Branding a Country – The case of Zimbabwe

A Research Report

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ABSTRACT

"Almost all places are in trouble, but some are in more trouble than others"

Kotler, Haider & Rein (1993)

Kotler, Haider & Rein (1993) contend that all places are in trouble now, or will be in the near future. The onset of globalisation of the world's economy, country political dynamics and the accelerating pace of technological changes are some of the forces that require all places to learn how to compete on the world arena. Porter (1990) states that the framework for understanding a company's sources of competitive advantage can be extended to the level of nations. It is basically concerned with the question as to why some nations succeed in global competition when others fail. Nations must learn how to think more like businesses if they are to survive and should begin by identifying their competitive advantages and building on them. As countries compete for inward investment, tourism and export of goods and services-success or failure can accurately be chartered, and questions of reputation, image, identity and hence marketing and branding become central to the competitive edge (Olins, 1999). Faced with the challenge of a negative image, a country must adopt a proactive stance to correct this image. This is where the question of country branding comes in.

Branding a country for many is misconstrued and interpreted to simply mean designing a new logo for their country and possibly a slogan to go underneath it. However country-banding proponents highlight that there is a difference between nation branding and tourism promotion. It helps even less that there are so many communications agencies that perhaps frustrated by lack of pure strategy capacity to sell to governments, have fallen into the habit of

pandering to this misconception and simply selling logos and slogans to any government prepared to buy them (Anholt, 2003). However faced with the urgent need to address the crippling impact of a negative image, countries like Zimbabwe cannot simply wait and expect things to turn out for the better.

Kotler et al (1993) stress that places are not able to respond to negative images concerning their nations as quickly as negative perceptions are built, be it through media, word of mouth or other channels. As a result the importance of a pro-active response cannot be overemphasized. This study explores the current negative image of Zimbabwe and tries to define the root or source of this negative image. Having defined or spelt out what is thought to be the problem, the researcher than explores possible ways of how the stakeholders of Zimbabwe can rebrand their country reflecting on known success stories. Kotler et al (1993) contend that the central tenet of marketing places is that in spite of the powerful internal and external forces that buffet them, places have within their collective resources and people the capacity to improve their relative competitive positions. Zimbabweans in general believe that their situation has been sensationalised by the media and is not a reflection of what is on the ground. By adopting a proactive stance in rebranding their country, Zimbabweans will perhaps finally realise that when it comes to image, "being in possession of the truth is not enough, the truth has to be sold" (Anholt, 2003)

DECLARATION

To Whom It May Concern:

I **Sibonokuhle Gumpo** (Student number: **34462481**) declare that this research report is the product of my work as a Master of Business Leadership student of the School of Business Leadership (SBL), University of South Africa (UNISA). Where other sources, both academic and non-academic have been consulted, these are acknowledged in line with the University of South Africa, School of Business Leadership referencing requirements.

Signed: **Dated:**

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SIBONOKUHLE GUMPO

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GLOSSARY OF TERMS

(a) **Brand** – "A brand is a mixture of attributes, tangible and intangible symbolized in a trademark, which, if managed properly, creates value and influence. *Value* has different interpretations; from a marketing consumer perspective it is *the promise and delivery of an experience*; from a business perspective it is *the security of future earnings*;…Brands offer customers a means to choose and enable recognition within cluttered markets." (Brandchannel, 2004:no page)

(b) **Branding** – "Selecting and blending tangible and intangible attributes to differentiate the product, service or corporation in an attractive, meaningful and compelling way". (Brandchannel,2004: no page)

(c) **Brand associations** – "The feelings, beliefs and knowledge that consumers (customers) have about brands. These associations are derived as a result of experience and must be consistent with the brand positioning and the basis of differentiation". (Brandchannel, 2004: no page).

(d) **Brand awareness** – "The percentage of a population or target market who are aware of the existence of a given brand or company. There are two types of awareness: spontaneous, which measures the percentage of people who spontaneously mention a particular brand when asked to name brands in a certain category; and prompted, which measures the percentage of people who recognise a brand from a particular category when shown a list". (Brandchannel, 2004: no page).

(e) **Brand equity** - "The sum of all distinguishing qualities of a brand, drawn from all relevant stakeholders, that results in personal commitment to and demand for the brand; these differentiating thoughts and feelings make the brand valued and valuable" (Brandchannel, 2004: no page).

(f) **Brand strategy** – "A plan for the systematic development of a brand to enable it to meet its agreed objectives. The strategy should be rooted in the brand's vision and driven by the principles of differentiation and sustained consumer appeal. The brand strategy should influence the total operation of a business to ensure consistent brand behaviours and brand experiences". (Brandchannel, 2004: no page).

(g) **Country risk** – The potential volatility of foreign stocks, or the potential default of foreign government bonds, due to political and/ or financial events in the given country". (Investorwords.com, 2005: no page).

(h) **Stakeholder** – A stakeholder may be thought of as "any individual or group who can affect or is affected by the actions, decisions, policies, practices, or goals of the organisation" (Buchholtz, 2003:Page 70)

(i) **Key definition for this research**

Whilst many definitions of country branding exist, for the purposes of this research report the following definition will be used:

"The seduction of buyers to destinations for business or pleasure".

(Brandchannel, 2005: No page)

The phrases, "place marketing", "destination branding" and "branding a country" are understood to be synonymous for the purposes of this research, and will be used interchangeably.

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LIST OF ABBREVIATIONS

AIDS	Acquired Immuno Deficiency Syndrome
AIPPA	Access to Information and Protection of Privacy Act
EU	European Union
FDI	Foreign Direct Investment
GDP	Gross Domestic Product
IMF	International Monetary Fund
IOM	International Organisation for Migration
NGO	Non-Governmental Organisation
POSA	Public Order and Security Act
RBZ	Reserve Bank of Zimbabwe
SWOT	Strengths, Weaknesses, Opportunities and Threats
ZCT	Zimbabwe Council for Tourism
ZNCC	Zimbabwe National Chamber of Commerce
ZTA	Zimbabwe Tourism Authority

CHAPTER ONE

1.0 ORIENTATION

1.1 INTRODUCTION

"Products can be discontinued, modified, withdrawn from the market, relaunched and repositioned or replaced by improved ones. (Countries) do not have most of these choices. Their image problems may be founded in structural problems that take years to fix - David Gertner, Pace University" (Brandchannel, 2003:no page)

The Lonely Planet world guide on travel describes Zimbabwe as "more than a passing resemblance to a *National Geographic's* best of issue…a beautiful country and usually safe to visit" (Lonely Planet World Guide, 2005: no page). As of March 2005, ten countries had standing travel warnings against Zimbabwe: namely the United States, Britain, Canada, Germany, Australia, Sweden, Denmark, Finland, Italy and Belgium. The governments of these countries have advised their citizens against "all holiday and non-essential travel to Zimbabwe until the political situation in the country improves" (Ultimate Africa, 2005: no page). A nation's state department issues a travel warning against a country when it believes that its nationals are at risk when they travel to the named country. Amongst the most conspicuous government travel warnings is that of the USA which warns all US citizens not to travel to Zimbabwe because the country is perceived to be in a "political, economic and humanitarian crisis" (Ultimate Africa, 2005: no page). Historically the USA was one of Zimbabwe's major source markets for tourism arrivals.

It is not only the tourists that are shunning Zimbabwe. This Southern African country, once a much sought after investor's destination in the country's key industries of mining, agriculture, clothing/ textiles and tourism has witnessed potential investors fleeing by the dozens citing perceived country risk and previously established investors are packing and moving to neighbouring countries. Investors that have stayed on have scaled down operations. Zimbabwe is currently rated in category "D". a high country risk indicator (Investorwords, 2005: no page). "Zimbabwe's average annual percentage rate of inflation has risen from 56% in 2000 to a forecasted 448% in 2005; foreign debt as a percentage of GDP is projected at 83% in 2005" (Investorwords, 2005: no page). In all this mayhem centred on the perceived "negative image of Zimbabwe", it is the Zimbabwean people that have to face the consequences that come with being nationals of a country that has become a joke not only within the region, but also around the globe. Zimbabweans have had to endure high unemployment rates and bruised egos as they watch the image of their beloved Nation, once one of the icons of Sub-Saharan Africa being "sensationally scandalised" by the international press. The quality of living for the man on the street has continued to deteriorate with as much as 60% of the population of 13 million inhabitants living below the poverty datum line. It is therefore not surprising that the life expectancy of this country is currently 33 and 34 years for males and females respectively. As Zimbabwe celebrated its Silver Jubilee on the 18th of April 2005, i.e. 25 years of independence, its citizens were singing the "blues" as the majority struggled to make ends meet. Zimbabwe previously branded "Africa's food basket",

"Africa's Tourist's paradise" is today viewed as a tourist or investor destination to be avoided.   With minimal foreign currency inflows, the country has not had the capacity to meet its international commitments finding itself at odds with the IMF and the international financial community.

Zimbabwe's image on the international front shifted from "beautiful" to "ugly" in April 2000 when the government embarked on what was perceived to be a highly controversial land reform programme aimed at "correcting" the perceived injustices of the past that had resulted in over 80% of prime agricultural land in the hands of the white minority farmers and the black farmers who were in the majority, having to eke out a living on the remaining 20% of farmland.   Whilst it is generally agreed that the exercise of land redistribution was long overdue, it is perceived that the exercise was not carried out in an equitable and transparent manner.   This research report will concentrate on the image/ perception that Zimbabwe has obtained on the world arena in the aftermath of April 2000, and strategies that must be adopted to redress this image. To make the task that much more challenging, Zimbabwe has just been branded an "Outpost of tyranny" in February 2005 by Condoleezza Rice the United States Secretary of State, benchmarking the country alongside the seemingly notorious governments of Cuba, Burma, Belarus, Iran and North Korea. Mbeki, South African President termed this branding of Zimbabwe an "exaggeration". In the interim Zimbabweans who have been adversely affected by this negative branding of their country cannot continue to sit back and hope the negative utterances of opinion formers as well as the international media's continuous negative coverage of Zimbabwe

will come to a halt. "Taking a proactive approach to repositioning a country does not mean whitewashing the canvas, painting the desired picture of it and expecting that picture to sell" (Gilmore, 2002:284). It is believed that Zimbabwe's economic recovery will depend on international backing and it is for this crucial reason that initiatives to reposition the country must be carried out to change the current negative perception of this nation and lure the international community back to Zimbabwe.

Papadopoulos & Heslop (2002) affirm that country images exist and will continue to evolve with time, but without attention by the countries themselves these perceptions will often be based on misconceptions with potential negative short and long-term consequences. It is therefore vital for a country such as Zimbabwe to measure its existing image and use this knowledge as the foundation for taking action to enhance its positive attributes, and to improve upon the negative ones.

Morgan & Pritchard (2000) highlight the importance of destination branding when they argue that "the battle for customers…will be fought not over price but over the hearts and minds – in essence, branding…will be the key to success". Zimbabwe will have to adopt the "branding of a nation" marketing strategy out of necessity than choice as the country is on an economic and image "sick list" and is in dire need of exports, tourism and foreign investment. It is highly apparent that most of Zimbabwe's image problems are largely due to the perceived prevailing political environment in the country. Therefore as the researcher attempts to draw up a strategy to reposition the country, the

ability to outstrip political issues and focus on significant and compelling aspects of differentiation will be critical.   .

1.2   PURPOSE OF THIS RESEARCH

The primary purpose of this research will be to investigate how various stakeholders in Zimbabwe should brand their country through a brand strategy, which will create positive brand awareness, positive brand associations for the potential foreign investor or visitor against a background of negative country perception in the Global market. The research will seek to unearth the "talk" that the people of Zimbabwe (resident or in the Diaspora) must walk, to help turn around the image of their country. Anholt (2003) contends that perhaps the most critical component of any national branding strategy is creating a spirit of benign nationalism among an often divided and multi-racial populace (the exact public diplomacy equivalent of helping the employees of a corporation 'live the brand').

In brief the research seeks to answer the following question – *"How can Zimbabwe regain its image as one of Africa's prime tourist and investor destinations?"*

It is assumed that this research will help Zimbabwean stakeholders become aware of the ripple effects that a country's image can have on tourist arrivals and investors to the country, and that to change this perception, stakeholders might have to adopt a united, proactive stance. Anholt (2003) argues that the basic need for absolute consistency of behaviour is one of the first tenets of place marketing, and if there is no hope of achieving it within the nationals of the affected country, then there is no hope of building a brand. It is important

that Zimbabwe regains its previous status as it is assumed that this will directly result in the return of tourists (from traditional source markets) and investors to the country, and that Zimbabweans, whether resident in the country or in the Diaspora will regain lost pride as citizens of Zimbabwe.

