Zanzibar Destination Marketing Strategy
Final Report
(November 2010)

prepared by

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1.1 – Project Objective and Process

- The Challenge:

  The Government of Tanzania, Government of Zanzibar and numerous private investors are involved in marketing Zanzibar to the global tourism market. Such marketing reflects their different interests and getting consensus on a consistent and coherent image for the Isles has not been a top priority. The result is an unclear international brand image for Zanzibar.

  In addition, the recent global economic crisis has made it even more important for all tourist destinations to refresh their international image, branding and marketing activities in order to, at the very least, protect their share of international tourist arrivals.

- The Objective:

  To arrive at a shared consensus on the **Destination Marketing Strategy for Zanzibar** as an attractive, safe and distinctive destination.

- Report Structure:

  The report is in three major parts. Part 1 reviews the trends in global and Zanzibar tourism, the policy environment in Zanzibar and makes the case for refreshing and repositioning Zanzibar as a destination. Part 2 is a detailed discussion of a branding strategy and action plan that highlights Zanzibar's unique offering to visitors. Part 3 proposes a marketing strategy and action plan for repositioning Zanzibar in the global tourism marketplace.

The Strategy Development Process

July 2010
Background Research → Strategic Issues

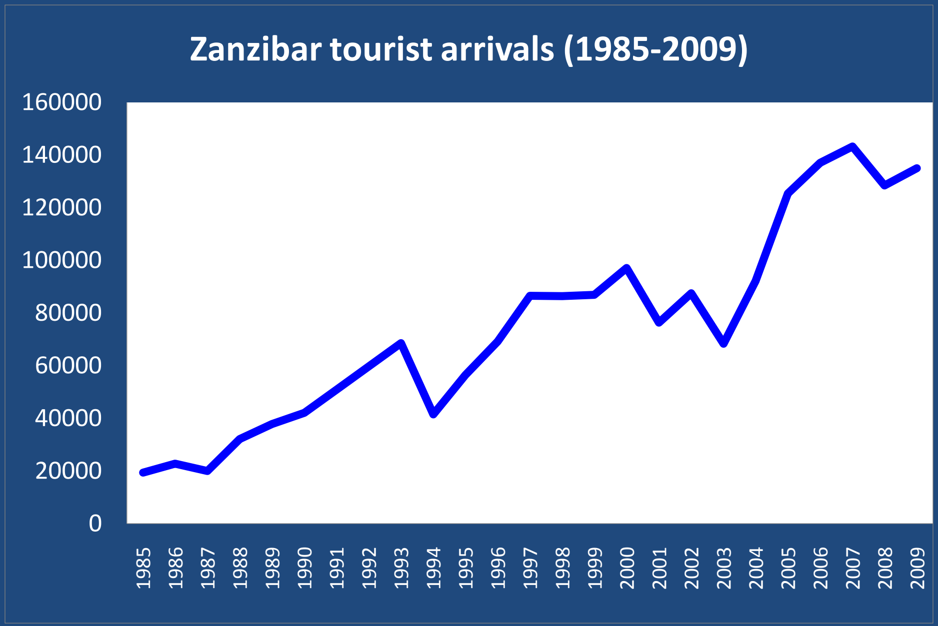
Aug 5
Stakeholder Workshop → Strategic Principles

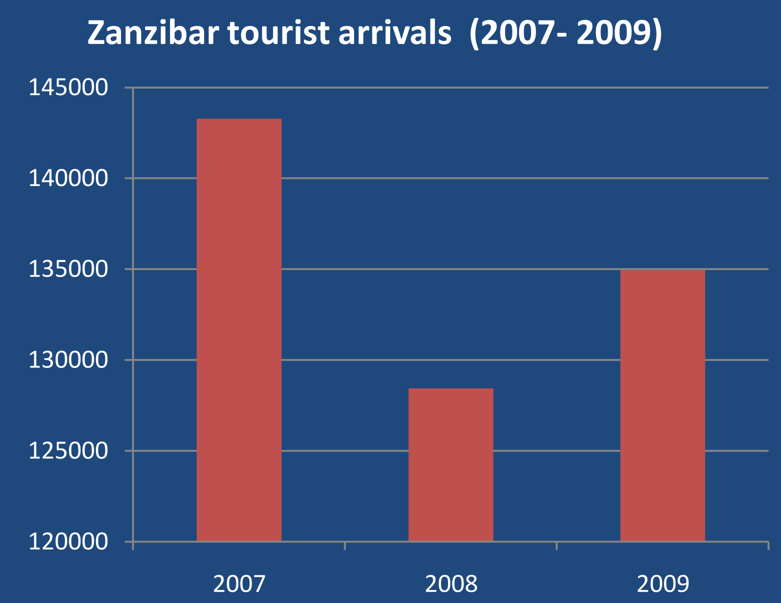
Aug 30
Draft Strategy → Refined strategy + draft action plan

Sep-Oct
Stakeholder consultations → Endorse Strategy & Action Plan

Nov +
Final Strategy & Action Plan → Advocate Adopt Execute

1.2 Trends in Zanzibar Tourist Arrivals (1985-2009)

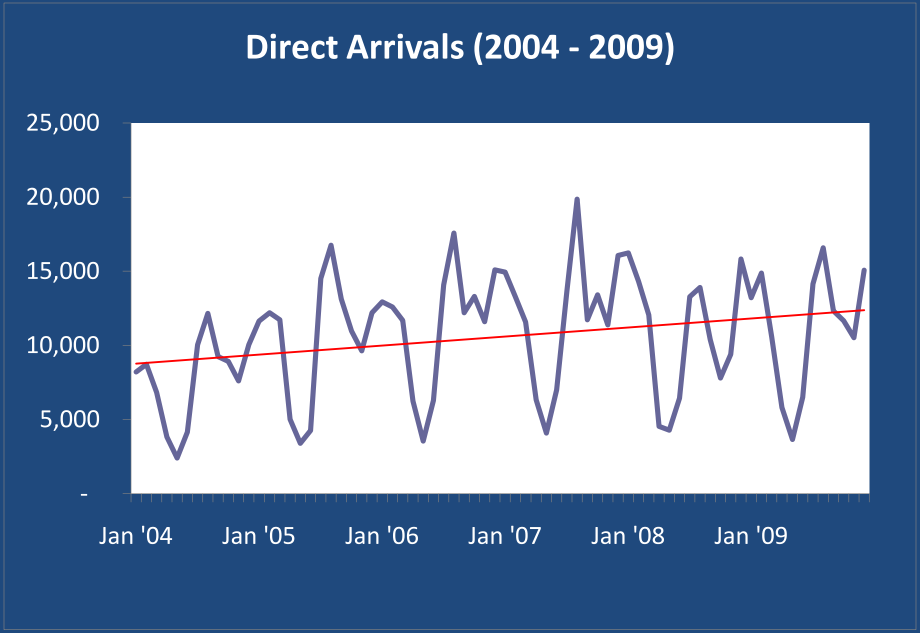


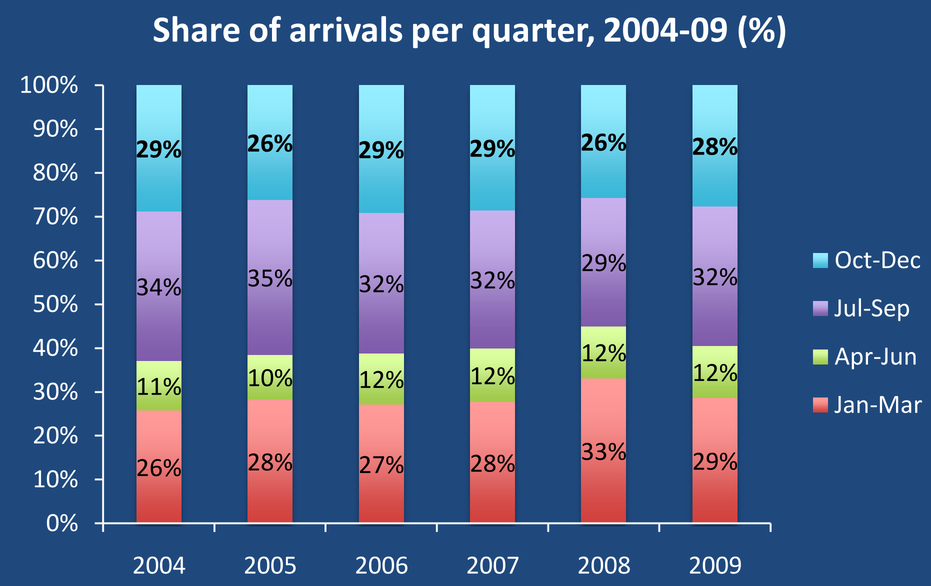


Since the liberalisation of the sector in 1985, there has been a steady growth trend in tourist arrivals despite dips in 1994, 2001 and 2003. The record year in 2007 of almost 145,000 was followed by sharp decline in 2008 and small recovery in 2009. 2010 arrivals in February - May were lower than same period in 2009. But, June 2010 arrivals of over 7,200 were the strongest ever recorded for that month.

