The Influence of a Branding Strategy for the MED Region to Secure a More Stable Market Position

The Future of Mediterranean Tourism

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Managing Director
Yellow Railroad
Background - Experience

- Managing Director, Yellow Railroad
- CEO, Scottish Tourist Board
- Visit Britain: USA, Scandinavia, Southeast Asia
- Consultancy:
  - destination branding/marketing strategies
  - tourism policy
  - community / eco-tourism strategy
  - organisational development & crisis recovery
- Writer & lecturer on destination branding & marketing, travel trends
Consultancy Projects

Bosnia

Yorkshire, England

Norway

Dominica

Kenya-Laikipia

England

Cameroon

Tunisia

Malta

Namibia

Gabon

Wales

Rwanda

Scotland

Mozambique

Barbados

Yorkshire, England
1. Travel Trends
2. What is a Brand?
3. How is the Mediterranean Perceived?
4. What Future for Mediterranean Tourism?
Travel Trends: What Do People Want?
A Changing World

Just over 30 years ago (1981):

- NASA space shuttle maiden flight
- BMW 1st in-car computer
- IBM launches 1st personal computer
A Changing World

In 10 years time (2022) ....................?

**Pessimistic Scenario:**
- Travel no longer a pleasure?
- Virtual reality?
- Cost of oil, energy, water

**Optimistic Scenario:**
- Escape - Change of scenery?
- Real vs. digital world?
- New experiences:
  - e.g. space travel, attractions, luxury
Travel Motivation

* “Feel Fulfilled”

* “Fly and Flop”

* “Bling and Buy”
Travel Motivation: “Feel Fulfilled”

- Escape
- Undiscovered
- Authenticity
- Experience
- Personal fulfilment
- Look & learn
- Active relaxation

- “Old”, western Europe
- North America
- Australasia & Japan
Travel Motivation: “Fly & Flop

“Sunticipation”

- Demographic profile
- Families
- Resort-based
- Price is important

- Northern Europe
- “New”, eastern Europe
- Russia
Travel Motivation: “Bling & Buy”

- Ostentatious consumption
- Best available
- Social status
- Wealth demonstration
- “Look where I’ve been”
- “What’s global warming got to do with me?”

- “New”, eastern Europe
- Russia, China
- Brazil, India
Trends in larger established markets
Trends - The Problem

Le stress
Trends - Escape

- Change of pace
- Emotional recharge
“Switch off”

- Personal space
- Tranquillity….austerity
- Ability to choose
- Uncontactable = status
Trends - Escape

Reconnection

- Self
- Partner
- Family
- Grandparents
Antidote to Stress

ARRIVED WITH A THOUSAND THINGS ON OUR MINDS DEPARTED WITHOUT A CARE IN THE WORLD.

It's true what they say: to find yourself sometimes you need to lose yourself. In Australia they call it a going "walkabout". And with such magnificent landscapes, breathtaking scenery and memories that will last a lifetime, it's no wonder people are finding themselves there every single day. Visit Australia.com to find out how you can go walkabout.
Trends - Escape

“Flashpacking”

- Comfortable activity
- Easy energy
Trends - Escape

“Safe danger”

- Adrenalin
- Extreme
Trends - Escape

Innovation
“The days of heroic travel are gone”
Joseph Conrad 1923

............... ................. unless:

• Unique experiences
• “Only there, then” - events
Trends - Undiscovered

* Countries → regions
* Iconic attractions → smaller, local
* Famous restaurants → “insider tips”
* Packaged entertainment → local festivals
Trends - Authentic

- Local flavour
- Real
- Non-intrusive
Trends - Authentic

- Slumtourism
Trends - Personal Fulfilment

“Dumbing-up”

- Expeditionary
- Pseudo research
- New skill
"Obviously, there's an age at which I can't hang-glide anymore, and that age might be 40 or it might be 80. Eventually, the physical constraints rule, but that doesn't mean the experiential component has to vanish."

(D Cravit, VP Zooeer Media – Comms Agency for CARP – Canadian Assocn for 45 +)
What Is a Brand?
What Are the Benefits of a Brand?

- Personality
- Distinctive
- Memorable

- Distinguish from competitors
- Build loyalty
- Premium price
So, What is a Brand?

* Product?
* Logo?
* Slogan?
* Image?
* Marketing campaign?
* Design style?
* Spirit / essence?

“Competitive Identity”

- Makes us different
- Makes us stand out
Branding is different from marketing:

* **Branding** = who you are – personality, essence

* **Marketing** = how you communicate this to your customers
But ……………

What is a Destination Brand?
“In the globalised world in which we now live, every place has to compete with every other place for share of mind, share of income, share of talent, share of voice.

Unless a place can come to stand for something, it stands little chance of being remembered for long enough to compete for any of this precious attention.

Most of us spend no more than a few seconds each year thinking about a country on the other side of the world.”

(Simon Anholt, Branding Places and Nations)
“So, unless that country always seems exactly like itself every time it crops up, there is little chance that those few seconds will ever add up to a preference for its products, a desire to go and visit the place, an interest in its culture, or, if we were prejudiced beforehand, a change of heart.”