1.3 STATEMENT OF THE PROBLEM AND SUB-PROBLEMS

As the debate of whether a country can be branded or repositioned to give it that competitive edge over its competitors rages on, it is worth noting that tangible examples of countries that have taken this route are actually available as role models. One of the most notable examples is Spain. Spain went into a long, self-destructive decline, which culminated into civil war and the country later degenerated into an isolated, poverty stricken, authoritarian anachronism; a sharp contract to what one viewed of modern Europe. Since Franco's death in 1975, Spain has been transformed into a modern, well-off European democracy. It was not only Spain's reality on the ground that changed, but also its image on the world scene. Spain carefully orchestrated and promoted its re-entry into the European family by embarking on a country branding strategy that was to change its fortunes for the better. The country brought the Joan Miro Sun symbol to the fore of its national brand; this symbol became an identifier for the national promotional programme, closely linked to national change and modernisation.

"Experts on location branding note that Spain is among the best examples of modern, successful national branding because it keeps on building on what truly exists. Its branding efforts incorporate, absorb, and embrace a wide variety of activities under one graphic identity to form and project a multi-faceted yet coherent, interlocking and mutually supportive whole. Joan Miro's

sun is used to graphically unify a myriad of activities, publicity events and ads even though the different programmes are driven by both public and private sectors. The result is that Spain's branding effort is both efficient and impactful – one symbol leverages everything together in the eyes of Spain and the world" (Gilmore, 2002: 282).

As one takes a closer look at Africa, (with the exception of South Africa which is currently on a country branding drive) there is not a single country that immediately stands out as an example of successful country branding. As the researcher attempts to draw up a country branding strategy for Zimbabwe, examples of nations that have embarked on this mammoth task with resounding success will have to be drawn from Western and Asian countries as well as what South Africa has done to date. Academic works and professional journals on this subject abound for Western nations whilst lack of academic work on Africa is conspicuous through its absence.

1.4 DELIMITATION OF THE STUDY

(a) The sampling frame might not be fully representative of all the relevant respondents views, as the study will be mostly focused on Harare and Bulawayo. Increased error may result as these respondents opinions might not be reflective of all Zimbabweans' views.

(b) Questionnaires will be sent out through e-mail, and hand delivered within the researcher's 100km radius therefore respondents without e-mail and not within this radius will not be included in the sampling frame.

(c)   Embassies not represented in Harare (e.g. those with offices in Pretoria also overseeing Zimbabwe) will not be included

(d)   Time frame – the time (slightly over 6 months) allocated for the research report will not be adequate to sufficiently cover all areas of this exploratory study.

(e)   Resource constraints – There is no monetary budget for the study, therefore the researcher will have to keep costs to a minimum. Results of the study might be adversely affected (e.g. small sampling frames; telephone follow ups to be kept to local calls, etc).

1.5   IMPORTANCE OF THE STUDY

Extant knowledge on branding destinations with particular focus on countries has been limited to Western and Asian countries. Although South Africa is currently undergoing national branding initiatives as seen through the formation of the International Marketing Council of South Africa in 2000 to create a positive and united image for South Africa, there still is not much empirical evidence on branding of African countries. This study will review western theory and models in branding destinations with focus on country branding. In this respect, the researcher will review literature on the following case studies of country branding: -

(a) Branding Latin & Central America – with particular reference to Brazil & Mexico

(b) Branding Dubai – City of Gold

(c) Britain – Branding Britain

(d) Canada – Branding Canada

(e) Thailand – Branding Thailand

(f) India – Eternally Yours - Branding India, a Tourism Initiative.

(g) Branding Wales

(h) Brand New Zealand

(i) Spain – An Example of successful national branding.

This study will use the case of Spain as the main country of reference as the researcher believes that Spain is a good example of a nation that has had to overcome major challenges to become one of the main sought after destinations in the world today. It is believed that drawing ideas from the branding experience of Spain will form the ideal motivational foundation needed in branding a country like Zimbabwe that today faces what appear to be insurmountable country image challenges. This research on Zimbabwe will contribute a different dimension to the relatively new concept of destination branding which has previously focused on western destinations.

CHAPTER TWO

2.1 FOUNDATION OF THE STUDY

This research has been built on the theories and models of destination branding by various authors starting with the founding theory of strategic place marketing advanced by Kotler, Haider & Rein (1993). The following six viewpoints on destination branding have formed the foundation of this study and are elaborated upon in Chapter Three under literature review:

Viewpoint One:

Theory of Strategic Place Marketing , (Kotler, Haider & Rein, 1993)

Viewpoint Two:

Target Market Analysis: Segmentation and Positioning Theory, (Perreault & McCarthy, 2002)

Viewpoint Three:

Gilmore's Framework for country branding, (Gilmore, 2002)

Viewpoint Four:

Gilmore's Positioning Diamond, (Gilmore, 2002)

Viewpoint Five:

Applying the Brand Box Model, (Caldwell & Frere, 2004)

Viewpoint Six (a):

The Anholt – GMI Nation Brands Index, (Anholt, 2003)

Viewpoint Six (b):

The National Brand Hexagon, (Anholt, 2005)

The research will be carried out as an explanatory study with the following key objectives:-

(a) The research report will concentrate on the image/ perception that Zimbabwe has obtained on the world arena in the aftermath of April 2000 and strategies that must be adopted to redress this image.

(b) To ascertain whether country images are powerful stereotypes that can influence behaviour in all types of target markets.

(c) To find out if a country's image may shift slowly over time or quickly as a result of intervening events (e.g. hosting of Olympics in the case of Spain; Hosting of Ms Tourism World in the case of Zimbabwe)

(d) To ascertain whether country political dynamics have a significant bearing on the brand equity of a country especially the Commonwealth withdrawal, the controversial land reform and others.

(e) To ascertain whether the break-up in relations between Zimbabwe and its former allies has had an impact on the country's image or not.

(f) To find out whether media reports can make or break a country's image.

(g) To ascertain whether people especially opinion leaders can affect a country's branding through expression of their individual thoughts.

2.2 RESEARCH PROPOSITIONS

This research will address the following propositions: -

P₁ (a) A country's image may shift slowly over time or quickly as a result of intervening events (e.g. hosting of Olympics in the case of Spain; Hosting of Ms Tourism World in the case of Zimbabwe)

(b) A country's stakeholders can actively reposition the image of their nation.

(Source of proposition: Kotler, Haider & Rein, 1993; Gilmore, 2002)

P₂ Country political dynamics have a significant bearing on the brand equity of a country especially the Commonwealth withdrawal, the controversial land reform and others in the case of Zimbabwe.

(Source of proposition: Kotler, Haider & Rein, 1993; Gilmore, 2002; Anholt, 2003 & 2005)

P₃ Media reports can make or break a country's image.

(Source of proposition: Kotler, Haider & Rein, 1993; Gilmore, 2002; Anholt, 2003 & 2005)

CHAPTER THREE

3.0 LITERATURE REVIEW

Opponents of country branding

Although it is now widely believed that a country can be branded, there are still opponents to this marketing strategy who believe that branding can only be applied to products and services within corporations and not to states or destinations. Michel Girard (1999) a French academic clearly stated in a paper presented in 1999, that "In France the idea of re-branding the country would be widely unacceptable because the popular feeling is that France is something that has a nature and substance other than a corporation. One can take a product, a washing powder for instance, and then change the name…A country carries specific dignity unlike a marketed product…In France it is unimaginable for Chirac to attempt to re-brand France". On the other hand country-branding proponents had diverging viewpoints.

Due to limitations of this study, the researcher will not dwell on literature review of opponents of country branding. Literature review of this study will predominantly focus on proponents of country branding.

Proponents of country branding

Anholt (2005), Caldwell & Freire (2004), Olins (2002), Gilmore (2002), Papadopoulos & Heslop (2002), Kotler, Haider & Rein (1993) and other proponents of country branding believe that active repositioning of a country through branding or strategic place marketing is an exercise that that can be conducted and carries great potential for countries.

Every destination has an image. Unlike brand or corporate images, those of countries are not directly under the marketer's control. Country images are

formed from a myriad of sources some of which might be termed reliable whilst the bulk tends to be based on unconfirmed sources and therefore highly suspect. The formation of country images relies heavily on individual perception. Perceptions in most cases are the direct result of "stereotyping, the process of generalising to an entire class of objects from a limited number of observations. Stereotypes develop over time as one classifies repeated observations into schemata, which are then correlated to form one's view of the world... Just like a product's brand name, a country's image is multifaceted and might carry large amounts of both factual and affective information" (Papadopoulos & Heslop, 2002: 295).

Destination branding with particular focus on country branding is still a relatively new concept. Despite this, there are indications that a lot of research has been done in this field to date. In the article "Country equity and country branding: Problems and prospects", Papadopoulos & Heslop (2002) highlight that research in this area consists of over 750 major publications, by more than 780 authors over the past 40 years. They hasten to add that research volume does not necessarily translate to subject understanding and know-how. Papadopoulos & Heslop go on to say that familiarity and acceptance of this phenomenon are still at relatively low levels especially amongst non-marketers. They highlight that what is understood is the *value* of the idea of branding a country but not the specifics of what such an exercise would entail if embarked upon.

Literature review of the theories and models of country branding used as a foundation for this exploratory study are as follows:-

3.1 VIEWPOINT ONE:

THEORY OF PLACE MARKETING: Kotler, Haider and Rein (1993)

Kotler, Haider & Rein's approach in branding a nation adopts a strategic place marketing approach which aims to revitalise otherwise seemingly hopeless cases of towns, cities, regions, and nations. For the purposes of this study, reference will be limited to the marketing or branding of a country ("place" will therefore be synonymous with "country" or "nation"). Kotler et al (1993) highlight the fundamentals that those tasked with the unenviable task of place marketing must confront if they are to change negative place images. Zimbabwe as a country is faced with a negative image in the global market that has seen tourist and investor interest dwindle to an all time low. Kotler et al (1993) affirm that as a rule of thumb, the marketplace shifts and changes at a much faster pace than a place's capacity to react and respond to these changes. Kotler et al further highlight that buyers of the goods and services that a country can offer (including but not limited to: businesses, firms, tourists and investors) have a decided advantage over place sellers or those that are trying to attract potential buyers to their country. Kotler et al affirm that the major challenge of place marketing is to strengthen the capacity of a country (through its various facets i.e. community, region, etc) to adapt to the changing marketplace, identify and seize opportunities around it , and sustain its vitality without losing sight of consistency amongst its various stakeholders as they work towards this common goal. If a country is to be successful in its branding exercise to the external world, Kotler et al highlight that strategic marketing, expects it to first start internally by satisfying the needs of its key constituencies. According to Kotler et al, place marketing succeeds when

firstly stakeholders such as citizens, workers and business firms derive satisfaction from their community, and secondly when visitors, new businesses and investors find their expectations met.

Four key activities of place marketing are highlighted by Kotler et al (1993): -

(1)   Designing the right mix of community features and services

(2)   Setting attractive incentives for the current and potential buyers and users of its goods and services

(3)   Delivering a place's products and services in an efficient, accessible way.

(4)   Promoting the place's values and image so that potential users are fully aware of the place's distinctive advantages.

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TARGET MARKETS

Exporters

Tourists
And
conventioneers

MARKETING FACTORS

Infrastructure

Investors

PLANNING GROUP

Citizens

Place marketing
Plan:
Diagnosis,
Vision,
action

Attractions

People

Business
community

Local/regional
government

Image and quality
Of life

New
residents

Manufacturers

Corporate
headquarters

Levels of Place Marketing (Kotler, Haider & Rein, 1993)

Figure 1(a): Levels of Place Marketing

Place marketing comprises six generic strategies that countries can use to improve their competitive positions:

    (1)   Attracting tourist and business visitors

    (2)   Attracting businesses from elsewhere

    (3)   Retaining and expanding existing businesses

    (4)   Promoting small business expansion and fostering new business start-ups

    (5)   Expanding exports and outside investments

    (6)   Expanding the population or changing the mix of residents

Kotler et al though outlining these six possible strategies, make it apparent that not all six will apply to every place with the same degree. In this regard, a country must first conduct its SWOT analysis, and thus identify its own competitive advantages and disadvantages. In addition to this a country must identify who its target markets are. Once this has been done, the country must work on improving the products and services that it intends to offer to these target markets. Once this is in place, the country must now determine how it can communicate its message to these markets.

Overview - How places "get into trouble" and what they should do to "get out of trouble".

Kotler et al highlight external and internal forces that may operate to erode a place's traditional markets and competitiveness. Identified external factors that a place can do little to avert are highlighted as technological change, intergovernmental power shifts and global economic restructuring. Internal

factors identified include major companies leaving (often as a result of these external factors) and economic recession. This development negatively impacts on businesses in the country, leading to high levels of unemployment. Consequently, the country's tax base stagnates or declines, resulting in infrastructural breakdown and compromise in general service deliverance. Undoubtedly the country becomes even more unattractive and additional businesses pack and seek greener pastures elsewhere. To compound to its base of existing problems, the country loses its ability to attract new businesses and tourists, brain drain sets as its own skilled labour starts to migrate.