As the global economy continues to be sluggish, tourism spending is squeezed and competition intensifies, visitors are looking at other Island destinations which offer different experiences, better service and value for money. Global international tourist arrivals are expected to recover by 3-4% in 2010. **To maintain growth and market share, Zanzibar must market its most attractive and distinctive features to the world.**

Zanzibar's Seasonal Swings (2004-09)

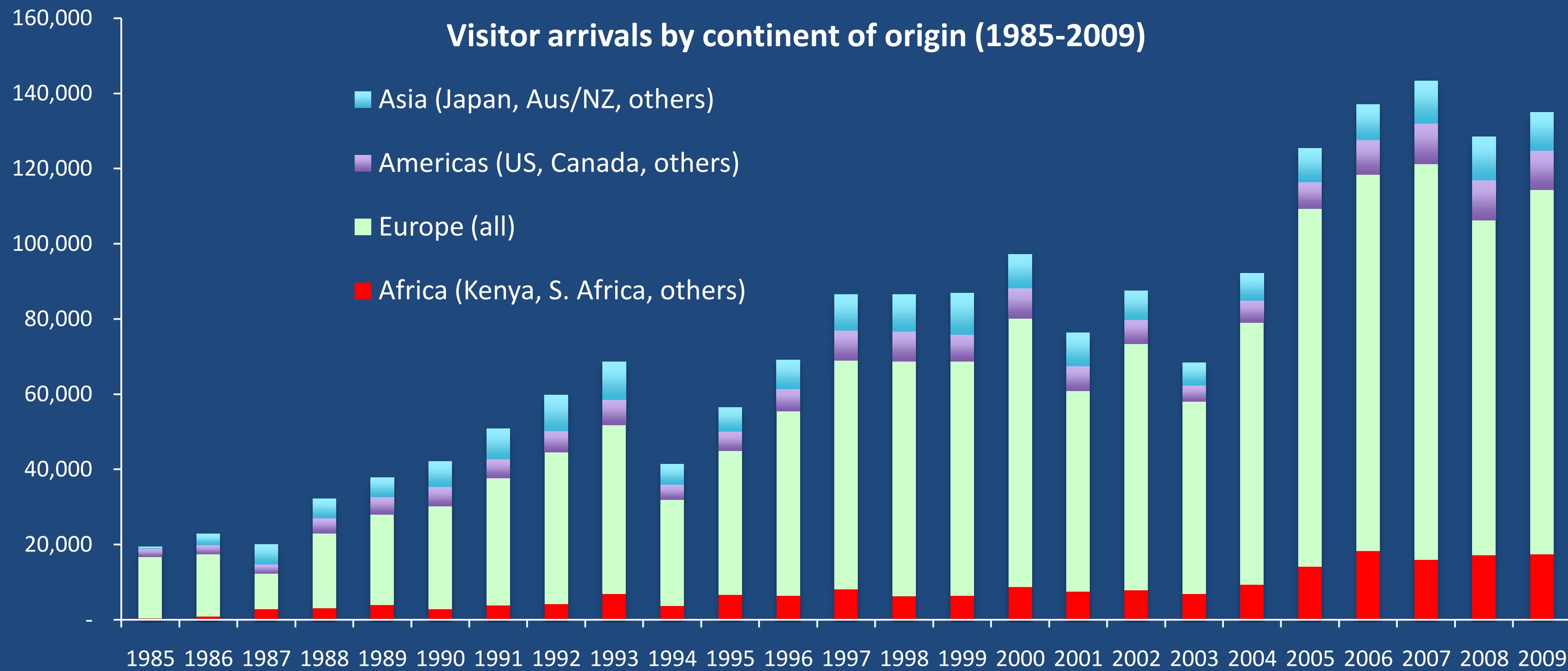




Tourist arrivals exhibit strong seasonal swings when looked at on a monthly basis. This partly reflects a legacy of the early days of Zanzibar's liberalised tourism industry. The original hotel properties were built with semi-permanent materials which needed to be maintained and repaired after the busy December - March season. In addition, arrivals reflected the European travel patterns of over 20 years ago.

It is possible to fill in the April – June dips by targeting regional tourist markets (Kenya, Uganda, Zambia), honeymooners, visitors from the Arabian peninsular who would find a rainy season experience attractive; young independent travelers and the older time-rich travellers. Price discounting and additional activities in Stone Town could complement the focused marketing directed at these new segments.

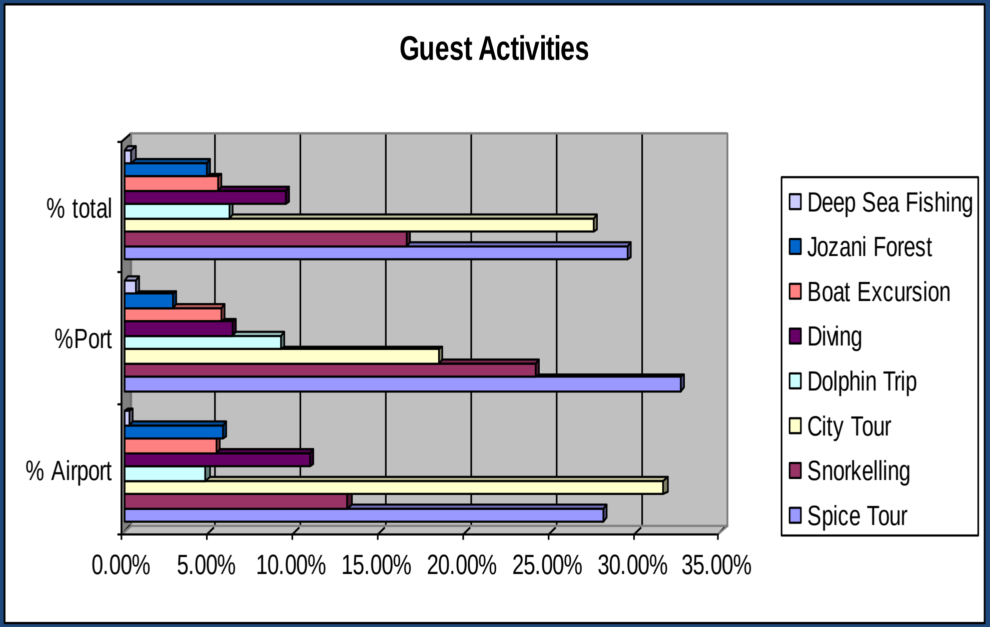
Zanzibar's main source markets



Europe supplies the lion's share of Zanzibar's visitors (over 70%)…

…but Africa is looking increasingly interesting as its share of arrivals has grown from 2% in 1985 to 13% in 2009.

Why visit Zanzibar?



Source: Exit Survey 2009

A 2006 Bank of Tanzania/MNRT detailed visitor exit survey of 505 visitors to Zanzibar found that **92%** came for leisure, **3.4%** for business (MICE), **3%** to visit friends and relatives (VFR), and 1.8% for ‘other’ reasons. The 2009 exit survey found **96%** came to Zanzibar for leisure, **3%** for business and **1%** for VFR.

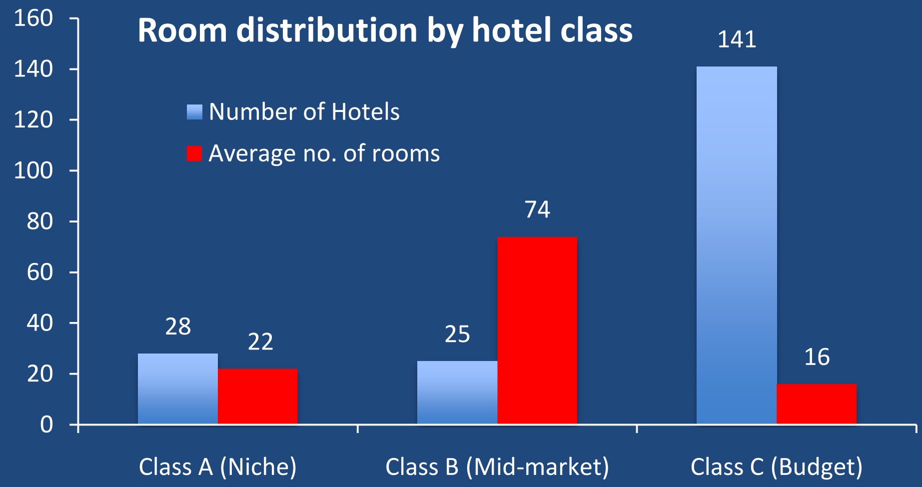
The more recent 2009 visitor exit survey showed that visitors come to Zanzibar for two major reasons (see chart above):

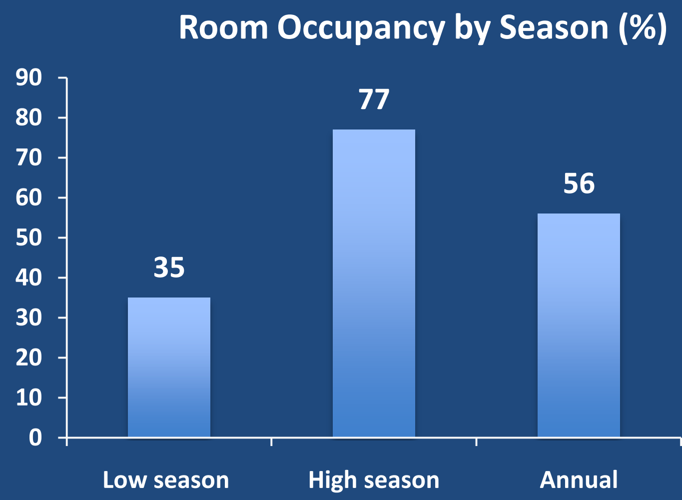
1. **Uniqueness**: City and Spice tours enjoyed by 30% of visitors
2. **‘Sea-safaris’**: snorkeling, diving, dolphin tour, boat trip enjoyed by 5-15% of visitors.

