUATION METHOD (& RESPONSIBLE BODY) column, refers to the RETOSA Secretariat. Where allocation of specific responsibility for measurement to member states is proposed, this is specified.

** Webmaster salary is based on range between lower quartile and median of webmaster salaries in Johannesburg in Oct 2012 per [http://www.payscale.com/research/ZA/Job=Webmaster/Salary#by_City](http://www.payscale.com/research/ZA/Job=Webmaster/Salary#by_City) (salary range = R30,913 - R301,001. Exchange rate used = $US 1 = ZAR 8.2 per OANDA Forex 23/10/12)
6.5 Brand Management Strategy – Critical Success Factors

Managing the Southern Africa brand successfully – and ensuring it is effectively integrated into marketing communications undertaken by and on behalf of RETOSA member states – requires a high level of communication, trust, and cooperation between member states, as well as with the RETOSA Secretariat. No single organisation can manage the regional brand on its own.

Therefore the following is a summary of critical success factors that need to be put in place for the effective implementation and management of the regional brand:

- An **internal marketing** campaign and **ongoing capacity-building** in relation to branding and marketing skills is required for member states, in order to engender an understanding of, and commitment to, the regional brand and to equip member states to implement it with confidence.

- A regional **brand toolkit** needs to be developed. This will provide technical advice on implementing the regional brand. It will also be a valuable resource to underpin the internal marketing campaign and capacity-building for member states; and it will similarly assist in the training of brand champions and brand advocates, as well as function as an aide-memoire for them in their advocacy work.

- The RETOSA Secretariat should be appointed as the regional **brand guardian**, with responsibility for instigating, maintaining, and monitoring all activities related to the regional brand.

- A regional brand **steering group** should be appointed/elected to oversee the brand management process and monitor the performance of the brand guardian.

- A **regional marketing planning process** should be established. The main output of this should be an annual **regional marketing plan**, developed and agreed by all member states.

- The health and impact of the regional brand need to be regularly **evaluated** – no more than once every three years.
• **Brand champions** and **brand advocates** should be recruited to endorse the brand and inspire stakeholders in member states to use the brand in their own marketing communications.

• A **marketing agency** should be appointed to undertake regional brand-focused marketing in selected international markets.

• A **webmaster** is required to develop and manage the RETOSA website, which is the core platform underpinning the implementation of the regional brand.

• In order to undertake all these activities required to manage and implement the brand effectively, this places a significant burden on RETOSA as the brand guardian and regional marketing coordinator. However, RETOSA’s resources – human, financial, and institutional – are currently limited. Therefore additional resources will be required by the **RETOSA Secretariat** at an appropriately skilled level, in order to implement, manage and monitor the regional brand successfully.