Kotler et al affirm that if a country finds itself "in trouble", to help itself get "out of trouble" the following six fundamental tasks must be carried out: -

(1) The country (i.e. through its stakeholders tasked with place marketing) must interpret what is happening in its broad environment.

(2) The country (i.e. through its stakeholders tasked with place marketing) must understand the needs, wants, and behaviour choices of specific internal and external constituencies.

(3) The country (i.e. through its stakeholders tasked with place marketing) must build a realistic vision of what the place can be.

(4) The country (i.e. through its stakeholders tasked with place marketing) must create an actionable plan to complement the vision.

(5)   The country (i.e. through its stakeholders tasked with place marketing) must build internal consensus and effective organization.

(6)   The country (i.e. through its stakeholders tasked with place marketing) must evaluate at each stage the progress being achieved with the action plan.

Kotler et al (1993) contend that the above process is the essence of strategic place marketing (or country branding for the purposes of this research).

Identifying target markets for place marketing

Kotler et al present the four key target markets for place marketing as follows:

(1) Visitors (business and pleasure)

(2) Residents and workers

(3) Business and industry

(4) Export markets

Place marketing activities according to the authors are the domain of both the public and private sector players. One party without the other cannot undertake the country branding initiative successfully. They must work together.

Place Buyer behaviour model as identified by Kotler et al.

Kotler et al, highlight the various stages starting with buyer problem recognition, information search, evaluation of alternatives, purchase decision and post-purchase behavior and how they function within the target markets being pursued by places. The authors also highlight the importance place ratings and the fact that these play a significant role in place buying decisions.

(In the case of Zimbabwe the researcher will also analyse how travel warnings issued against the country and country ratings -e.g. *Forbes.com* rating of the most dangerous countries for 2005, affect place buyers, if at all)

The importance of a SWOT analysis

Kotler et al have highlighted six generic strategies that countries can adopt to improve their competitive positions (please see page 19 of this report). However, before embarking on the six strategies, a country must first carry out its SWOT analysis (i.e. establish what its resource strengths and weaknesses and its external opportunities and threats are). Strickland (2003: page 117) contends that "SWOT analysis is grounded in the basic principle that *strategy-making efforts must aim at producing a good fit between a* **company's**[1] *resource capability* (as reflected by its balance of resource strengths and weaknesses) *and its external situation* (as reflected by industry and competitive conditions, the **company's** own market opportunities, and specific external threats to the **company's** profitability and market standing).   A country must also conduct is SWOT analysis following the guidelines outline above. Strickland (2003) defines strength as something that a company does well and it can take the form of skills or expertise; valuable physicals assets; valuable human assets; valuable intangible assets amongst others. On the other hand, a weakness is defined as something that a company lacks or does poorly or a condition that puts it at a disadvantage (Strickland, 2003). Kotler et al emphasize the importance of conducting a SWOT analysis as assessment of a country's strengths, weaknesses, opportunities and threats.

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[1] Word *"company"* to be replaced with *"country"* for the purposes of this research.

Strategies for place improvement

Kotler et al (1993) highlight that strategic place marketing goes beyond promoting the image of a place. Product improvement is also a fundamental factor that must be tackled if the marketing initiative is to be a success. The authors go on to suggest that a strategic place-marketing plan should consider improvements that should take place in the following 5 key areas:

   I. Urban design – important especially for potential investors.

   II. Infrastructure – All visitors would prefer to visit or invest in a country with a sound infrastructure.

   III. Basic services such as fire, police and education are an expectation for all target markets.

   IV. Attractions – These must be identified and highlighted to potential place buyers.

   V. People – Kotler et al discuss this last category primarily in terms of the kinds of stereotypes that may apply to the inhabitants of an area (e.g. residents of Sicily are criminals, those living in the deep south are friendly but slow-moving), and then go on to discuss ways in which negative stereotypes may be overcome and positive images capitalized upon for the benefit of the country.

Place image – building on positive/ correcting negative

Kotler et al discuss a place's image, and strategies that places can use to build on a positive image, if they are fortunate enough to have one, and how to go about correcting a negative image. The following five factors are

highlighted as critical to the development of an appropriate and useful place image:

    I. The place image must be valid

   II. The place image it must be believable

  III. The place image must be simple

  IV. The place image must have appeal

   V. The place image must be distinctive

The country must then audit the advantages and disadvantages of the various tools that are available for communicating an image: e.g.slogans, themes and positions; visual symbols; and events and actions.

Once the product has been improved and the image has been developed, the stakeholders must now look at how they are going to go about promoting the new image/ brand to the various target markets that they would have identified (e.g. visitors for both business and pleasure; potential investors and so on).

Promoting to target markets

Various channels are available for promoting a place image. A country's taskforce responsible for this course of action must identify the channels most suited to their cause. Kotler et al, highlight the following:

    I. Advertising

   II. Direct marketing

  III. Sales promotions

  IV. Public relations

   V. Personal selling

VI. Television images

VII. Songs (e.g. "I left My Heart in San Francisco" for San Francisco; "This is our land, our Zimbabwe", in the case of Zimbabwe?)

VIII. Sports teams

IX. Sites (e.g. the town of Dyersville, Iowa, which became a tourist Mecca after the movie Field of Dreams; Zimbabwe's tourist attractions?)

Evaluation of the above must be carried out to assess success or lack thereof, of promotional strategies embarked upon.

Preparing for change

We cannot become what we would become, by remaining what we are. In the same vein, if Zimbabwe's stakeholders are serious about correcting their nation's negative image, then they must organise themselves for change. Kotler et al discuss the challenges that community leaders will increasingly face in future regarding images, and the responses that strategic place marketing must consider:

Key challenges facing places

Challenge One: Places are increasingly at risk as a result of the accelerating pace of change in the global, political and technological environment.

Challenge Two: Places are increasingly at risk as a result of normal processes of urban evolution and decay.

Challenge Three: Places are facing a growing number of competitors in their efforts to attract scarce resources.

Challenge Four: Places have to rely increasingly on their own local resources to face the growing competition.

Responses to the challenges highlighted:

I. Places need to establish a strategic vision to face these challenges.

II. Places need to establish a market-oriented strategic planning process to face these challenges.

III. Places must adopt a genuine market perspective toward their product and consumers.

IV. Places have to build quality into their programmes and services to compete with other places.

V. Places need skill to effectively communicate and promote their competitive advantages.

VI. Places need to diversify their economic base and develop mechanisms for flexibly adapting to changing conditions.

VII. Places must rely more on the private sector to accomplish their tasks

VIII. Each place needs to develop its own unique change process as a result of differences in the place's culture, politics and leadership processes.

IX. Places must develop organizational and procedural mechanisms to sustain place development and maintain momentum once it has begun.

3.2   VIEWPOINT TWO:

TARGET MARKETING ANALYSIS: SEGMENTATION AND POSITIONING

THEORY

Perreault & McCarthy (2002) contend that this marketing strategy process
highlights opportunities as it narrows down to focused strategy with
quantitative and qualitative screening criteria. It also takes into cognizance
the impact of the external market environment (i.e. technological; political and
legal; cultural and social; and economic issues). This theory will allow the
researcher to initially explore potential opportunities before narrowing down to
the specifics in the branding of the country strategy.
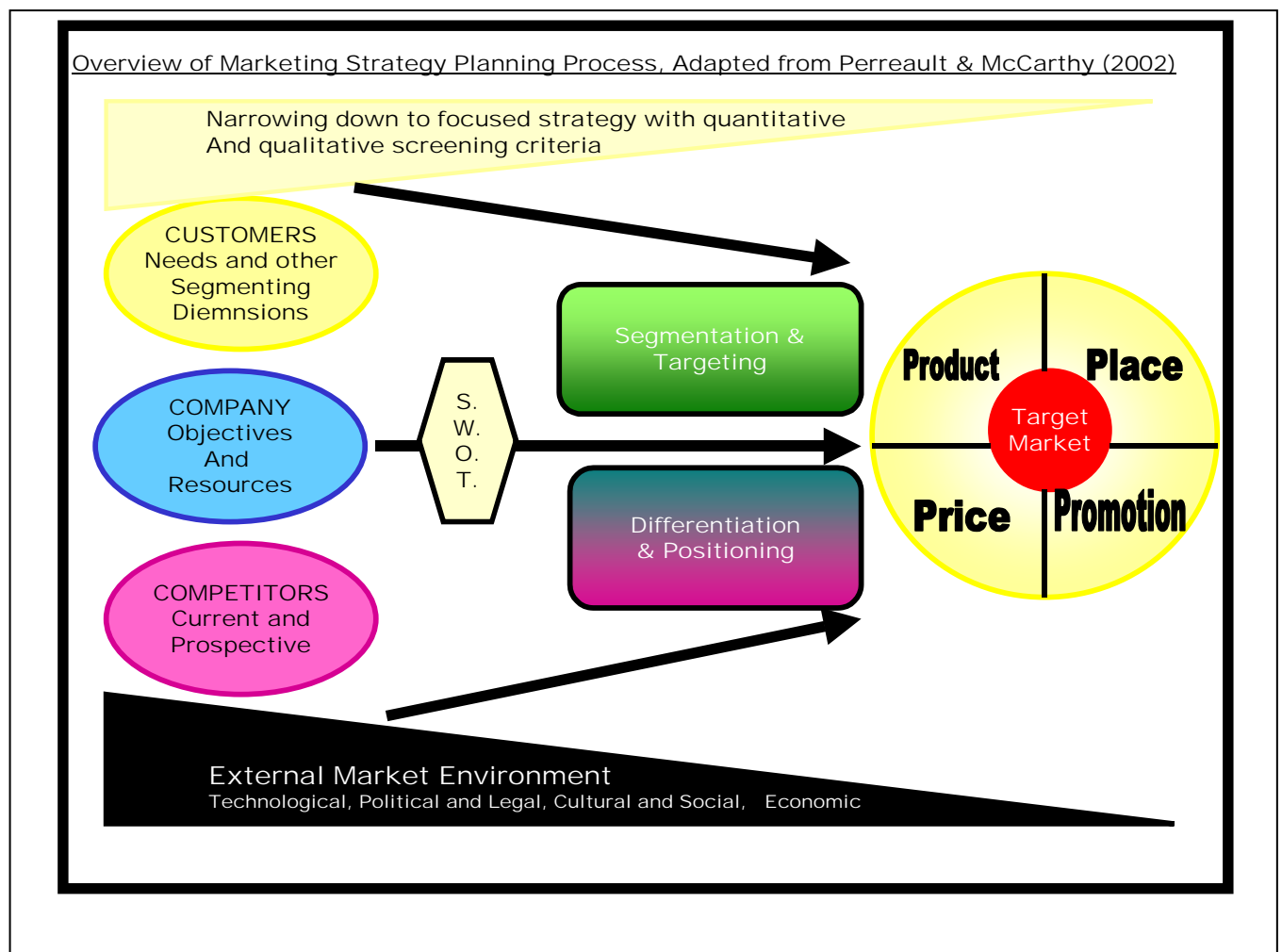
Figure 1(b): Overview of Marketing Strategy Planning Process

3.3   VIEWPOINT THREE:

<u>**GILMORE'S FRAMEWORK FOR COUNTRY BRANDING**</u>

Most executive managers today believe that the brand of their organisations must sit at the heart of the organisation, driving its strategy and its direction (Gilmore, 2002). This ascertainment is in contrast to traditional thinking where it was believed that branding was the responsibility of the marketing function within an organisation. Gilmore argues that it is imperative for the brand to sit at the heart of the organisation as it represents the core values and ideology of the organisation. In the same vein, Gilmore believes that a brand of a country must sit at its heart.