Zanzibar’s unique history, culture architecture and character is a strong asset drawing visitors to the Islands.

Zanzibar's hotel rooms and occupancy levels

(Source: SNV Value chain analysis)





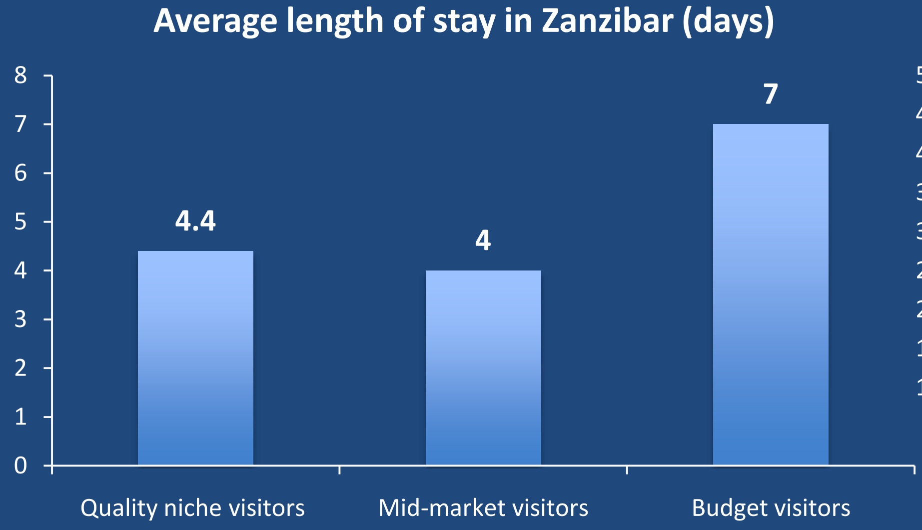
	Class A – Quality Niche	Class B – Middle Market	Class C – Budget
Rooms (#)	8-50	100-300	5-20
Experience	Boutique, exclusive, personalised	All-inclusive, package	Independent, affordable
Ownership & management	Private, hands-on 'foreign'	Hotel chain 'professional'	Private, local 'family'
Pricing per room night ($)	150-400	700 per week, 300 per room	15-100
Share of Zanzibar hotels (%)	15%	12%	70+%

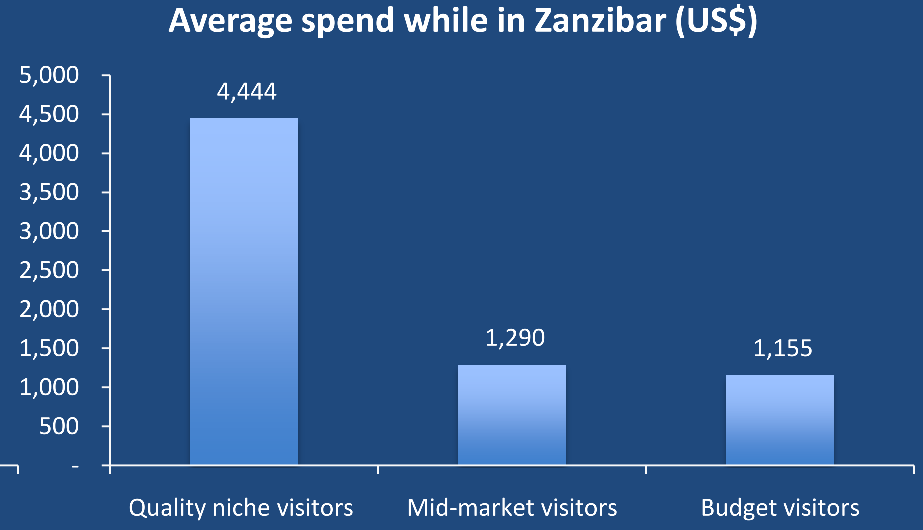
Tourism properties have developed across the entire range from high-end to budget without an overall strategic guidance from authorities.

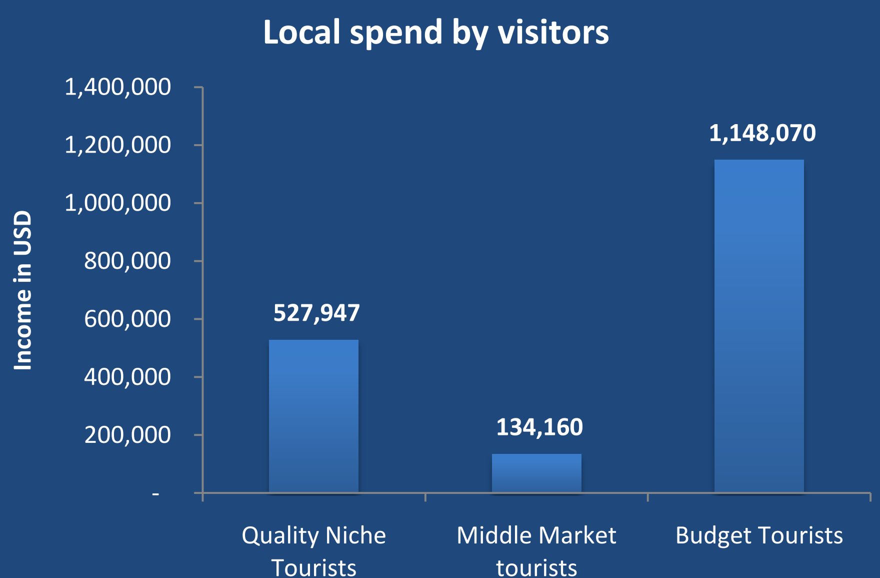
The larger number of budget accommodation units (141 hotels) could be due to their relatively lower investment costs. It may also suggest that investors see growth prospects in this income segment of the visitor market.

Staying *and* Spending in Zanzibar

(Source: SNV Value chain analysis)







Zanzibar offers a diverse product and caters to the full range of visitor income levels. This provides a certain resilience of the sector to shocks in its source markets. In early 2009, the niche and budget ends of the market did not experience as sharp a drop in arrivals compared to the mid-market as a result of the global economic crisis.

Quality niche tourists spend more money individually, but the budget tourists and independent travelers contribute the most income as a group, by arriving in larger numbers and spending more time on the Islands.

The challenge is to brand and market Zanzibar to all groups (niche, mid-market and budget) without confusing the product and experience in either group's mind.

1.3 Zanzibar Tourism Policy Environment

Major tourism sector stakeholders

Official tourism vision, mission and policy

Vision: "Becoming one of the top tourism destinations of the Indian Ocean, offering an up market, high quality products across the board within the coming 17 years" (Zanzibar Tourism Master Plan, 2003)

Mission: "To be the most exotic, diverse island destination in the Indian ocean region."

Policy (General Objective): "To develop, plan, manage and promote a tourism industry that emphasizes sustainability, quality and diversification, and which is culturally responsible, socially desirable, ecologically friendly, environmentally sustainable and economically viable (Zanzibar Tourism Policy)."

Public sector stakeholder mandates

- **Ministry of Natural Resources and Tourism (United Republic of Tanzania)** manages the natural and cultural resources of (primarily mainland) Tanzania. It is also mandated to develop the country's tourism industry.

- **Ministry of Trade, Tourism and Investment (Zanzibar)** oversees the Zanzibar tourism policy. The ministry also manages the Commission for Tourism (ZCT), the main coordinator of the policy. Apart from the tourism portfolio, the ministry deals with trade and investment, all non-union matters.

- **Tanzania Tourist Board (TTB)** is a promotional body charged with marketing and promoting sustainable Tanzania's tourism domestically and internationally (Zanzibar is also included in the organization's promotional mandate). It has information offices in Dar es Salaam, Arusha and New York. It also has a basic website, and represents Tanzania in various promotional tourist fairs.

- **Zanzibar Commission for Tourism (ZCT)**

  Set up in 1996, this non-commercial government entity is the Government of Zanzibar's main coordinator of the tourism policy. In this role, it is responsible for the destination marketing of Zanzibar; tourism sector licensing and regulation; planning and development; and sector's investment guiding. In 2011, ZCT will become the Zanzibar Tourism Board with added operational autonomy.