(Simon Anholt, Branding Places and Nations)
Destination Branding: “Must Dos” & Risks
Destination Branding: “Must-Dos”

- Destination strengths - audit
- Core values & essence - brand
- Customer perceptions - research
- Residents’ buy-in -
- Competitor analysis
- Objectivity / honesty
- Focus

Distinctive  ➔  Impact / memorable!!
Destination Branding: Risks

- Stakeholder interests
- Political compromise
- Dishonesty
- Unclear thinking

- Bland
- Indistinct

Forgettable
Delivering the Promise

Unspoilt nature:
Delivering the Promise

Unspoilt nature:
Delivering the Promise

Unspoilt nature:
Delivering the Promise

Credibility:
Destination Branding: The Harsh Reality

* Perception is more powerful than reality
* People are less interested than you think
* You can’t avoid the truth

Clarity, focus, honesty
So much for the theory .......

but what about branding in “real life”? 
Namibia’s Situation

Problem

- Unknown sub-Saharan African country – better known for political past (if at all) than current tourism potential.

Solution

- Talk to consumers (visitors & non-visitors)
- Find out what they felt: positive & negative
- Identify core brand values
- Apply them consistently in marcomms
- Persuade stakeholders to use them too
Touch the untouched.

Namibia is a land of vast wilderness and virgin landscapes. It's a place where nature has defied the ravages of human intervention.

Most of it is unchartered and only a privileged few have set foot on its deserts and coasts.

This is a land of extremes: hot days and freezing nights, cold seas and hot deserts, harsh landscapes, wild animals and gentle people, thriving life in barren rock and sand, and landscapes of infinite vastness.

“I wonder if anyone has ever stood here before me?”
Where the silence speaks to you.

Namibia allows you the time and place to think.

The sheer wilderness of desert and rocks and the wild Atlantic that thunders onto the still sands of the Skeleton Coast are a real inspiration.

The ever-changing colours and fragrances are a constantly moving canvas upon which to paint your thoughts.

“I felt my place in the universe. It put me in touch with my soul.”
Like nowhere you’ve ever seen before.

Everywhere you look in Namibia nature and landscape surprise and amaze.

The strange and mysterious is all around you. From the primeval quiver trees to the shipwrecks on the Skeleton Coast. From tribal ceremonies to hailstones the size of tennis balls. From petrified forests to abandoned ghost towns.

“It’s like a different planet here on earth”
The ancient spirit of Africa.

We, the peoples of Namibia, say welcome.

All of Africa’s history is here. Our land is the home of some of Africa’s earliest people - the bushman and diverse tribal cultures like the Ovambo, Himba, Herero. Here, ancient languages spoken in ‘clicks’ co-exist alongside recent German colonial heritage and modern Africa.

We are one of the youngest nations in Africa. Our recent struggle to free ourselves from apartheid and external domination has given us a new sense of identity, confidence and purpose.

“I felt the ancient spirit of Africa breathing life into the nation’s future”
Core Elements of the Namibian Experience

**The Place**

**RUGGED**
Namibia has an elemental, pristine landscape that is unlike anywhere else.

**NATURAL**

**The Relationship**

**SOULFUL**
Namibia touches your soul; you feel humbled and awe-inspired by the vast space and tranquillity.

**The Visitor Benefit**

**LIBERATING**
You feel free. You can explore the country on your own terms.
The ancient spirit of Africa.

We, the peoples of Namibia, say welcome.

Namibia’s history is here. Our people, like some of Africa’s Bushmen and cultures like the Nama, Herero. Here, 11 languages spoken in ‘clicks’ live alongside recent German colonial heritage and modern Africa.

…of the youngest nations in the world…

I felt the ancient spirit of Africa breathing life into the nation’s future.”
“The quiet that surrounds you lets you look inside yourself somehow”

“When you look at the Namibian landscape, you can see the hand of God.”

“It’s all about the vastness and what it does to you as a person”
Lessons

- Listen to consumers (visitors & non-visitors)
- Find out how they feel and think about you - positive & negative
- Identify how they see your competitors
- Be honest!
- Involve destination stakeholders from the start
- Commitment & leadership must come from the top
Brand Toolkit

Aim = to help everyone look more Namibian

Branding Namibia  A Practical Guide
Brand in the Digital Era

facebook
flickr
tripadvisor
twitter

YouTube
3.

How is the Mediterranean Perceived?
Med? ....... Caribbean? ....... Asia?

- escape
- fun
- paradise
- away
- Beaches
- Green
- Scenic
- Attraction
- Relax
- Heritage
- Bliss Sea
- Friendly
- Beautiful
- Tranquil
- Diving
- Watersports
- Family-friendly
- Chilled History
- Cuisine
- Lots
- Eco
- Culture
- Different
- Active
- Sustainable
- Hiking
- food
- Reconnect
- People
- Warm
“Mediterranean” Associations

* Climate

* Coastal = beaches

* Lifestyle

* Healthy food
“Mediterranean” Associations

* Climate
* Coastal = beaches
* Lifestyle
* Healthy food
* Culture
But also ............................................