In her Framework for Country Branding, Gilmore argues that the core of a country's brand must capture the spirit of its people and their common vision, emphasizing that the spirit of the people and the spirit of the country are deeply connected. The spirit of the people embodies deeply seated values that endure the test of time, and remain constant through changing circumstances as these represent what the country's nationals believe in and believe about themselves. Gilmore affirms that identifying and articulating this unique spirit is difficult although it is a very strong component of the country's brand. She cites examples of the different spirits of the people of Hong Kong and Wales and how each has aided in the branding of the respective countries. The researcher has adapted **Figure 2– The Brand At The Heart Of The Country** from Gilmore's illustration of the same title to suit the context of the study (i.e. Branding Zimbabwe). Therefore targeted stakeholders are specific to the Zimbabwean context.
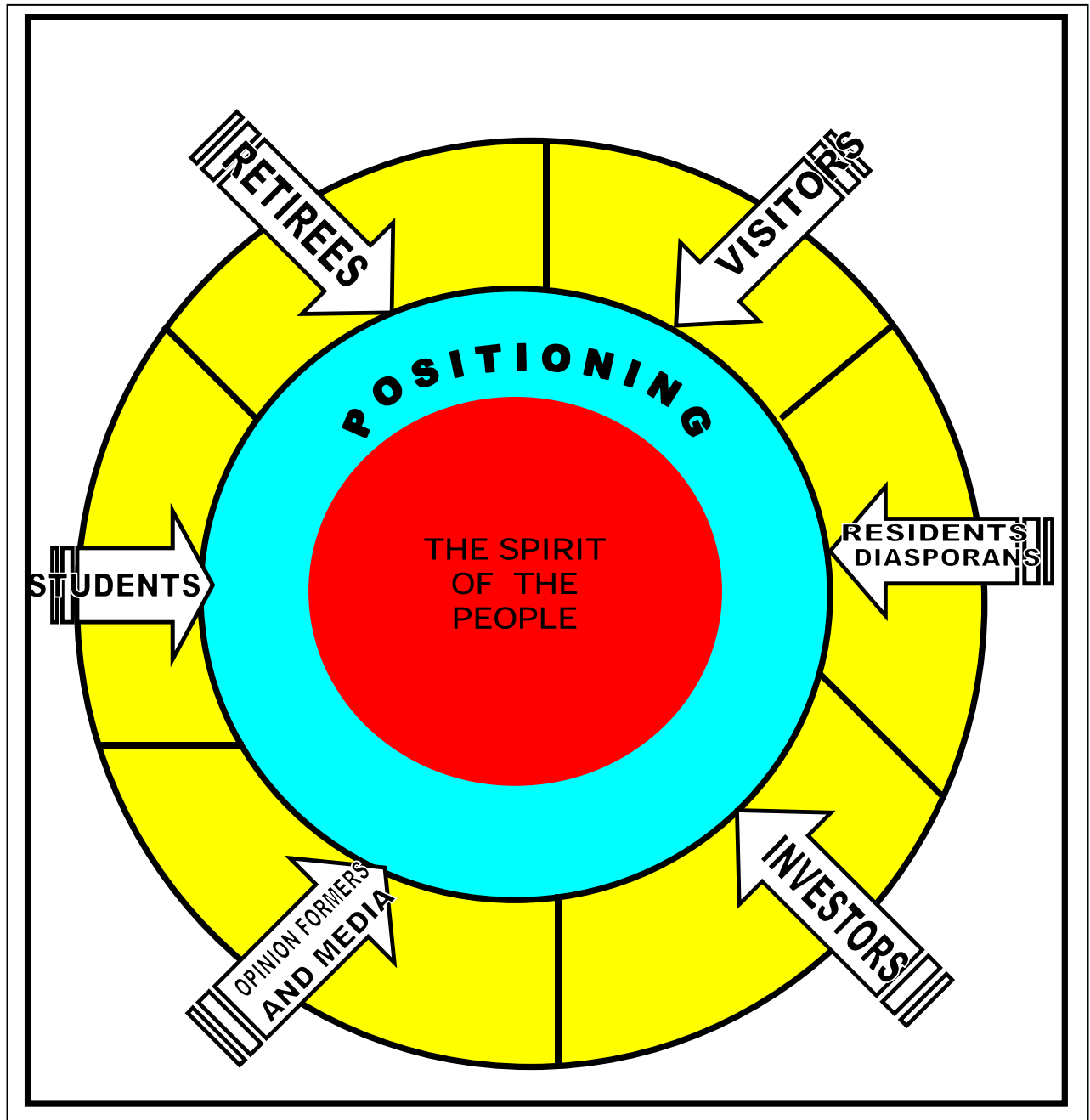
Figure 2: The Brand At The Heart Of The Country

- *Inner circle – represents the core of the framework –* i.e. the spirit of the people as explained above.

- *Middle layer – Positioning of the country.* This will be derived from the country's core values and spirit of its people. Gilmore argues that this positioning must be -"aspirational, inspirational, challenging and differentiated" and "translatable" for the different stakeholders.

"Aspirational" and "inspirational" mean that for the brand to make any meaningful headway, it must first win the hearts and minds of the people.

- *Outer layer – represents the complexity and diversity of the various stakeholders*

The positioning must be "translatable" because the country branding strategy must address various stakeholders with its positioning.

3.4   VIEWPOINT FOUR:

GILMORE'S POSITIONING DIAMOND

The positioning diamond takes into consideration four key factors namely:- (1) macrotrends (2) target audience/ stakeholders (3) competitors (4) core competencies (Gilmore, 2002). The process of using the positioning diamond is very important as it will encourage the researcher to analyse the priorities of the branding exercise, think broadly we well as to narrow the parameters governing the development of the intended country's brand.

MACROTRENDS

STAKEHOLDERS

COMPETITORS

CORE COMPETENCIES
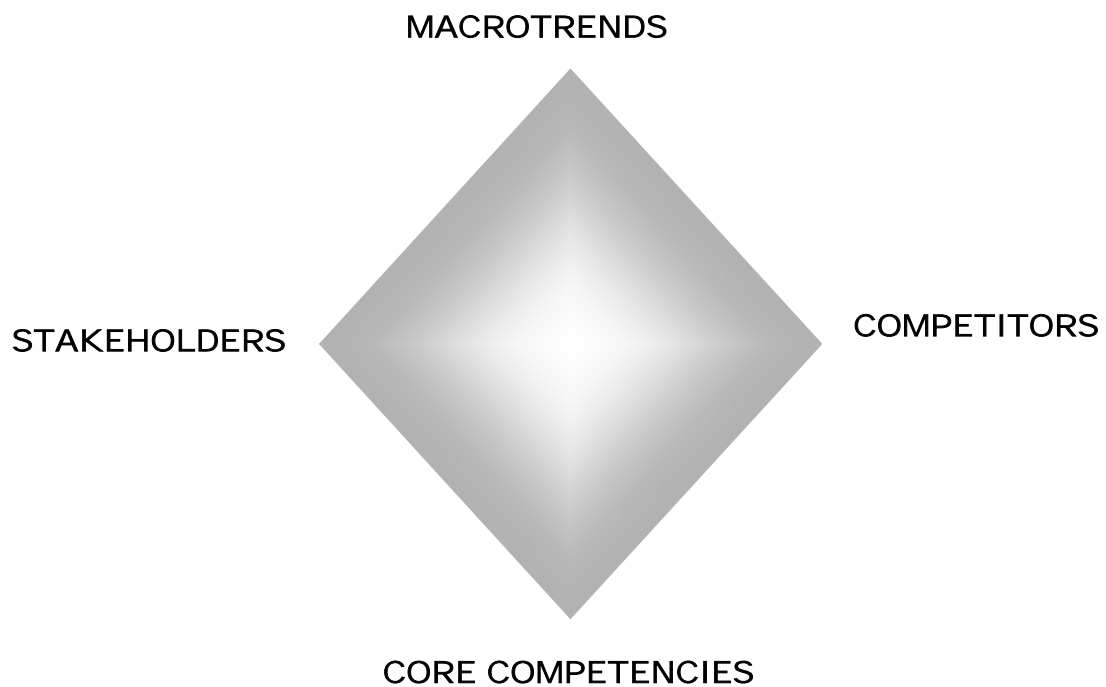
FIGURE 3: A POSITIONING DIAMOND MACROTRENDS (Adapted from Gilmore, 2002)

Figure 3– illustrates the positioning diamond macrotrends.

(1)   Macrotrends

According to Gilmore macrotrends affecting a country include the following (among others):-

- Socio-economic trends

- Political and legal status

- Population trends

- Cultural and lifestyle trends

By analysing the above macrotrends the researcher will be able to place Zimbabwe into its current image context and help to highlight the challenges the country is facing and could face in the future. Gilmore states that possible questions that might arise from a macrotrend analysis include (but are not limited to): -

- Is the economy of the country being dominated by traditional economic sectors and does it need to be diversified?

- Is there a labour shortage in the country and why is that so?

- Are people moving out of the country into neighbouring countries and what are they pursuing? Why are they leaving?

(2)   Stakeholders/ Target audiences

A country like Zimbabwe is bound to have many stakeholders from diverse backgrounds. Examples of stakeholders include (but are not limited to): -

- Present and future residents (including Zimbabweans in the Diaspora in the case of Zimbabwe)

- Investors (local and foreign)

- Students

- Skilled workforce

- Tourists

- Media and opinion formers

- Tour operators/ travel agents/ Airlines

- Foreign governments and foreign investment/ economic development bodies

- Export purchasers

Gilmore stresses that stakeholder categories are not mutually exclusive e.g. a student of a country could be a future investor, in the same way that a tourist of today could be an export purchaser in the future. Due to these overlaps in stakeholder categories, it is critical that the overall brand of a country be holistic and address the needs of the key stakeholders. By defining its stakeholders, a country is better positioned in the definition of the scope of its branding project and whom it is trying to attract.

(3)   Competitors

On embarking on a branding strategy, a country must carry out an audit of its competitive landscape. This way the country will be able to build on the unique strengths that it possesses. For example Zimbabwe would have to look at positive features that are unique to it and build on these in its branding exercise.

(4)   Core competencies

There are two broad types of core competencies that are highlighted by Gilmore (2002) in country branding, which are also brought up by Kolter et al (1993). Namely:-

(a) *Physical assets*

In most cases this will translate into the country's natural resources e.g. Zimbabwe's tourist attractions; platinum deposits; and coal deposits.

(b) Human assets

The branding exercise must also identify exceptional individuals (in the arts, sport, etc) as it is these individuals who will have the potential to place their country on the world map. Gilmore (2002) affirms that exceptional individuals and their exceptional stories have the potential to bring a country's brand alive and make it more real to audiences worldwide for the simple reason that people relate to people.

(5)   Citizen Migration

A country's brand must be used as the anchor upon which to build loyalty with its people (Gilmore, 2002). It is vital for a country to be able to retain the loyalty of its citizens if it is to be successful in its branding initiatives. Undoubtedly, each citizen of a country becomes the living embodiment of that country's brand. The way a nation's citizens carry themselves whilst away from their home country is a reflection on their country's brand. Gilmore (2002) contends that Building citizen loyalty may also be seen as a migration of hearts and minds, where the aim is to move citizens who are *uniformed skeptics* to become *informed believers* as illustrated in **Figure 4 (**on page 34).

UNIFORMED BELIEVERS	INFORMED BELIEVERS
UNIFORMED SCEPTICS	INFORMED SCEPTICS
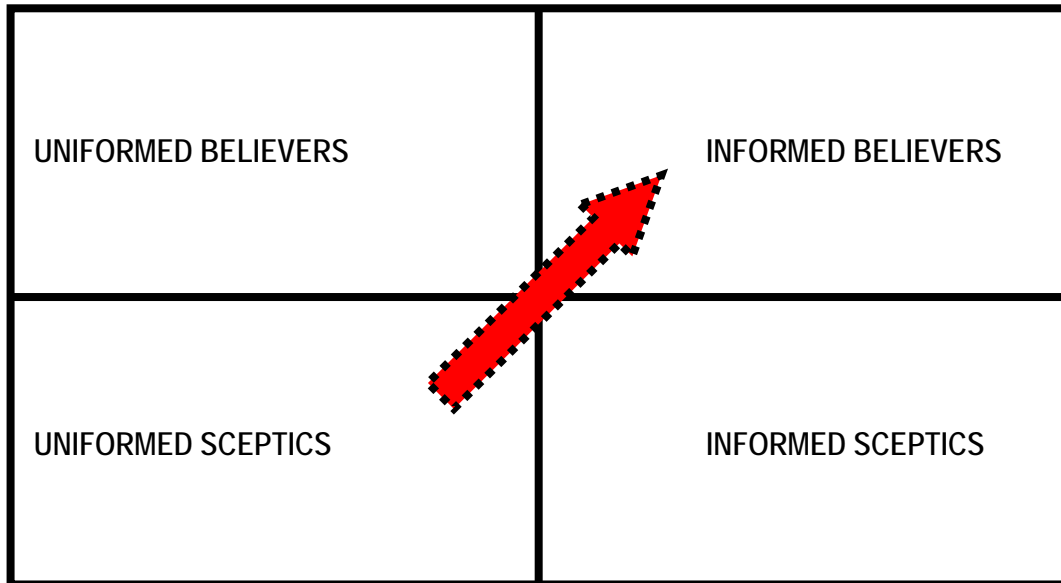
FIGURE 4: CITIZEN MIGRATION

Sceptics refers to those citizens within a country who are becoming disillusioned with their countries institutions, policies, culture and activities. If *sceptics* are left to their own devises they have enough ammunition to derail any initiatives that come with branding a country, as they have no pride in their nation. They might even choose to migrate to what they see as greener pastures. Country branding strategies must counteract these negative challenges by coming up with tactics to reign in fleeing talent through brain drain and convert *sceptics* into *believers*.