Observations on the public sector stakeholders

- **Role of the Union Government /Tanzania Tourist Board (TTB)**
  - No statutory relationship between Zanzibar Government and Union Government on Tourism matters
  - Zanzibar was mentioned only six (6) times in the 2009/2010 budget of the union Ministry of Natural Resources and Tourism; only one area of cooperation (data collection) was identified and this took three (3) of the six mentions.
  - In the 2010/2011 Budget, Zanzibar was mentioned only twice – both times in relation to events that took place in the Isles, rather than referring to any strategic engagements between the two ministries.
  - Cooperation agreements exist (Uroa Declaration) and Zanzibar has relied on the TTB to organise most global promotions.
  - But TTB has no office in Zanzibar . It is based in Dar es Salaam and has information Centres in Arusha and New York
- **Zanzibar Commission for Tourism (ZCT)**
  - **Only 40% of requested funds are allocated**. Was previously promised 35% of Zanzibar's internal government revenue collections.
  - Results in human resource, financial and equipment constraints
  - Heavy reliance on print advertising (40%) and tourism fairs (30%)? Just TZS 1.2 million was spent on online advertising in 2002/2003 and the existing website is very basic.

The promise and reality of public spending on tourism

- Promised resources:
  - “While the Promotion of Tourism Act 1996, foresees under Part V Funds of the Commission inter alia ‘such sums equivalent to 35% collected by the Revenue Board or any other collector from levy imposed under the Hotel Levy Act 1995 or any substitute legislation’ (i.e. the 20% VAT) – the Zanzibar Commission for Tourism has received inadequate marketing and promotion funding since the inception of the 1996 Act” (*Tourism Master Plan)*
- Actual resources: For the past two years, only 1% of the national budget was allocated to the Zanzibar Ministry of Trade, Tourism and Investment.

1.4 The case for refreshing & repositioning Zanzibar

- **Global tourism is recovering after a slump in 2008 and 2009**. World Tourism Organization (UNWTO) data shows an increase in international tourism arrivals in the January-June 2010 'up 7% on 2009, but still 2% below that of the record year of 2008.' Compared to the first half of 2008, six sub-regions show growth: **Sub-Saharan Africa (+16%)**, North Africa (+12%), North-East Asia (+7%), South Asia (+7%), South-East Asia (+5%) and South America (+4%). ***Zanzibar's June arrivals were the largest ever recorded for that month.***
- **But the recovery is not on solid ground** because '[in] many advanced economies, namely in the USA and in some major European markets, economic recovery has still to consolidate (UNWTO Secretary-General).'
- In this context, Zanzibar must consolidate and build on its strengths to protect its share of the recovering tourism market by:

a) ***Addressing*** the existing internal constraints and problems which hamper the good performance of the sector *(see next 2 slides)*,

b) ***Refreshing*** its global brand image by highlighting the islands' special character and unique experience offered to visitors *(see Part 2 of this report)*, and

c) ***Repositioning*** itself to deepen its penetration of existing markets (largely Europe with 71% of arrivals), through new product development, and to open up new markets of traveler interest groups by tapping new demographies and geographies *(see Part 3 of this report)*.

The ‘good’ and the ‘bad’ news about Zanzibar tourism – a summary of views

Source	Zanzibar’s strengths	Zanzibar’s weaknesses and areas of concern
Tour Operators (at INDABA, May 2010)	Beaches, diving, reputation, evocative name; villages; history, culture, heritage, “easily a full week of discovery”; exotic, mystical; “something for every budget”	Brand cheapening, shoddy resorts, corrupt traffic cops, sewage smell; airport needs to be faster; dirty beaches & towns, level of service & customer care; pushy touts (papasi);
Investors (ZATI members, June 2010)	History, culture, adventure; Stone Town, sandy beaches; friendly people; “our people”; marine life; relaxed atmosphere	Poor airport service, safety cleanliness; unreliable utilities (power and water supply); multiple taxation; police harassment, unreliable judiciary; shortage of skilled staff; difficulty and expense of obtaining quality, consistent supplies
Visitor exit survey (Aug 2009)	People are very friendly; “They are your national treasures, look after them”	Bad airport experience & facilities; too much hassle from street vendors; Stone Town, beaches and villages are dirty

Selected issues to address

Quick wins (for 2011) (little/no cost to Government)	Longer term issues (for 2012 onwards) (requiring significant public resources)
1. **Airport** – improve passenger handling by increasing visa issuing, departure tax payment and check-in capacity during peak times 2. **Security** – remove roadblocks; provide appropriate 'customer service' training to tourist facing police and traffic officers; expand community police network to reduce beach crime and control more aggressive *papasi* 3. **Waste management** – ban the use of plastic bags in favour of paper bags 4. **Tax collection** – train relevant officers to be more taxpayer-friendly.	1. **Entry points** - redevelop Zanzibar airport and port 2. **Water** - address water shortage issues by investigating rainwater harvesting and the sustainability of underground water sources 3. **Power** - Assess future demand for power and address demand issues; adopt solar power energy were feasible 4. **Skills** - improve primary and secondary education and hospitality training facility 5. **Heritage** - Conserve, protect and improve Stone Town as a heritage destination

Approach: Brand coherence, marketing options

Zanzibar is already a unique place and experience, however its tourism product is currently essentially embedded in the United Republic of Tanzania's brand slogan: ***Tanzania – the land of Kilimanjaro, Zanzibar and Serengeti.*** If there had been a tight integration between Zanzibar and the mainland in terms of destination branding and marketing, an opportunity has now opened up for Zanzibar to assert its uniqueness.

This Destination Marketing Strategy proposes a **brand image that distinguishes Zanzibar from its competitors while projecting a coherent and consistent image to the visitor market**. Furthermore, by recognizing Zanzibar's diverse tourism product, it offers a menu of strategic marketing options to attract new geographical and demographic markets, without explicitly targeting specific income markets.

The strength of the proposed branding and marketing of Zanzibar as vibrant, engaging, a place of escape and mystique, is that it does not force a choice between niche, mid-market or budget products. Indeed, **it allows all of Zanzibar's tourism service providers to tailor the brand's essential elements to suit the specific demographic, geographic and income market segment they are targeting.**

Part 2.
Zanzibar Destination Branding Strategy & Action Plan

2.1 – Destination Branding

What is a destination brand?

- A *destination brand* refers to a destination's **competitive identity**. It is what makes a destination distinctive and memorable.

- A *destination brand* represents the **core essence and enduring characteristics** of a destination. A destination can change its moods and the way in which it presents itself to different market segments. But its core brand characteristics (like someone's personality) are essentially always the same.

- A *destination brand* is a DNA that defines the destination. It should run through **every act of marketing communication and behaviour** by the tourist board and destination's stakeholders.

- A *destination brand* generally cannot be manufactured (some exceptions such as Las Vegas, Dubai) like a consumer brand. It **inherits its core assets**: its landscape, people, culture and history. It therefore has to identify its assets, build on them, and promote them in a way that differentiates it from all other destinations.

Destination Case Study: Australia

- 1983: Australia was number 78 on the "most desired" vacation destination list for Americans.
- 1984: Tourism Australia develop an advertising campaign with actor Paul Hogan (Crocodile Dundee). The actual quote spoken by Hogan in the adverts was: "I'll slip an extra shrimp on the barbie for you", and the slogan of the advert was "Come and say G'day". The campaign pre-dated Hogan's popularity in the 1986 film Crocodile Dundee and therefore were not seen initially as celebrity advertisements as he was unknown in the USA. The campaign oozed Australian values of engaging informality, openness, friendliness and a straightforward no-nonsense approach to life.
- 1985: Australia became number 7 on the "most desired" vacation list for Americans, and soon became number 1 on American's "dream vacation" list. The campaign ran to 1990.
- In 2010, Tourism Australia launched its latest campaign with the tagline: *There's nothing like Australia.* For this campaign, Australians were invited to share their personal stories of where they live and holiday in Australia, to show the world why they should visit.
- Australia's current brand is:
  - ***Emotional Benefits****: On holiday in Australia you don't switch off you switch on. The unique experiences you have and the people you meet will make you feel uplifted and full of life.*
  - ***Brand Personality****: High spirited, down to earth, irreverent, welcoming.*
  - ***Positioning Statement****: The people of Australia are friendly and straight talking and open. Their sense of mateship and their no worries attitude make all visitors feel welcome. They make it easy to enjoy adventures beyond imagination. Whether it's in Australia's wide-open landscapes, pristine oceans or vibrant cities a holiday in Australia is an opportunity to experience a vast yet accessible adventure playground. You don't just visit Australia, you live it.*

2.2 - Branding Zanzibar

"Zanzibar"

The list below shows some of the words and phrases used to describe Zanzibar. They are drawn from guide books, press articles, and web sites. Underlined words are fairly unique to Zanzibar.

<u>Magical far-off place</u>	***The diamond of East Africa***
<u>Place of wonder</u>	***<u>Mysterious</u>***
<u>Exotic</u>	***Paradise island***
<u>Culturally rich</u>	***The ultimate Indian Ocean destination***
Land of exotic spices	***Spectacular sea***
Romantic island	***Best-kept secret in the Indian Ocean***
Paradise of Africa	***Beautiful***
Historic	***The jewel in East Africa's crown***

“Zanzibar”

Zanzibar is one of those magical African names, like Timbuktu, Casablanca and Kilimanjaro. For many travellers, the name itself is often reason enough to come.

Bradt Guide: Zanzibar

Zanzibar is one of those names that possess a peculiar, singing magic in every syllable; like Samarkand or Rajasthan, or Kilimanjaro.