“Mediterranean” Associations
“….infinite variety, abundant beauty, glitter, glamour, mystery, stillness, history, culture, food, an amalgam of rich cultures, sights, sounds, smells, feelings that take you back ……..”

(US visitor)
“You can feel the energy in every stone, painting, ancient wall, well-traveled road and bridge.”

“You can see the story in the faces of …people”

“I see the region as through a kaleidoscope”

(US visitor)
"The Mediterranean doesn't exist to me ……individual countries have Mediterranean coastlines …… but I don’t see them as a collective whole just because they share the same sea."

"I don’t see the Med as a homogenised offer"

(UK visitors)
“Connotations of the Med for me formed years ago…………mostly about the south of France …….stylish (Promenade des Anglais), sexy (Bardot & Vadim), big yachts (Monaco), glam & expensive hotels (Cannes)…..”

(UK visitor)
“I would think about choosing a country, rather than saying « I’m off to the Med »....”

(UK visitor)

“......positive connotations in terms of quality of life ....living style, food & drinks, affability of people ....

................sun, joy of living, curiosity”

(Italian visitor)
Competitors

- Warm
- Water
- Welcome
- Wellness
- Weddings
- Walking
- Wide range of things to do
- Wildlife
- Culture
The Mediterranean: How Homogenous?
Which “Mediterranean”? 

 Depends on: 

- **Region of Med:**
  - European Med
  - Eastern Med
  - North African Med

- **Market Segment:**
  - Europeans
  - Americans
  - Russians
  - Arab/ Gulf
...or .4 types of Med:

- **“Mature”**
- **“Rising stars”**
- **“Changing”**
- **“Sleeping treasures”**

Per Taleb Rifai, UNWTO Secretary-General, ITB Berlin March 2012
Which “Mediterranean”?

Depends on:

- Region of Med:
  - European Med
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Which “Mediterranean”? 

**European Perceptions:** primarily France & Spain

- ✗ Beach holiday destination
- ✗ Mid-mass market
- ✗ Cote d’Azur
- ✗ Former era – “times have changed” – competition (Asia, Caribbean, South Pacific)

- ✔ Close and affordable
- ✔ Individual countries - hinterland beyond the warm coast
- ✔ Med lifestyle – food, relaxing with family / friends
American Perceptions: all Europe

- Warm part of Europe
- Intensely cultural
- Friendly people – personal experiences
- 3 continents: Europe, Africa, Asia
Which “Mediterranean”? 

Russian Perceptions: coastal

- Beach holiday
- Affordable
- Close
- Shopping
Which “Mediterranean”? 

Arab / Gulf Perceptions: coastal

- ✔ Family-friendly *
- ✔ Food *

(* specific countries only)
Market segmentation is critical............
Which “Mediterranean”? 

Segment: Northern European Families

- Culture
- Beach - affordable
- Mediterranean
- Beach - expensive

- South East Asia
- Caribbean
Which “Mediterranean”?

Segment: American “Empty-Nesters”

- Mediterranean
- Caribbean
- South East Asia

- Culture
- Beach - expensive
- Beach - affordable
Which “Mediterranean”? 

Segment: Russian “DINKS” 

- Culture 
  - Mediterranean 
  - South East Asia 
- Beach 
  - Caribbean - expensive 
  - Mediterranean - affordable
4.

What Future for Mediterranean Tourism?
What Future for the Med?

- **Opportunities:**
  - Image – different by market
  - Beyond the beach: hinterland, culture, people, experiences
  - Diversity: kaleidoscope of individual countries = rich experience
  - Proximity to markets (Europe)
  - Culture (North America)
  - Joint marketing (exhibitions, media supplements etc.)
What Future for the Med?

- **Issues & Challenges:**
  - Market segmentation:
    - Implications of new markets:
    - Separation of visitor segments?
    - Product differentiation
  - Hard choices between target markets?
  - Competitiveness: emerging destinations worldwide, product & service quality, VFM
  - Easy to book, easy to reach
  - Cooperation vs. fragmentation
  - Climate change – water shortage, temperature rise?
  - Global economy
  - Oil price
What Future for the Med?

- **Way Forward:**
  - Listen to visitors
  - Market segmentation
  - When to say “Med” vs. “my country”
  - Further away: “Med” = a region
  - Closer to home: “Med” = a concept
  - Unifying Med values:
    - climate, lifestyle, joie de vivre, cultural depth
  - Each country should agree & use “Med” values consistently
  - Volume growth potential: Russia, Gulf, N. America
  - Repeat visit potential – if brand is refreshed: Europe
  - Tackle out-of-date perceptions – reinvigorate the experience (Europe)
  - Maximise positive perceptions (European culture – America)
  - Refresh the Med brand by evoking the depth & richness of experience associated with the Med concept
What Future for the Med?

“THE MEDITERRANEAN.............

Much more than just a beach !!!”
Finally

you must tell a story
Place of Origin – The Story

Sardines
Place of Origin – The Story

Cornish Pilchards

Sardines
Tell a compelling story:

http://www.youtube.com/watch?v=X7MVtgXMcll