3.5   VIEWPOINT FIVE:

APPLYING THE BRAND BOX MODEL

Another challenge that presents itself as the researcher attempts to come up with a strategy for branding Zimbabwe is that emerging empirical evidence in branding destinations, highlights that strategies that have worked successfully in branding cities and regions might not necessarily apply in branding a country. In the literature on destination marketing, researchers often do not clearly define what they mean by *destination*.   The word is used interchangeably to refer to countries, regions and cities. O'Shaughnessy & O'Shaughnessy (2000) point out that "the image of a nation is so complex and fluid as to deny the clarity implicit in a term such as brand image". They go on to argue that even if a country has a strong international presence, current political events may change different parts of the country's overall identity. Caldwell & Freire (2004) conducted a research to examine if differences exist in branding different types of tourist destinations – namely a country, a region or a city.   They adapted the Brand Box Model, a marketing model originally developed by de Chernatony & McWilliam (1990) for physical and service products.   The Brand Box Model presented two key dimensions that could clarify the strength of a brand – namely representationality and functionality. The first dimension, *representationality* is built on the premise that consumers use brands to help them express something inherent in their individuality, something about themselves. The second dimension, *functionality*, is based on the premise that consumers associate certain attributes with different brands i.e. the use of the brand name would play a role in the consumer's

decision making by addressing utilitarian issues e.g. quality, reliability, or taste. The two dimensions – representationality and functionality – are then used to create a four cell matrix (high-low functional-representational) as shown in **Figure 5.**
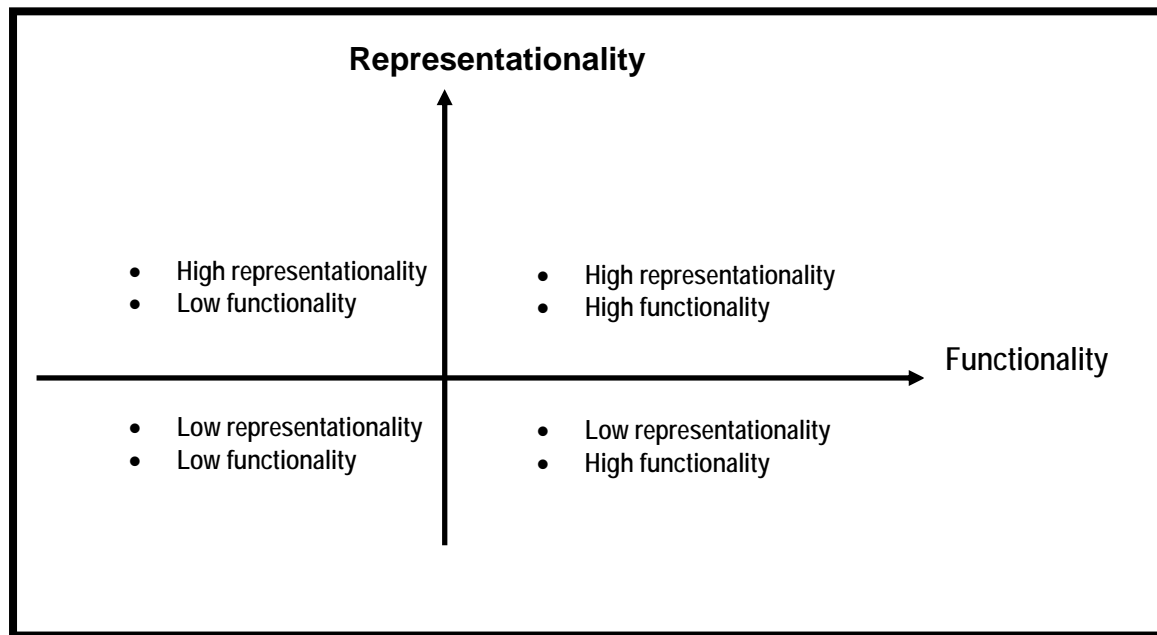
FIGURE 5: DE CHERNATONY'S BRAND BOX MODEL

Caldwell & Freire (2004) adapted the Brand Box model in their destination branding research to explore the application of the brand's functional and representational dimensions to countries, regions and cities. These two authors then went on to adapt de Chernatony and McWilliam's (1990) physical study attitude statements to attitude statements for destination brands as shown in **Table 1.**

The research concluded that because countries are so functionally diverse, they should focus on the emotional or representational dimensions of their brand. On the other hand, the study concluded that regions and cities should focus their branding efforts on the more functional facets. The researcher will take these findings into cognisance in the strategy to brand Zimbabwe.

Table 1: Adaptation of attitude statements for destination brands.

De Chernatony and McWilliam (1990) physical study attitude statements	Adapted attitude statements for destination brand study
Representationality	**Representationality**
This brand says something about its owner.	[Destination] somehow defines the people who travel there.
You've got to feel right among your friends owning this brand.	People feel right amongst their friends because they can say that they went to [destination]
People would buy this brand because they feel it associates them with a certain group of people.	People go to [destination] because they feel it associates them with a certain group of people.
Functionality	**Functionality**
You buy this brand more for its product characteristics than for its advertising.	People travel to [destination] not for its publicized image but more for its actual characteristics.
People buy this product because the company puts more effort into the product, rather than saying who'd be using it.	People go to [destination] not because the place emphasizes the sort of people who travel there but because the place puts more effort into creating a pleasant experience.
This product says more about the product's characteristics than the type of buyer.	When you think more about [destination] you think more about the region's characteristics than the type of visitor.

3.6   VIEWPOINT SIX (a):

The Anholt-GMI Nation Brands Index – Defining current image

The Anholt-GMI Nation Brands Index is the first analytical ranking of the world's nation brands. Every quarter a poll is conducted, drawing consumers from all over the world to gain their perceptions of the cultural, political, commercial and human assets, investment potential and tourist appeal of several developed and developing countries. These perceptions are then aggregated, and the end result is an index of a nation's brand power based on global opinion.

The Anholt-GMI Nation Brands Index indicates how consumers around the world view a country's brand. According to Anholt, the nation's brand is "the sum of people's perceptions of a country across six areas of national competence" (Anholt , 2003:no page).Taken together, these six areas make the Nation Brand Hexagon as illustrated in **Figure 6(a).**

According to Anholt (2003) every country has its brand strengths and weaknesses. This research will try and synergise the concept of a SWOT analysis as highlighted by Kotler in strategic place marketing, with Anholt's Nation Brand Hexagon in trying to establish where Zimbabwe's strengths, or competitive advantage lies, and how these can be accentuated in the rebranding exercise.

Figure 6(a)   The Nation Brand Hexagon (Simon Anholt, 2002)

3.6   VIEWPOINT SIX (b):

The National Brand Hexagon – Embarking on the Nation Brand Strategy

Whilst in 2003 Anholt set out to define the Nation Brand Hexagon with the view of spelling out a nation's current image through a SWOT analysis and as seen through "the sum of people's perceptions … across six areas of national competence" as highlighted in Viewpoint Six (a), in 2005 he revisits the model with a goal to adopting its "improved version" as the anchor for changing the country's image, through drawing up a Nation Brand Strategy as illustrated in **Figure 6 (b).**   Each of the highlighted six facets of the hexagon, namely

(i) people,(ii) promoting tourism, (iii) exporting brands, (iv) foreign and domestic policy, (v) inward investment, recruitment and culture must be coordinated in such a way that the overall message emanating from the country is a unified one conspicuously highlighting the country's strengths.

Figure 6 (b): The National Brand Hexagon (Adapted from Anholt, 2005)
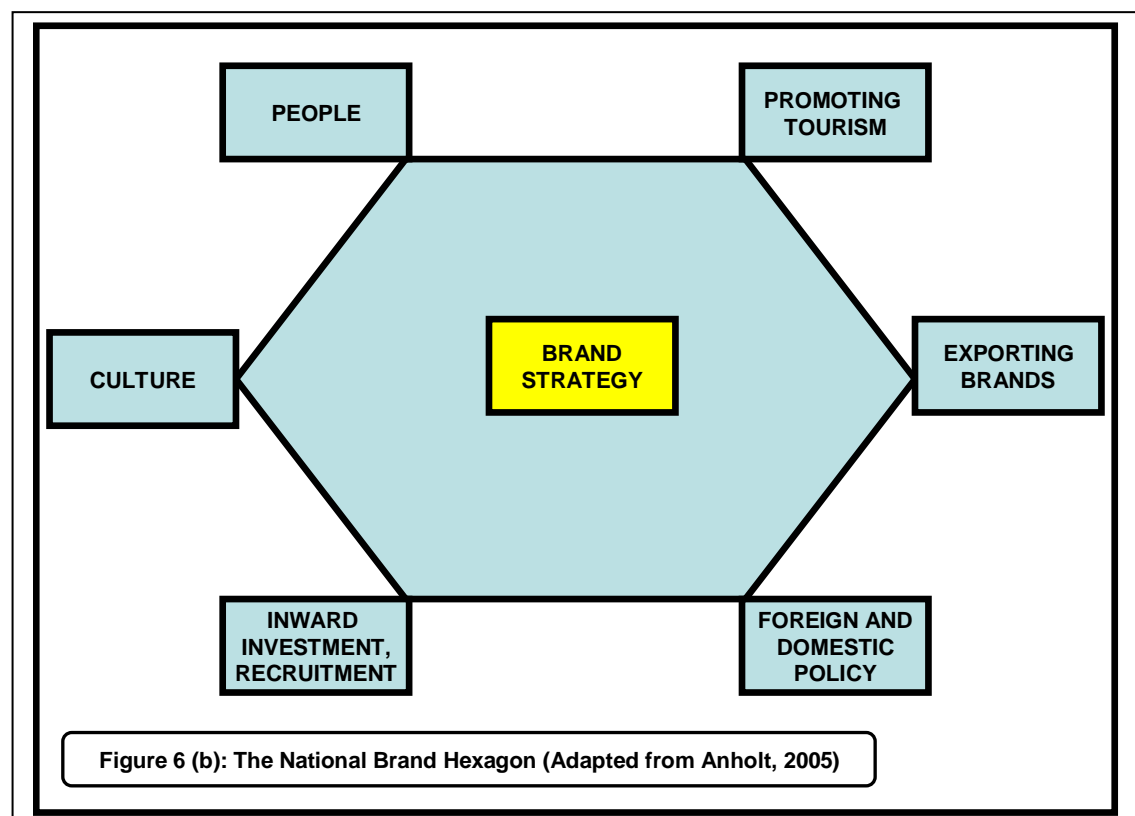
In Brand New Justice, Anholt contends that "A nation-brand is like the proverbial supertanker, which takes five miles to change course and eight miles to stop" (2005: Page 116). In other words, due to its sheer size a tanker at sea does not immediately come to a halt or change its direction at sea when the captain applies his brakes or steers it towards a new direction. On the contrary it is likely to carry on in its original direction for a few more miles before it adopts the new direction towards which the captain would have steered it. This figurative statement undoubtedly affirms the fact that changing the overall image of a country such as Zimbabwe, (symbolised by the supertanker) is not a simple task. Anholt (2005) goes on to say that what a country's stakeholders can realistically embark on is a strategy where on one hand they identify and isolate existing negative perceptions of the country that downplay its image, whilst on the other hand drawing out and harping on the positive truths. Anholt further reiterates that "the country is competing for consumer attention alongside a million other phenomena in the media, and unless its every appearance in the public domain continually and accurately reinforces a few simple, coherent and compelling truths, it is highly unlikely that a clear image will ever form itself in the consumer's mind" (Anholt,2005: Page 117).

CHAPTER FOUR

4.0 RESEARCH METHODOLOGY

Research will begin with desktop research to determine existing perceptions of Zimbabwe amongst its stakeholders. This will be followed by an exploratory research which will be conducted through a quantitative and qualitative study. Interviews, focus groups and questionnaires will be undertaken as detailed in appendix 3. Feedback from these interviews, focus groups and questionnaires will form the primary data of this study.

Qualitative

(a) In-depth Interviews will be carried out with embassy officials of foreign governments who are based Zimbabwe focusing on propositions P_1 to P_3 inclusive.

(b) Focus groups will be conducted amongst opinion leaders in both the government and private sector focusing on propositions P_1 to P_3 inclusive.