Death in Zanzibar, M.M. Kaye

Note the common theme: “magical”, a place of intrigue and mystique.
The word “Zanzibar” itself has considerable positive connotations as a destination.

Zanzibar's DNA *(our assets)*

A destination brand is the DNA that defines the destination. It should run through every act of marketing communication and behaviour by the tourist board and the destination's stakeholders.

Place *(scenery, history, architecture, etc)*	**Produce** *("own" products)*	**People** *(culture, famous, infamous, etc)*
White sandy beaches Clear turquoise waters Small isolated islands Coral reefs Sand banks Dhows/Jahazi boats Stone Town Arabic architecture Palaces and grand houses Narrow streets Forodhani Gardens Jozani Forest Ngezi Forest Villages and markets Vumawimbi Beach Tropical climate/warm water	Spices Wood carvings (chests) Basket weaving Kangas Fresh fish and seafood Taarab	Friendly, smiley people Swahili culture Freddie Mercury (singer) Bi Kidude (singer) Tipu Tip (slave trader) Sultans of Zanzibar (royalty) Princess Salme (royalty) Sinbad the Sailor Captain Kidd (pirate) 1001 Arabian Nights Festival of Dhow Countries Sauti za Busara (music) Pemba bullfighting

Key Market Segments

Key market segments drive the development of the brand. Brand positioning and brand values should be those that most appeal to Zanzibar's key market segments. The way in which we market Zanzibar to each different target audience will vary according to what they find most appealing about the Islands. However, Zanzibar's core brand values should always shine through all marketing activities to all segments.

Segment	Description
Culture and history *Dip into Culture/History* *Visit the Night Food Markets* *Spice Up Your Senses* *Festivals of Music and Film*	**These travellers are interested in the unique historical, architectural, and cultural aspects of Zanzibar**. In particular their focus is Stone Town, although they may also be interested in ruins outside of the town, and life in the villages. Most of these travellers will also visit the beach, but culture and history was the key motivator for selecting Zanzibar.
Sun, sea and sand *Unwind on the beach* *Explore Offshore*	**The main motivation for these travellers is relaxation on or near a beach**. They may participate in other activities such as snorkeling, sailing or fishing, as well as day excursions into the interior. But these are merely "add ons". They are not key motivators for the trip.

Other Market Segments

The secondary market segments cannot be ignored, although they are niche, and by themselves account for a relatively small proportion of the market.

Segment	Description
Scuba diving *Discover Underwater*	The main motivation for these travellers is to dive. Keen scuba divers continually seek new destinations and like to "tick off" sites they have been to. Whilst subjective, Top 100 Dive Site lists tend to show Mnemba in the Top 40 (Scuba Travel #31, Divester #40).
Nature/Sea life *Walk in the Bush* *Close Up Sea Mammals*	Nature travellers visit for specific types of plant or animal life, usually species that are unique the destination. Whilst Zanzibar has some unique or highly interesting species (such as Kirk's red colobus, Ader's duiker, various turtles, dolphins, and some whales) it does not have a strong nature product.

Sun, sea and sand, and *culture & history* are our key market segments. The next step is to identify which assets appeal to these visitor segments. These are Zanzibar's strongest assets.

Destination Audit: *Culture and History*

The destination audit prioritises the assets of Zanzibar in terms of how they appeal to the history and culture market segment. The table shows, in order of priority, which assets are the strongest and most appealing for visitors.

The *strength* is a rating (on a scale of 1 to 5, where 5 is the strongest) that indicates how powerful each asset is compared to other destinations.

Asset	Strength
Stone Town (architecture, buildings, streets)	5
Spices and Zanzibari food	5
Festivals	4
Ruins outside of Stone Town	3
Villages and markets	3
Wood carvings/basket weaving/crafts	3
Music: Taarab/Mercury/Bi Kidude	5
Friendly, Smiley People, Swahili culture	5

SWOT: *Culture and History*

The SWOT provides a summary of Zanzibar's competitive context for history and culture. Only those strengths and opportunities that give Zanzibar a competitive edge, and those weaknesses and threats that truly affect Zanzibar's competitiveness are included.

Strengths	**Weaknesses**
• Stone Town: UNESCO heritage site • Unique and exciting history • Outstanding architecture • Living Swahili culture • Spices	• Rubbish around Stone Town • Derelict or part-derelict in areas • No signposting • Persistent touts in streets
Opportunities	**Threats**
• Tell the story of Zanzibar as a live show • More things to do: e.g. ghost tours, treasure hunts • Rehabilitation of buildings • Signposting • City clean up •Removal of aggressive touts	• Further deterioration of buildings/streets • Decline in safety and security

Destination Audit: Sun, Sea and Sand

The destination audit prioritises the assets of Zanzibar in terms of how they appeal to the sun, sea and sand market segment. The table shows, in order of priority, which assets are the strongest and most appealing for visitors.

The *strength* is a rating (on a scale of 1 to 5, where 5 is the strongest) that indicates how powerful each asset is compared to other destinations.

Asset	Strength
White sandy beaches	5
Clear turquoise waters	4
Tropical climate/warm waters	4
Coral reefs	4
Sand banks	4
Small isolated islands	3
Dhows/Jahazi boats	4

SWOT: Sun, Sea and Sand

The SWOT provides a summary of Zanzibar's competitive context for sun, sea and sand. Only those strengths and opportunities that give Zanzibar a competitive edge, and those weaknesses and threats that truly affect Zanzibar's competitiveness are included.

Strengths	**Weaknesses**
• Extensive white sandy beaches • Warm turquoise sea • Variety of accommodation – accessible to different market segments (budgets)	• Some areas of beach/water pollution • Monsoon season • Hassle from unlicensed beach vendors • Rich-poor divide often apparent where fishing villages are near to hotels • Litter in fishing villages
Opportunities	**Threats**
• Clean up beaches/sea – Blue Flag accreditation • Deal with unlicensed traders • Clean up villages • Smooth out seasonality by attracting visitors from the Arabian Peninsular during the monsoon	• Overdevelopment and inappropriate development of coastline • Inadequate safety and security • Neighbouring Indian Ocean island destinations: Seychelles, Mauritius, Maldives • Other similar destinations such as the Caribbean and Pacific Islands

Competitor Analysis

The destinations have are most likely to compete for tourists looking for a similar product and experience to that offered by Zanzibar are:

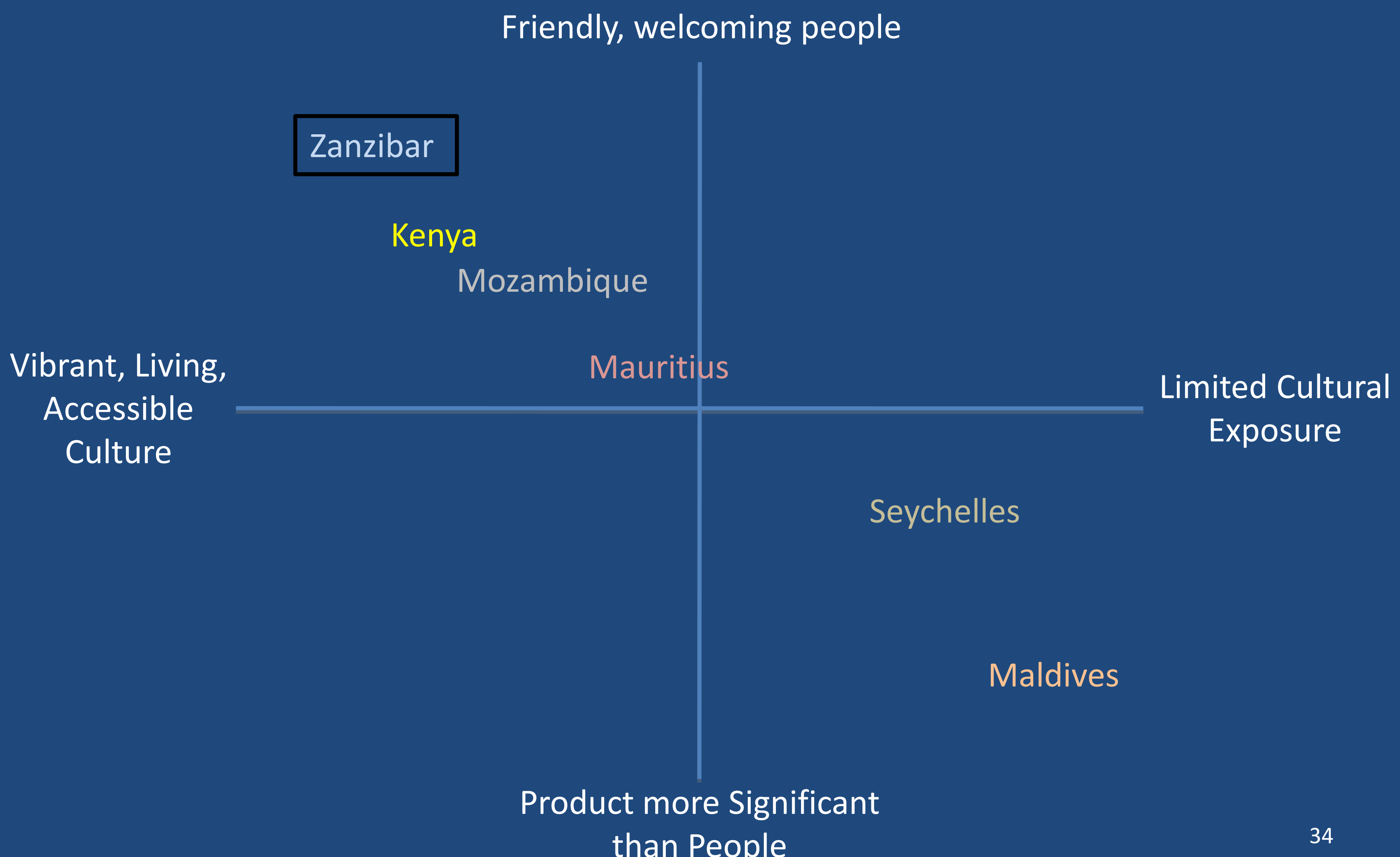
- Kenya
- Mozambique
- Seychelles
- Mauritius
- Maldives

The brand personality of Zanzibar is what distinguishes it from these other destinations. Understanding where Zanzibar stands in relation to its competitors is critical. This means assessing what Zanzibar's competitive strengths and weaknesses are against what visitors are looking for.

The charts (overleaf) show the combination of a tranquil and romantic destination with appeal for different budgets is the competitive advantage for the sun, sea and sand market segment. The combination of a vibrant, living, accessible culture and friendly welcoming people is the competitive advantage for the history and culture market segment.

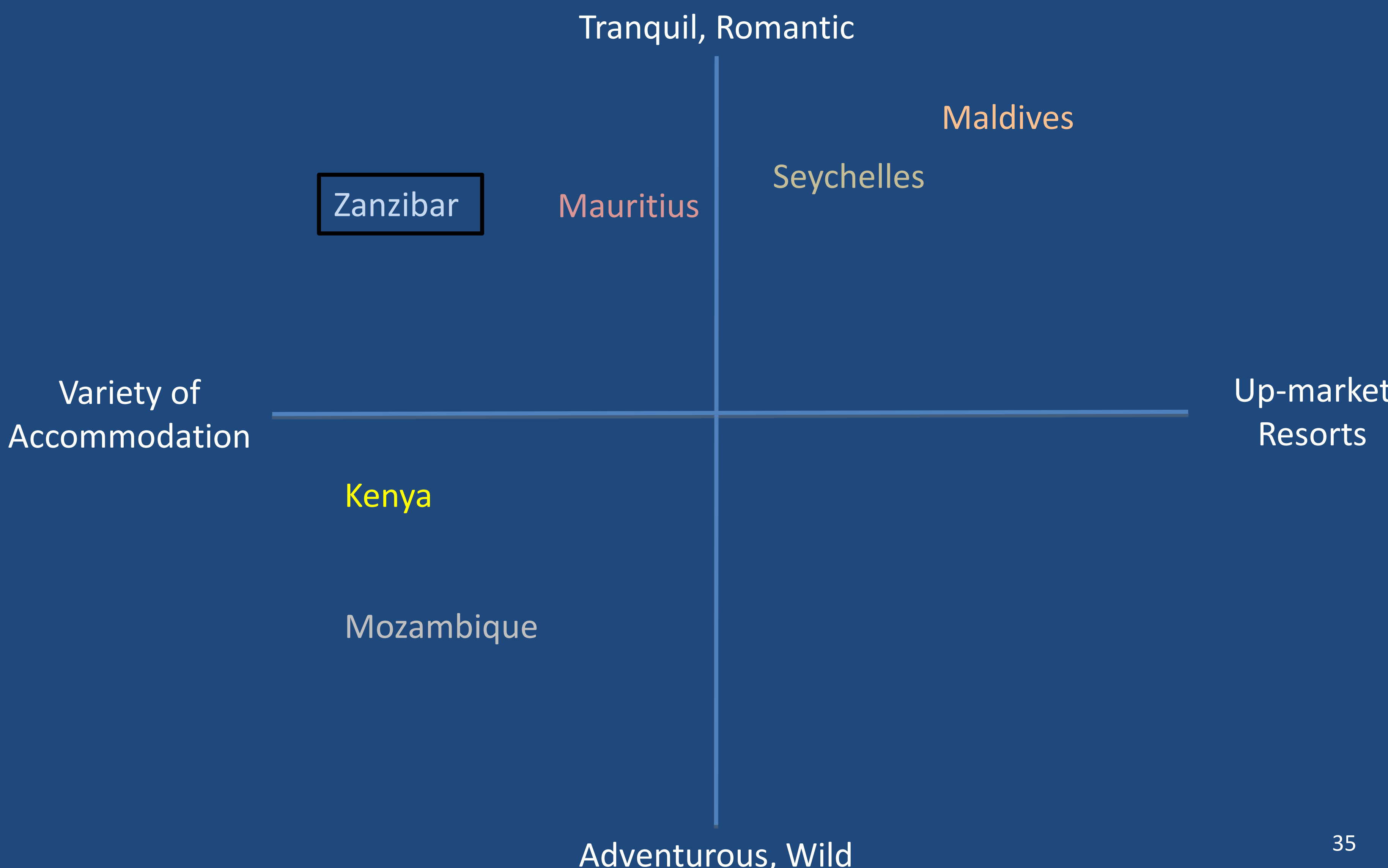
Competitor Analysis

Culture and History



Competitor Analysis

Sun, Sea and Sand



The Brand Pyramid

The brand pyramid is a simple tool that builds up a brand logically from an assessment of the destination's main strengths to a distillation of its essence.

The following pages detail the key elements of a fresh new brand for Zanzibar.

Brand Essence: what is the essential nature and character of the destination?

Positioning Statement: what makes it stand out from everywhere else?

Brand Personality: how would Zanzibar like to be seen and described by its main audience?

Emotional Benefits: how do visitors feel about Zanzibar?

Rational Attributes: what do visitors like to see and do?

Zanzibar's *Rational Attributes*

What do visitors like to see and do?

This first stage of the brand pyramid identifies rational attributes, which are the country's main tourism assets – the things people like to see and do in Zanzibar. These are identified in the earlier SWOT.

- ✓ ***Relaxing on extensive white sandy beaches.***
- ✓ ***Swimming in warm and safe turquoise sea.***
- ✓ ***Choosing from a variety of accommodation for different budgets and tastes.***
- ✓ ***Visiting Stone Town with its unique history, architecture and living Swahili culture.***
- ✓ ***Enjoying the fresh island food from the sea and land.***

Zanzibar's *Emotional* *Benefits*

How do visitors feel about Zanzibar?

The next stage is to build the brand up by exploring visitors' *emotional take-out* – the emotional impact it has on them. This was established through qualitative consumer research (talking to visitors directly) and exploring their perceptions of the destination and their motivation for travel at a relatively deep psychological level.

✓***Amazed by the diversity of the Islands: the beautiful coast, the exotic food, and the rich culture.***

✓***Enriched by the history and culture of the Islands.***

✓***Privileged to be amongst people who live peacefully together and are welcoming and friendly.***

✓***A surprising sense of belonging to the Islands.***

✓***A feeling of being at ease.***

Zanzibar's *Brand Personality*

How would Zanzibar like to be seen and described by its main audience?

The destination's brand personality is established following a competitor analysis, to identify what is truly unique about Zanzibar. This represents a succinct summation of Zanzibar's defining characteristics and reflects how it would like to be seen by its key audience.

✓ ***Beautiful, romantic and exotic tropical islands, full of mystique. They are alive, vibrant, steeped in history and tradition, with friendly, welcoming people.***

Zanzibar's *Positioning Statement*

What makes Zanzibar stand out from everywhere else?

The positioning statement is a summary of the destination's strongest competitive features. This functions as the basis that should guide all marketing activity – whether by the tourist board, marketing agencies, or stakeholders. This should summarise Zanzibar's strongest appeals, which give it ***competitive stand-out***.

Note: the positioning statement is a *back office* tool. It is not a statement that should ever be used in talking to consumers. It is a technical statement that may not be sufficiently inspiring to motivate potential visitors; but it should contain all the key elements describing the destination's competitive position that the tourist board and its marketing agencies require to develop powerful marketing communications.

✓***A legendary name but a real place, where white beaches and turquoise seas frame Islands rich in a vibrant, welcoming culture and living history.***

Zanzibar's *Brand Essence*

What is the essential nature and characteristics of Zanzibar?

Finally, the brand essence includes three or four core values that are enduring and which, in combination, comprise the core essence of the destination. These are generally single word descriptors and should be as visual as possible. They should be reflected in all destination marketing communications, particularly in the tone of voice and visual imagery used.

✓*The Place =* ***Vibrant***

✓*The Visitor Benefit =* ***Escape***

✓*The Relationship between Zanzibar and its Visitors =* ***Engaging***

✓*The Intangible Feel =* ***Mystique***

The Zanzibar Brand Pyramid

Brand Essence: **Vibrant**=the place; **Escape**=the visitor benefit; **Engaging**=the relationship with visitors; **Mystique**=the intangible feel.