Quantitative Questionnaires

Respondents will be asked to rate each statement from "Strongly agree" to "Strongly disagree". In order to get a clear picture of these results each statement will be re-coded as follows: -

Statement	Score
Strongly agree	2
Agree	1
Neither agree or disagree	0
Disagree	-1
Strongly disagree	-2

(a) A questionnaire focusing on propositions P_1 to P_3 inclusive will be distributed to Zimbabweans including those in the Diaspora.

(b) A questionnaire focusing on propositions P_1 to P_3 inclusive will be distributed to tour operators/ travel agents.

(c) A questionnaire focusing on propositions P_1 to P_3 inclusive will be distributed to the media.

RESPONDENT SELECTION

Respondents will be drawn from the following stakeholder groups:-

Internal groups

(a) Government - The Zimbabwe government as represented by the Ministries of Tourism, Foreign Affaires and International Trade and Commerce;

(b) Parastatals - Notable Zimbabwe Tourism Authority (ZTA) the country's tourism arm in government; Air Zimbabwe, the national airline;

(c) Private Sector - Zimbabwe's private sector including Zimbabwe Council for Tourism (ZCT); Zimbabwe Chamber of Commerce and Industries (ZCCI);

(d) Zimbabweans – Those living in Zimbabwe

External groups

(a) Governments of key source markets (both traditional and emerging markets) represented by their embassies in Zimbabwe

(b) Tour operators

(c) Zimbabweans in the Diaspora

Media

(a) Zimbabwe's media

(b) Media based in Zimbabwe, as foreign correspondents for media outside Zimbabwe (Reuters and SABC).

CHAPTER FIVE
5.0 RESEARCH RESULTS

The research was conducted through 5 instruments as follows:-

(1) Measurement Instrument 1 (Qualitative) - Interviews

One on one interviews were held with embassy officials[2]. In this case the discussion guidelines, made up of five questions (please see Appendix 3) were sent to the interviewees at least 3 days before the actual interview. Interviews initially pencilled in for 45 minutes went on for at least one hour and thirty minutes and at most three hours.

(2) Measurement Instrument 2 (Qualitative) – Focus groups

Two focus groups were conducted.

(3) Measurement Instrument 3 (Quantitative) - Questionnaire

This was a questionnaire for Zimbabwean respondents living in Zimbabwe as well as those living in the Diaspora. The sampling frame consists of 30 Zimbabweans. 100 questionnaires were distributed by e-mail and by hand, 30 were returned.

(4) Measurement Instrument 4 (Quantitative) - Questionnaire

This was a questionnaire for international tour operators. The sampling frame consists of twenty (20) tour operators. Eighty (80) questionnaires were e-mailed to potential tour operator respondents and twenty (20) were returned.

(5) Measurement Instrument 5 (Quantitative) - Questionnaire

This was a questionnaire for both the local and international media. Twenty (20) questionnaires were sent out and seven (7) were returned to the researcher.

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[2] *Interviewees stressed that the views expressed during the interview were their own to assist the researcher in her field work and should not be interpreted to mean official views of their home governments.*

The guiding propositions for all the five measurement instruments were propositions 1 to 3 inclusive as indicated below:-

P₁   (a) A country's image may shift slowly over time or quickly as a result of intervening events (e.g. hosting of Olympics in the case of Spain; Hosting of Ms Tourism World in the case of Zimbabwe)

(b) A country's stakeholders can actively reposition the image of their nation.

(Source of proposition: Kotler, Haider & Rein, 1993; Gilmore 2002)

P₂   Country political dynamics have a significant bearing on the brand equity of a country especially the Commonwealth withdrawal, the controversial land reform and others in the case of Zimbabwe.

(Source of proposition: Kotler, Haider & Rein, 1993; Gilmore, 2002; Anholt, 2003 & 2005)

P₃   Media reports can make or break a country's image.

(Source of proposition: Kotler, Haider & Rein, 1993; Gilmore, 2002; Anholt, 2003 & 2005)

(1) Findings through Measurement Instrument 1 - Interviews

It occurred to the researcher when field work commenced that what had been assumed to be a marketing oriented topic could not be tackled without venturing into the world of politics. One interviewee commented that the topic was actually more political than marketing orientated.   In this regard, and bearing in mind the Public Order and Security Act (POSA) of 2004, one of the acts of the Zimbabwean law that gives enforcement agents the mandate to place perceived offenders in custody for up to 21 days before trial, respondents opted to comment on a personal basis in strict confidence and not at official level. It is therefore important to note that the views expressed in this study are those of individuals who were interviewed and not official comments of their home countries. To safeguard confidentiality, no embassy officials and embassies or foreign missions to Zimbabwe will be referred to by name. To differentiate between embassies, the terms African Embassies and Non-African Embassies will be used for the purposes of this study. The terms "respondent" and "interviewee" will be used interchangeably and are understood to have the same meaning by the researcher.

A total of 5 individual interviews (with 3 males and 2 females, all black respondents) were conducted with interviewees from African Embassies, whilst a total of 3 individual interviews (with 2 females and 1 male, all white respondents) were conducted with interviewees from Non-African Embassies. Interviewees from African Embassies accounted for 62.5% of total respondents in this category, whilst interviewees from Non-African Embassies accounted for 37.5% of total respondents.

EMBASSY RESPONDENTS BY ORIGIN

Non-African Embassies 38%

African Embassies 62%

☐ African Embassies ■ Non-African Embassies
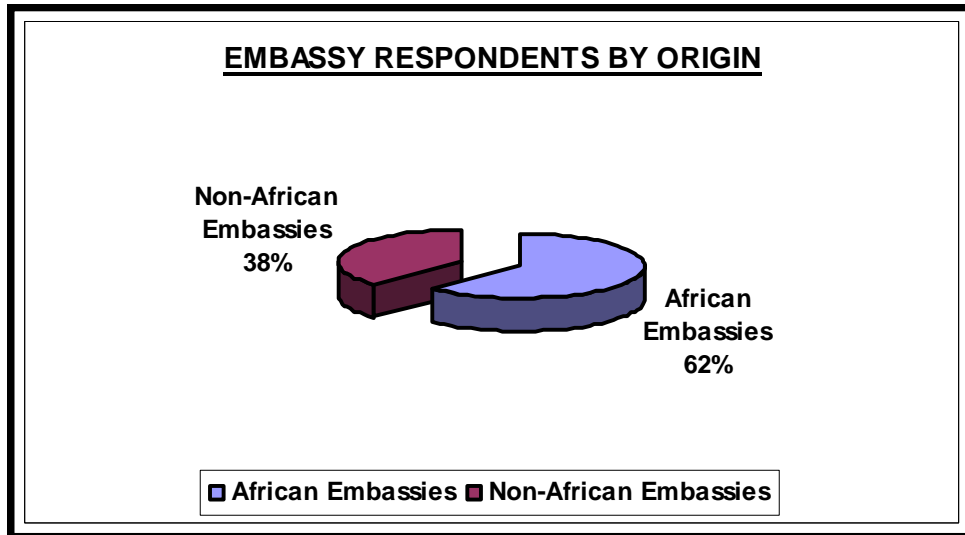
Figure 7: Embassy Respondents by Origin

EMBASSY RESPONDENTS KEY DEMOGRAPHICS

Female 50%

Male 50%

☐ Male ■ Female
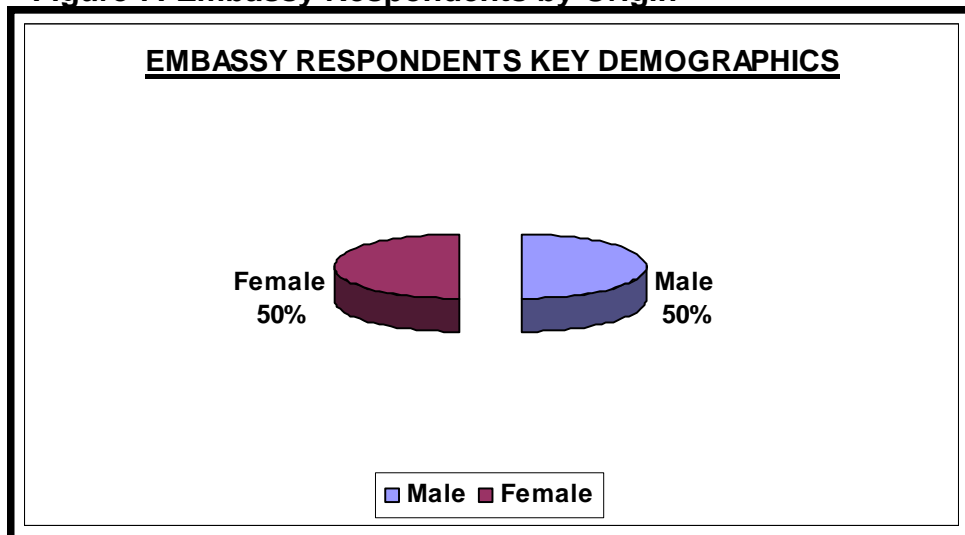
Figure 8: Embassy Respondents by Gender

EMBASSY RESPONDENTS BY KEY DEMOGRAPHICS

White 38%

Black 62%

☐ Black ■ White
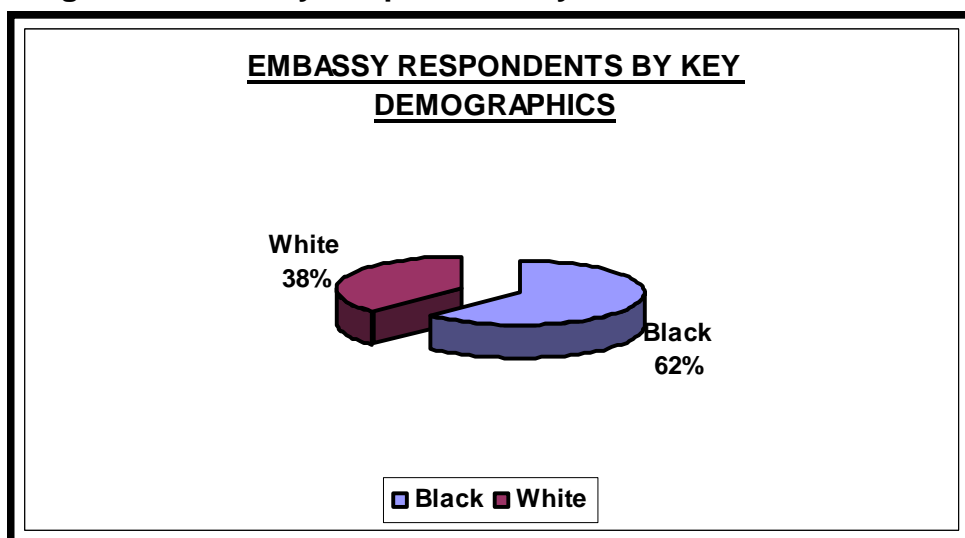
Figure 9: Embassy Respondents by Race

Respondents from African Embassies tended to be more at ease when discussing the image of Zimbabwe as they perceived it, as well as offer their views in terms of what they believed needed to be done if the country was to change its image for the better, compared to their counter-parts from the Non-African Embassies. Although none of the African Embassies have travel warnings against Zimbabwe (As a matter of fact no African country has ever had travel warnings against Zimbabwe), embassy officials were quick to share their views on why Non-African embassies had these travel warnings against Zimbabwe.

Answers to questions asked:

When one says Brazil, what is the first thing that comes to your mind? What is the first thing that crosses your mind when the name Zimbabwe is mentioned?

Interviewees pointed out that when Brazil was mentioned the first thing that crossed their minds was either football or the Samba dance. It was interesting to note that it was the male interviewees from both the African and Non-African Embassies (50% of total respondents) that pointed out football, whilst the female interviewees from both African and Non-African Embassies (50% of total respondents) pointed out the samba dance. Throughout the interviews the researcher noted that respondents tended to get "emotionally involved" in the topic under discussion. This phenomenon was prevalent in both African and Non-African embassy respondents. When interviewees were discussing Brazil, the researcher noted that respondents had what the researcher will term "high positive warm energy" when they were making these comments (e.g. laughter, gesturing, smiles, spoke loudly; body language was open and

inviting e.g. arms not folded, legs not crossed; comfortable and relaxed sitting posture). That is, although they were emotionally involved, their expressions, and articulations were positive. On the contrary, when the second part of the question was asked, i.e. *"What is the first thing that crosses your mind when the name Zimbabwe is mentioned?"* the researcher noted a sudden change in facial expressions, non-verbal body language and tone of voice. If the first part of the question could be said to generate "high positive, warm energy", the second part of the question ignited what the researcher will term "high negative, cold energy" (e.g. no laughter, no smiles, cold exterior; gestures included folded arms where previously the respondent had unfolded arms. Sitting posture changed from relaxed to formal. Body language was clearly defensive and uninviting). However, all respondents eventually relaxed during the course of the interview. It is worth noting that when the researcher embarked on the interviews, observing body language was not intended to form part of the research findings. However, as the researcher moved from interview to interview, it was impossible to ignore the body language and the fact that it carried some form of message.