Positioning Statement: A legendary name but a real place, where white beaches and turquoise seas frame Islands rich in a vibrant, welcoming culture and living history.

Brand Personality: Beautiful, romantic and exotic tropical islands, full of mystique. They are alive, vibrant, steeped in history and tradition, with friendly, welcoming people.

Emotional Benefits: Amazed by the diversity of the Island: the beautiful coast, the exotic food, and the rich culture. Enriched by the history and culture of the Islands. Privileged to be amongst people who live peacefully together and are welcoming and friendly. A surprising sense of belonging to the Islands. A feeling of being at ease.

Rational Attributes: Relaxing on extensive white sandy beaches. Swimming in warm and safe turquoise sea. Choose from a variety of accommodation for different budgets and tastes. Visit Stone Town with its unique history, architecture and living Swahili culture. Enjoy the fresh island food from the sea and land.

Living the Brand

The visitor's experience must live up to the brand's marketing promise.

• The brand should never be a promise of something that might exist in the future or something that is wished for.

• Nothing destroys a brand image as quickly as a bad experience.

The challenge therefore, is for Zanzibar to identify those areas in which the customer experience of the brand is likely to be least satisfactory and attempt to remedy them.

Any disconnect between the brand promise and the visitor's experience in Zanzibar will erode confidence in the brand.

For example, Zanzibar purports to be friendly and welcoming, and will start off on the wrong foot if immigration officials at the airport are surly and uncommunicative. And if visitors are unable to find information easily on what to do on this "culturally vibrant" island, they may be unconvinced by such claims.

Living the Brand *(cont'd)*

Every contact with the destination counts for the visitor. Critical *customer touchpoints* or *moments of truth* can be identified by plotting the customer journey from the visitor's arrival to departure for each main market segment.

• The key points at which the visitor interacts with Zanzibar will have the potential to delight or dismay them. These *customer touchpoints* or *moments of truth* include airport arrival (immigration officers, signage), transfers to hotels, accommodation, guides, shops, restaurants, etc).

• Those responsible for the service delivery at these key points will include commercial service providers as well as government departments that are responsible for public infrastructure provision, such as roads, transport, utilities, immigration, signage, planning, licensing, health and safety, etc.

Once these key points have been identified (for all core segments) they should be assessed and, where appropriate, customer service training programmes, quality assurance schemes, and/or brand seminars should be implemented.

2.3 National and Sub-National Brands

The general rules for national and sub-national brands are as follows:

• All parts of a country should appear linked in some way. They should visibly share the same DNA.

• This is achieved by reflecting some of the national brand values in sub-national brands.

• These national values can be selected or *dialed up or down* by sub-national brands, according to their resonance amongst individual market segments.

• But sub-national brands must also be distinctive. They should have the flexibility to differentiate themselves from each other.

• Like children in a family, sub-national brands should all be quite distinctive, but should bear some resemblance to the parent national brand.

National and Sub-National Brands (cont'd)

The recent political developments in Zanzibar notwithstanding, ideally, both Tanzania and Zanzibar should have the same *brand architecture* so that to the markets they are interacting with, they have a degree of association rather than being seen as two entirely independent destinations. This way, Tanzania can benefit from Zanzibar, and Zanzibar can benefit from Tanzania.

For example, we want to avoid a tourist who is looking for a safari and beach holiday from choosing Tanzania and the Seychelles (or even Kenya and the Seychelles)!

A single country offering both products is a competitive advantage, as the visitor does not have to pass through immigration twice, use two different types of currency, or potentially incur visa charges twice.

Tanzania mainland is the main feeder country for Zanzibar tourism, and Zanzibar provides a complimentary product that is sought by many wildlife-nature tourists on the mainland. Consequently the compatibility of the destinations should be harnessed. If Tanzania doesn't do this it will loose out to other countries that do: such as Kenya, Uganda + Seychelles, etc.

2.4 Branding Action Plan

With a clear brand for Zanzibar now defined, the creative process of the designers, producers and printers should begin. Their job is to bring the words to life into a series of marketing materials.

The following sets out the next steps:

- Design of a logo
- Technical design guidelines

Design of a Logo

A logo is a symbol that, through consistent usage over time, achieves recognition for the destination. It is a symbol, or visual shorthand, that represents the destination. It is unlikely to be capable of succinctly summarising all of a destination's brand values without being cluttered and cumbersome. However, if it is attractive, instantly recognisable as emanating from that destination, and can achieve impact in the way Spain's *el sol de Miro* logo has done, it will be very powerful.

A logo should be:

- Attractive.
- Clear, with clean lines, for impact and distinctness.
- Capable of rendition in colour and black and white.
- Legible in both small and large sizes.
- Suitable for all media on which the tourist board wishes to use it.
- Consistently applied in all marketing communications.

Design of a Logo: use of a slogan

The addition of a slogan that succinctly summarises the brand position is the ultimate aim of logo design. But, like the definitive logo, this is a highly elusive goal. It is difficult to come up with a slogan for a destination that clearly epitomises its brand position in a way that is striking and capable of enduring for many years. Unless they can truly summarise a destination's character, slogans risk being meaningless marketing clichés (e.g. The World's Best Kept Secret).

Consequently, slogans, where they can genuinely add something, might best be tailored to individual market segments (e.g. Country X – the World's Adventure Playground for the adventure market, and for an older more cultural market: Country X – Cultural Crossroads of the Region).

Key points to remember when developing a slogan:

• Slogans are seldom forever, because few can truly and succinctly summarise a destination's personality.

• If it is difficult to come up with a slogan that projects the destination's brand positioning, rather than a meaningless marketing slogan it is better to use a descriptive slogan (e.g. Peru – Land of the Incas).

• Slogans are optional, not essential. If it doesn't add anything to the logo, then its value should be questioned.

• Different slogans can be used for different campaigns to different segments and in different countries, without destroying any brand values.

• Remember: the logo (and the brand essence), not the slogan, is the important constant that aids recognition.

Design of a Logo: use of a slogan

Some examples of slogans that were brainstormed during the Stakeholders Workshop. They are documented here as a record. However all, with potentially the exception of "It's Real", are flawed in some way:

- It's Real
- Escape to the Isles of Zenj
- Islands of Wonder
- Africa Exotic
- The Edge of Africa
- Aqua Days, Arabian Nights…
- The Life of Spice

The Tanzania slogan: The Land of Kilimanjaro, Zanzibar and The Serengeti, whilst being descriptively correct, risks alienating some parts of the country (and stakeholders); for example where does the Ngorongoro Crater fit into this?

TANZANIA

The Land of Kilimanjaro, Zanzibar and The Serengeti

Technical Design Guidelines

Technical design guidelines are required so that any organisation that wishes to use the logo, font, visual imagery, colour palette, etc, in marketing materials can so do in the correct way, to maintain the brand personality.

Technical design guidelines should include the following:

• Font style/typeface: it is necessary to decide on a particular font for titles/headings and use it consistently across all printed and electronic platforms (e.g. brochures, posters, websites, etc). However the body text should always be clean and not elaborate or stylised so that people can read it clearly.

• Colour palette: identify colours and textures that best reflect the destination brand. Include technical specifications for colours to be used in marketing materials.

• Photography and visual imagery: define any technical specifications (e.g. image resolution). Include an online photo library contact for people to obtain brand-compliant pictures if possible.

• Logo: technical design specifications are required that include: colour specifications, size/dimensions, position, appropriate and inappropriate background (e.g. on light, not dark background), use in large and small sizes, electronic and printed usage, use in different media, use in black and white and colour.

Part 3

Zanzibar Marketing Strategy and Action Plan

3.1 Strategic marketing options for Zanzibar

	EXISTING TOURISM PRODUCTS	NEW TOURISM PRODUCTS
EXISTING MARKET	A) Preservation	B) Extension
NEW MARKET	C) Penetration	D) Diversification

1. Moving from A to B is a process of making sure the existing visitors extend and enrich their Zanzibar visit by being offered and trying out new products, activities and experiences. An example would be regular package tour visitors who previously never left the beach resort, trying a new cultural experience, such as Zanzibar cooking lessons in Stone Town.
2. Going from A to C is a process of penetrating new markets by offering Zanzibar's existing tourist products and experiences to visitors who have not been here before. An example would include new visitors from China, Russia or Nigeria who have never been to Zanzibar.
3. Going from A to D means offering new products/experiences to new markets at the same time. It tends to be a risky move, since both the product and the market are 'unfamiliar'. Example might be establishing 'snowbird' estates of long-stay condominiums for senior citizens (a new service for new types of visitors).

A) Preservation of existing products and markets

- Current demographies
  - Package tour visitors, independent families, students, independent travellers (all ages), honeymooners.
- Current geographies
  - Europe (all), Americas (US, Canada), Africa (S Africa, EAC), Asia (Japan, Australia, New Zealand)
- Existing activities and experiences
  - Zanzibar history and culture (Stone Town, Spice Tours, visits to palace ruins)
  - The typical sun, sea and sand experience
  - Adventure tourism (diving, snorkelling, dolphin/whale safaris)

B) Extension into new products & activities

- New activities and experiences
  - Zanzibar culture (films, music, culinary festivals), living/animated history shows and interpretation
  - Adventure tourism (kite-boarding, quad-biking, skydiving)
  - Health enhancing tourism (yoga, spas)
  - Meetings, incentives, conferences & exhibitions
  - Rainy season tourism (Middle East & Gulf visitors)
  - Winter/2^{nd} home condominium and timeshare residents
  - Yachting and marina tourism

C) Penetration of new target markets

- New Demographies
  - ***Global senior citizen*** - older, but active/healthier visitors who have lots of time, travel more frequently and during the off-peak seasons. They are curious travelers who seek culture and learning opportunities and soft, socializing opportunities. ***Zanzibar should be aware of their age-specific needs and tourism experiences that emphasize 'ease of use' will be more attractive to this market.***
  - ***Single, sophisticated, savvy traveller*** - looking for opportunities to socialize and experience a combination of education and entertainment (edutainment) in a safe and reassuring environment. ***Zanzibar must offer them a "back to nature" element and provide services for solo travelers at attractive pricing levels.***
  - ***Diversified family group*** - There is high interaction between members of different ages, needs are fragmented within the same group and all family members tend to be involved in deciding on the destination and activities while there. ***Zanzibar need to promote a holiday experience suitable for several generations travelling together, tailor accommodation and transport services to the needs of large heterogeneous groups and price to appeal to multi-generation parties.***
  - ***Diaspora from Zanzibar and East Africa's coast*** – This market segment has a strong motivation to visit friends and relatives and reconnect with the culture and values in the country of origin. ***Zanzibar can use its diaspora networks and communities abroad to promote the destination.***
- New Geographies
  - Middle East and Gulf States, Emerging Asia (especially India and China), Africa (Southern, Western – Nigeria & Ghana), Northern Europe, (Scandinavian countries), Russia, Brazil.

3.2 Marketing Action Plan

- The Action plan should fit the demographies, geographies, and activity segments that have been identified before.
- A more detailed understanding of visitor profiles is ideally required, and the UNDP-funded statistics project should assist with this.
- Having developed the fresh new brand for Zanzibar, the three steps in the marketing action plan are:

  Step 1. Design and production of marketing materials

  Step 2. Developing an online presence

  Step 3. Targeting the markets

Step 1: Design and Production of Marketing Materials

The following marketing materials are proposed to launch the new Zanzibar brand:

Tourism Directory: full colour A4, 76 pages, with a print run of 8,000 copies and complimentary circulation. It will be circulated to embassies and trade desks worldwide, plus all the major travel fairs (WTM, ITB, Indaba, FITUR) and other trade shows participated by the Commission of Tourism. Regionally it will be circulated to KATO (Kenya Association of Tour Operators) and AUTO (Association of Uganda Tours Operators) and nationally the directory will be distributed free of charge to all members of TCT, also to tour and travel companies, airlines, hotels, restaurants, diplomatic missions, education institutions, libraries and other key business in Zanzibar and mainland Tanzania.

The Directory will contain information about Zanzibar hotels, tour companies, attractions and services, and the layout will include a foreword from the Minister, an introduction from the Commission for Tourism, ZATI and ZATO, a background section on Zanzibar – including history, culture and festival calendar, features, hotel listings, tour company listings and additional information such as eco-tourism and cultural events. The publication could be completely, or part paid for by advertising.

Expected cost: US$ 40,000

A Destination Zanzibar DVD: To help promote Zanzibar, produce a five minute destination marketing film to give to tour operators and to show at exhibitions. The DVD will showcase the best of what Zanzibar has to offer, clearly complying with the new branding of Zanzibar. A total of 10,000 copies to be distributed worldwide with complimentary circulation. As with the Tourism Directory, it could be part funded by sponsorship. The DVD should be placed on You Tube so it can also be available to the general public for viewing.

Expected cost: US$ 100,000

Step 1: Design and Production of Marketing Materials

The following marketing materials are proposed to launch the new Zanzibar brand:

Zanzibar Map: To assist with directing tourists around the Islands and to highlight its many attractions, 10,000 maps of Zanzibar should be produced which show both the island as a whole and a more detailed map of Stone Town. The map will have listings of hotels, restaurants, gift shops, services and other places of interest. Advertising will be available. The map should be full colour A2, printed front and back, with a print run of 10,000 copies worldwide and circulation complimentary.

Estimated cost: US$ 20,000

***Zanzibar Posters*:** A number of posters should be made in order to provide a more visual experience of Zanzibar at trade fairs. For WTM The Commission for Tourism should be involved in the design of the Tanzania stand at the exhibition and provision should be made to display these. There should also be colour posters to give away with a print run of 2000 copies x 4 designs = 8000 copies, and circulation complimentary

Estimated cost: US$ 10,000

Note: consideration should be made with regards to languages used in these marketing materials, to ensure both core and new targeted markets are catered for. It is expected that the key languages will be English and German.

Step 2: Develop Online Presence

The Internet, and in particular Web 2.0 environment (where users can upload information) has made it easier for potential visitors to build a picture of a destination by obtaining information from people they have never met (e.g., TripAdvisor.com). It also enables them to provide opinions to others worldwide, to exchange photos, videos, and create their own stories about a destination for all to see. This means that more than ever before, the destination experience must match the brand promise.

The key points regarding user-generated content and social networking are:

• Far from being a threat to the brand, user-generated content offers a significant opportunity to increase brand awareness and marketing impact.

• Even though a tourist board has little control over content, evidence shows that most postings are likely to contain images and messages that enhance the brand's impact and reputation rather than damage it.

• The credibility associated with a narrative from a real visitor's perspective will generally far outweigh any lack of brand compliance.

• Similarly, the odd negative posting will merely serve to enhance the credibility of the site, as long as positive postings remain in the majority.

• Total control of messages about a destination is not possible in the Web 2.0 environment. Tourist boards that try to exert such control will lose valuable marketing opportunities and may even damage their brand if they are seen to suppress all but good news about their destination.

Step 2: Develop Online Presence

Zanzibar should not be left behind in this aspect of its marketing. An e-marketing specialist should be contracted to advise on the development of a website, search engine optimisation, and the use of social media such as Facebook to ensure maximum impact with our target markets.

However, it is important that this online presence reflects the brand values that have been established for offline marketing (brochures, posters, etc).

The following should be developed:

• Attractive, dynamic and highly visible website for Zanzibar: explore possibilities for users to exchange views and post experiences in a "chat room" feature on the site. A good example is www.mambomagazine.com which launches in December 2010.

• Online reservation portal. Explore options (e.g., Expedia) for developing an online reservation portal to enable fast, direct bookings for accommodation and domestic transfers and tours.

• Social Media: Facebook and Twitter are two of the most prominent social media tools. The use of these (and others) for marketing should be explored.

• Search Engine Optimisation (SEO) marketing campaigns: these work by establishing the level of online activity and interest that currently exists in identified markets (e.g. Scandinavia) for the type of holidays that are available in Zanzibar (e.g. sun, sea and sand, history and culture, etc). This research can then be used to shape the search engine optimization campaign for the Zanzibar website to ensure that it can be easily found by the target markets.

Estimated cost: US$ 30,000

Step 3: Target the Markets

1. Consumer Print Advertising: should be developed by a selected media buying agency, to maintain a presence in key titles, with the presence being increased during key booking and research times. Initially should be focused in key markets.

- Newspapers: international markets (although potentially expensive); and within Africa to attract locals and expatriates.
- Magazines: niche special interest titles relevant to target markets, such as diving, adventure (Wanderlust, Conde Nast, etc).

Expected cost: US$ 40,000

2. Direct Mail: develop a consumer database from presence at trade shows, online campaigns and competitions.

- eNewsletters are an effective way to reach persons on this database, who will have previously shown interest in Zanzibar.

Expected cost: US$ 5,000

Step 3: Target the Markets

3. Public Relations: contract an international firm (or firms) to increase awareness of specific products (such as unique culture), understanding and interest in Zanzibar as a tourism destination to the consumer and trade markets.

Expected cost: US$ 35,000 (per country representation)

4. Joint Venture Marketing: Zanzibar should seek trade partners/members to work alongside the ZCT for advertising joint ventures. However, all advertising joint ventures should follow the brand guidelines, include the web address and logo, and ensure minimum 50% contribution from the member or trade partner. The senior partner would be the private sector/operator/investor, who would be the major funder.

Expected cost: US$ 5,000

5. Consumer/Trade Shows: Relaunch of the new Zanzibar brand to be done at local (such as Karibu), regional (such as INDABA) and International (such as WTM – London, ITB – Berlin, Arabian Travel Market - Dubai) trade and consumer shows. Collaborations with the TTB as well and members and trade partners should be explored.

Expected cost: US$ 25,000

3.3 - 24-month Marketing Plan

Action	2011				2012				
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Estimated Cost ($)
Tourism Directory	X				X				40,000
Destination DVD	X								100,000
Map	X				X				20,000
Posters	X				X				10,000
Online Presence		X	X	X	X	X	X	X	30,000
Print Advertising				X	X	X	X	X	40,000
Direct Mail					X	X	X	X	5,000
Public Relations					X	X	X	X	35,000
JV Marketing			X	X	X	X	X	X	5,000
Trade Shows			X	X	X	X	X	X	25,000
TOTAL Budget									**310,000**