Comments advanced by the interviewees in terms of what came to mind when Zimbabwe was mentioned were not as spontaneous as in the case of Brazil. Comments like "The Victoria Falls; Warm people; your tourist resorts; Friendly people" always came after a pause and deep pondering. One male interviewee from an African Embassy expressed his views as follows:-

" When the name Zimbabwe is mentioned, under normal circumstances one should think of the Victoria Falls. However these are not normal times in your

country, and to tell you the truth, it is no longer the Victoria Falls that crosses one's mind when Zimbabwe is mentioned, but rather a myriad of issues which are more political than social in nature. Therefore if you think you can talk about branding Zimbabwe by simply concentrating on marketing and tourism issues, and sidelining the political, you are joking!"

Throughout these interviews the researcher noted that the image of Zimbabwe that is currently being seen is not of the physical attributes of the country, but rather that of a political nature. Respondents highlighted that the negative image currently dogging Zimbabwe first came about as a result of the country embarking on the land reform programme and consequently the withdrawal from the Common Wealth grouping. The recent "Operation Restore Order" was seen as simply adding to the country's already existing image woes.

Travel warnings issued against Zimbabwe

As alluded to earlier in the report, none of the 5 African Embassies interviewed have travel warnings against Zimbabwe. On the other hand governments of all 3 Non-African Embassies interviewed had issued travel warnings against Zimbabwe. The researcher was referred to the official travel warnings for more information. Ironically, the respondents from the African Embassies were keen to explain to the researcher why these countries had travel warnings against Zimbabwe. It was highlighted to the researcher that travel warnings generally focused on issues relating to Human rights, tourist safety, shortages of basic commodities (food, fuel and power supplies) and health issues.

Following is a summary of the perceived reasons for issuing travel warnings:-

1. Perceived human rights violations

Acts like the Access to Information and Protection of Privacy Act (AIPPA) and the Public Order Security Act (POSA) were interpreted to mean that law enforcement agents can act with impunity if the tourists find themselves on the wrong side of the Zimbabwean law.

2. Tourist Safety - Tourists from countries such as the USA and UK whose leaders were perceived to be at loggerheads with the Zimbabwe leadership felt "unsafe" by coming to a country that "did not want them" as evidenced by the "hate speech" emanating from the country's leadership.

3. Shortages of basic commodities

The shortage or erratic supply of basic commodities including fuel and load shedding of electricity due to foreign currency inflow challenges facing Zimbabwe at the moment, might also mean that a tourist could find himself/ herself unable to enjoy his or her holiday due to the unavailability of basic commodities. In the event of falling ill and needing urgent medical attention, tourists could neither be guaranteed availability of critical medication nor the fact that they would be attended to by qualified personnel (due to skills flight facing the country's health sector).

Measures the Zimbabwe government would need to put in place to attract Foreign Direct Investment (FDI)

Without exception all respondents highlighted the same measures as needing to be in place if Zimbabwe was to attract FDI. These measures are as follows:-

1. Regain respect in the eyes of key world bodies such as the IMF.

In early September Zimbabwe, already listed in "Category D of Country Risk", found itself black listed as an errant country that was not meeting its obligations to the IMF. The IMF Executive Board decided to postpone by six months a recommendation to the IMF's Board of Governors with respect to the compulsory withdrawal from the IMF of Zimbabwe. This decision provides Zimbabwe with an opportunity to strengthen its cooperation with the IMF in terms of economic policies and payments. As of September 2005, Zimbabwe's arrears to the IMF amounted to US$ 175 million, approximately 34% of its quota in the IMF. Compulsory withdrawal is the last step in a series of escalating measures that the IMF applies to members that default in meeting their obligations.

2. Strong macroeconomic policies

Interviewees stressed that there was an urgent need for the government to undertake strong macroeconomic policies, to halt economic and social conditions from deteriorating further in the country.

3. Adopt and implement a comprehensive and coherent adjustment programme

Interviewees emphasised that the government of Zimbabwe had to urgently adopt and implement a comprehensive and coherent adjustment programme in the areas of fiscal, monetary and exchange rate policies and structural reforms.

4. Social Safety Nets/ Food Security for Vulnerable Groups

Provide adequate social safety nets and food security for vulnerable groups, including those affected by "Operation Restore Order" and HIV/ AIDS.

5. Respect rule of law

Outsiders generally believe that the Zimbabwe government has no respect for the rule of law. Examples of farms "seized from rightful owners" were given. Whilst the redistribution of land to the landless majority was seen as a noble course, respondents highlighted that the manner in which the exercise was carried out left affected parties with no room for recourse as they could not turn to the law to protect them.

6. Property rights

Respondents highlighted that Zimbabwe is seen as a country with no property rights. In this respect potential investors were weary about investing in the country as it was perceived to be high risk. A potential investor had no assurance that his property rights would be safeguarded in the event that such a need arose.

Measures the Zimbabwe government would need to put in place to attract tourist visitors

1.Tourists home governments' stance determines where they go on holiday ("Follow the Flag" mentality)

Respondents pointed out that policies of the tourists' home governments tended to determine where they went on holiday. One hundred percent (100%) of the respondents indicated that they too would "follow their home flag" if they had to make decisions. For example, respondents stressed that if their home governments issued travel warnings to destinations, it was unlikely that they or other tourists from these countries would defy their home governments. Respondents from the Non-African Embassies indicated that it was important for the Zimbabwe government to "normalise" its relations with the western world if tourists from these parts of the world were to be attracted. It was stressed that "political rhetoric" and "hate speech" emanating from the Zimbabwe leadership, whether justified or not, needed to be halted as this is all that potential tourists were seeing in the media, and interpreted it as a sign that they were not wanted in Zimbabwe.

2.   Moral issues in determining how tourists spend their money

A respondent from one of the African Embassies highlighted that black nationals from his country would not have any problem with visiting Zimbabwe as tourists as they empathised with the stance taken by the Zimbabwe government in expropriating land for the landless majority. On the other hand, white nationals of the same country would not choose Zimbabwe as a tourist

destination as they believed that the rights of the previous white farmers had been violated when their land was taken from them. Respondents also highlighted that tourists believed that the money they spent in the country would go towards enriching the lives of the leadership who cared little for their own people and gave the "Operation Restore Order" (an operation that was carried out to eradicate slums and unregistered dwellings that left many Zimbabweans homeless) as an example. It is worth noting that despite the views or facts that the government had tried to make to justify its actions, respondents still had perceptions of their own.

3. Property rights

Respondents from all the embassies highlighted that the lack of respect for property rights which has started on farms also affected game parks and left tourists concerned about coming to Zimbabwe on holiday. These issues had to be resolved first if tourists were to be attracted back to Zimbabwe.

4. Media

Despite the fact that the researcher had not initially put the role of the media in determining a country's image as a topic for discussion with embassy officials, all respondents voluntarily commented on the subject. Without exception, all interviewees highlighted that the image of Zimbabwe had been "blown out of proportion" by the international media, and that what one saw in the media was not the reality on the ground. Respondents from the African Embassies (63% of total respondents) highlighted that it was a "political game" as these international media houses had agendas to front. The British Broadcasting

Corporation (BBC) and Cable News Network (CNN) were singled out as media houses that had to "fly the flag of their countries" and were thus fronting the agendas of their home governments by taking a stance in their reporting angle. Respondents were quick to hasten that despite this "fact", Zimbabwe was its own worst enemy in sculpturing the image that the media had blown out of proportion, as the country's authorities never ceased to outdo themselves with controversy in the face of the international media – The "Controversial land reform programme" was said to have been the debut of the fall of the country's image from previous glory, followed by Zimbabwe's withdrawal from the Common Wealth. Most recently the country's authorities embarked on the "Operation Restore Order" which was aimed at eradicating slumps in urban areas. Respondents from the African Embassies also highlighted that despite the fact that their governments did not have travel warnings against Zimbabwe; the country was not a popular option amongst their nationals whose views had been influenced by the international or western media.

Respondents also commented on the media in Zimbabwe. According to the 2005 report from the Committee to Protect Journalists (CPJ) at least 90 Zimbabwean journalists now live in exile in South Africa, other African nations, the United States and the United Kingdom, making it one of the largest groups of exiled journalists in the world. During the study, embassy officials pointed out that the country's media laws were perceived to be retrogressive and stifling freedom of the press. Examples of the *Daily News* paper an independent daily that was closed down was given, as well as recent reports

that alleged that the independent weekly paper, *The Financial Gazette* and *the Daily Mirror* were in fact owned by key individuals in the government as well as the state's secret services agency, the Central Intelligence Organisation (CIO). Respondents from the African Embassies indicated that baring of international journalists such as those from the BBC from operating in Zimbabwe, was perceived to be a sign that perhaps the authorities had something to hide, and helped to "fuel" the journalists obsession to report on Zimbabwe, albeit incorrectly or from a misinformed angle.

Zimbabwe's image in the next few years

One hundred percent (100%) of respondents interviewed indicated that the image of Zimbabwe on the international scene would turn for the better with time as the country had most of the "ingredients" to make it – e.g. although the country's infrastructure was said to be deteriorating, it was said to be one of the best in Africa, in fact second after South Africa. Respondents were optimistic that Zimbabwe's infrastructure could still be saved and improved upon. Zimbabwe with a literacy rate of over 70% was seen as a country that has a capable resource in its people who have the skills and will power to take their country to greater heights. Despite its challenges, it was seen as a positive factor by embassy officials that the country had not degenerated into a battle field or civil war, and peace continued to prevail. Respondents commented that this was a major plus for the country's future economic and social turnaround. In addition to the above, Zimbabwe is blessed with rich natural resources, which will give the country a suitable launch pad to recovery.

However the two year outlook period paused by the researcher, was seen as too short a period of time for any meaningful changes to the country's image. Respondents highlighted that if all stakeholders and especially the country's leadership, were committed to meaningful macro-economic and social reforms, the country's image would change for the better in at least five years from now.

(2) Findings through Measurement Instrument 2 – Focus groups

Two focus groups were held as follows:-

- Focus Group One - Private Sector – Will be referred to as **Group One** in this study.

  6 participants (4 females/ 2 males; 2 white/ 4 black)

- Focus Group Two - Public Sector – Will be referred to as **Group Two** in this study.

  6 participants (5 males/ 1 female; all black)

Observations made in participants due to demographics

No distinct differences or similarities were observed by the researcher during the focus groups which could be attributed to the differences in gender, age or race amongst participants. However the researcher did observe a great degree of enthusiasm and commitment from the participants. Despite the fact that the focus groups were held over a weekend, participants came willingly and gave up precious time and their tight schedules to accommodate the researcher.

In spite of the fact that the two focus groups were drawn from two distinct backgrounds, similarities in opinions and thought process emerged on topical issues. For this reason, findings from both groups have been aggregated. Where distinct comments emerged, these will be pointed out. It must be highlighted that in some instances the original questions (as they appear in

Appendix 3) were changed to facilitate dialogue amongst the participants in the focus groups.

Question 1 - What is the "Ten Point" plan?

Participants from Group One did not know what the "Ten point plan" was whilst those from Group Two explained it without difficulty as the Macro – Economic Policy Framework document outlining ten areas of focus, drawn up as a guideline for implementing economic recovery in all the country's key sectors by the Ministry of Finance as well as other key players in the tripartite (i.e. Government, Labour and Industry).

Citation 1 – "The country has experienced capital flight and dwindling foreign investment due to sanctions and the perceived country's political and economic risk factors. This has significantly reduced inflows of foreign exchange, which has led to a reduction in capacity and overall economic decline". (Macro-Economic Policy Framework: page 83)

Question 2: What measures have been put in place or need to be put in place to redress these challenges?

Both focus groups highlighted that no meaningful measures had been put in place. It was pointed out that the country's "limping economy" had been worsened by foreign currency, fuel and food shortages. Foreign currency shortages were said to have hamstrung industry, plunging production levels to below 30%. Participants indicated that few investors if any saw Zimbabwe as a country worth investing in. The economic environment was perceived to be a very strong repellent to any potential investors. The ongoing hyperinflation, exacerbated by the reversal of the 2004 decline in inflation rates, despite the efforts of the governor of the Reserve Bank, massive scarcities of foreign

exchange (already alluded to) and, therefore, of manufacturing and other operational inputs, endless governmental regulation and threats of price controls and of punitive actions against those accused of creating product shortages, were cited by participants as major investment deterrents.

Citation 2 – " As part of the on-going efforts to improve the country's image, Government, together with its social partners, namely Labour and Business, will implement the **Kadoma Declaration**. *Each social partner will work out implementation modalities and position papers for presentation to the Tripartite Negotiating Forum".- (Macro-Economic Policy Framework: page 83)*

Question 3 – Please briefly explain what the *Kadoma Declaration* is and how you see this declaration changing the image of Zimbabwe?

Participants did not know what the Kadoma Declaration was and were therefore not able to comment on how they envisioned it changing the image of Zimbabwe. Participants from Group One (Private Sector) then brought in the notion of the branding exercise that the Zimbabwe Tourism Authority (ZTA) had embarked upon. Although participants expressed eagerness that such a project had been undertaken, there was concern that by only focusing on the "branding of the tourism product", ZTA was not addressing the crucial fact that it was the whole country's image that needed an overhaul, instead of just the tourism industry.

Citation 3 – "In line with the need for a well-managed Government information strategy, the Media will also be encouraged to be more objective and strive to acknowledge and promote positive initiates for the good of the country"- (Macro-Economic Policy Framework: page 83)

Question 4 – How best can the media (both local and international) be engaged as Zimbabwe tries to spruce up its image?

Participants from both groups indicated that the Public Order and Security Act (POSA) and Access to Information and Protection of Privacy Act (AIPPA) were perceived to be acts that violated the media's right of movement and freedom of speech. Recent press reports that alleged that the country's state security agency, the Central Intelligence Organisation (CIO), was seeking to emulate South Africa's apartheid-era information blitz by secretly taking over newspapers which until now were perceived to be independent of state control was pointed out as very disturbing by participants. With regards to the international media, regulations that barred some media houses from broadcasting from the country such as the British Broadcasting Corporation (BBC), and the restriction of international press from coming into the country through the compulsory accreditation process was seen as retrogressive as it encouraged journalists to "snoop" for stories and publicise stories without fully checking content for fact. Thus to engage the media, participants felt that relevant authorities had to foster an environment that encouraged the media to act openly and hopefully convert it from foe to friend. All participants believed that there was so much "good news' vis-à-vis the "bad news" that the media could focus on for the benefit of the country's image.

Citation 4 – It is imperative that there be a well co-coordinated and managed interface between Government in its collectivity and foreign agencies that allows for choreographed and timely responses to challenges facing the country. To this end there is a compelling need for the implementation in tandem, of Government policies

that impact on the foreign relations in view of the conjoined nature of Government operations" - (Macro-Economic Policy Framework: page 83)

Question 5 - How well has government and other stakeholders tackled the above?

Participants highlighted that stakeholders both in the public and private sector tended to be more reactive than proactive. It was highlighted that a coordinated Public Relations mouth piece for Zimbabwe did not exist. Examples of incidents that could have been better managed had the country's PR machinery been in place were the "Operation Restore Order" which the government embarked on in July 2005 and the culling of elephants in May 2005 which was interpreted as the "massacre of elephants by hungry Zimbabweans". In both cases there was no proactive stance taken beforehand to explain what was going to be done and why. In the aftermath of both incidents, press releases were not only uncoordinated but also turned out to be piecemeal, lacked depth and conviction resulting in the international press having a field day. Group One also pointed out that the various tourism attachés posted around the world did very little in terms of promoting Zimbabwe's agenda, including efforts in correcting the negative or misinformed press in the foreign markets in which they were stationed.

Question 6 - How are government initiatives in improving the image of the country being coordinated with those of the private sector?

Participants in both focus groups highlighted that the cooperation between government and the private sector was not at the level it should be at. The general feeling amongst participants was that there was a lot of room for improvement for the benefit of the country as a whole.

Citation 5 - "The International Marketing Council of South Africa was brought into being in August 2000 upon the realisation that it was absolutely imperative to create a positive and compelling brand image for South Africa. At the time, there were many messages entering the international arena. The messages were as varied as the source and, quite obviously, did very little for solid brand building. It was evident that a great need existed for a body able to co-ordinate the marketing initiatives in order to maximise their efficiency".

Question 7 - South Africa has put in place the IMC whose aim is to coordinate initiatives on country branding. Can Zimbabwe learn anything from South Africa?

Participants from both focus groups were in agreement that current efforts to promote Zimbabwe's image were many and lacked a coordinated approach. It was suggested that an approach such as that taken by South Africa when it formed the IMC was imperative and would only work if all key stakeholders gave it the necessary support.

Question 8 – Did the hosting of Ms Tourism World in February 2005 place us on the world map? Why?

In both focus groups participants indicated that though the Ms Tourism World was a noble project, the fact that it appeared to have been "conceived and delivered" within a 4 week period, meant that it had not been thought through before it was embarked upon and thus did not contribute meaningfully to changing the country's image on the international front. It was however felt that in future, if well planned a similar event would contribute to changing the country's image.

(3) Findings from Measurement Instrument 3 – Questionnaire for Zimbabweans

A total of 100 questionnaires each with 10 questions were sent out to Zimbabweans living in Zimbabwe as well as in the Diaspora. The questions were drawn up using Propositions (P_1, P_2, and P_3) as guidelines (please refer to page 45 of this research report for the detailed propositions). Out of the 100 questionnaires, a total of 30 were returned (30%) to the researcher. Findings will therefore be drawn from this sampling frame of 30 questionnaires.

Table 2 – illustrates the key demographics of the 30 Zimbabwean respondents.

	MALE	FEMALE	20-30YRS	31-40YRS	41-50YRS	51-60YRS	BLK	WHT	OTHER RACE
Total Zimbabweans	14	16	7	15	6	2	26	3	1
Resident in Diaspora	3	2	3	2	0	0	4	1	0
Resident in Zimbabwe	11	14	4	13	6	2	22	2	1

Table 2 – Demographics of Zimbabwean Respondents
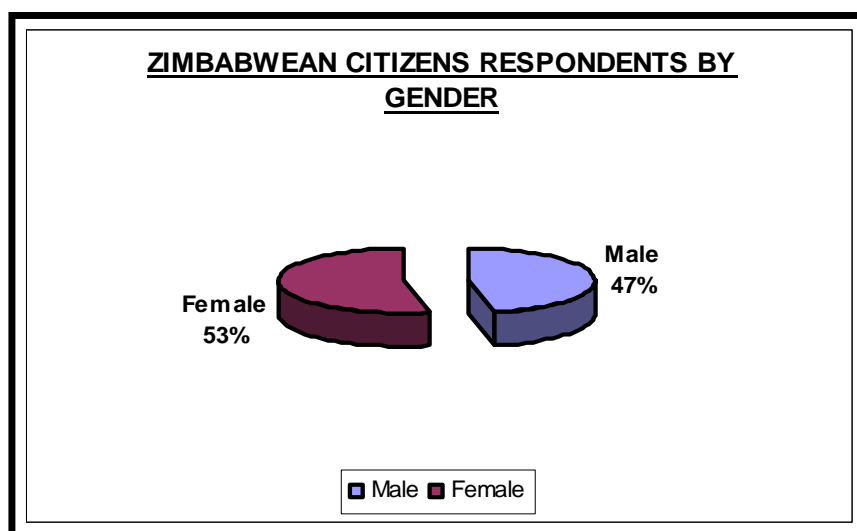
Figure 10: Overall Zimbabwean Respondents by Gender.

Of the total sample of respondents, 53% were female and 47% were male. Overall findings did no show any marked differences due to respondent gender.

ZIMBABWE CITIZENS, RESPONDENTS BY RACE
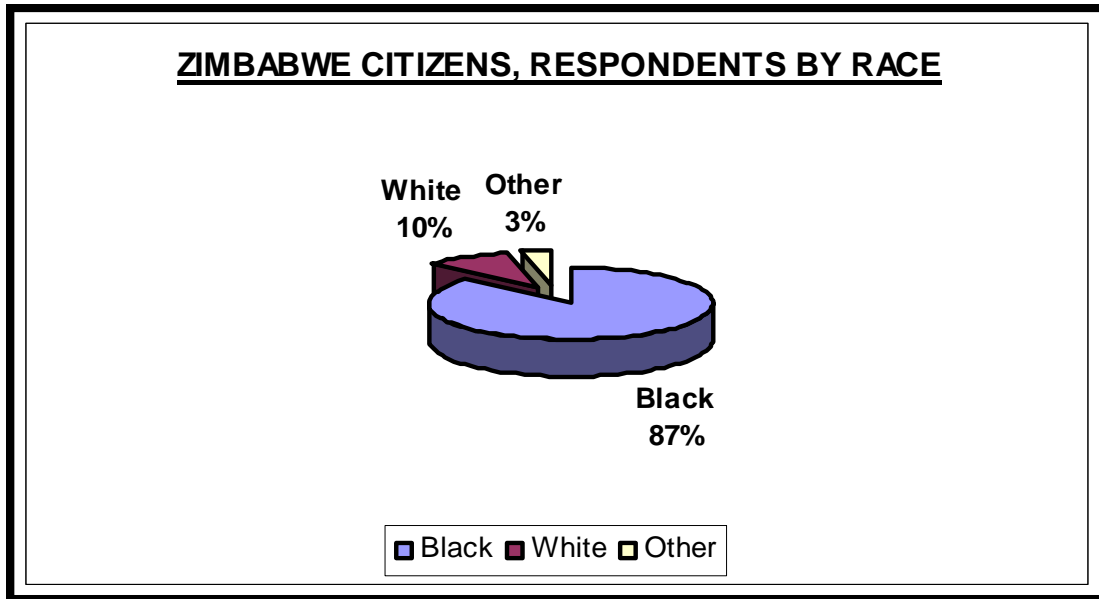
Figure 11: Overall Zimbabwean Respondents by Race.

Eighty seven percent (87%) of respondents were black, 10% white and 3 % were unclassified. Overall findings did not show any marked differences due to respondent race.

ZIMBABWEAN RESPONDENTS & CURRENT PLACE OF RESIDENCE
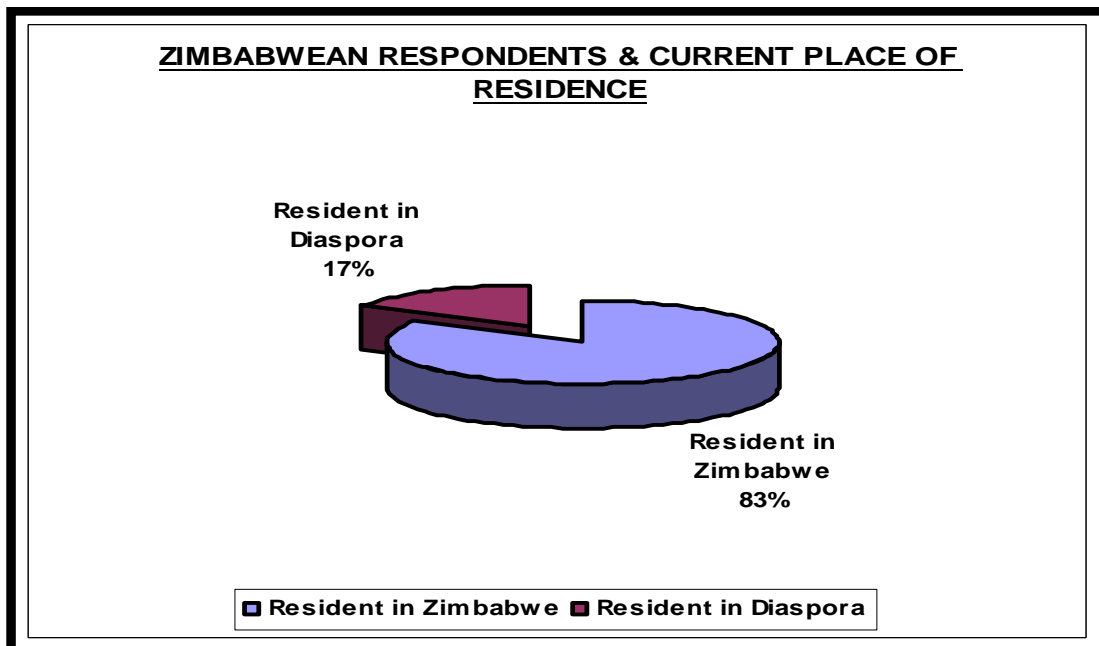
Figure 12: Respondents based in Zimbabwe vs. Respondents based in the Diaspora.

Seventeen percent (17%) of the respondents were Zimbabweans living in the Diaspora whilst 83% were Zimbabweans resident in Zimbabwe. Overall findings in some areas showed marked differences between respondents in Zimbabwe and those in the Diaspora (please see findings narrative).

ZIMBABWE CITIZENS BY AGE GROUP

51-60 Years
7%

41-50 Years
20%

20-30 Years
23%

31-40 Years
50%

☐ 20-30 Years ☐ 31-40 Years ☐ 41-50 Years ☐ 51-60 Years
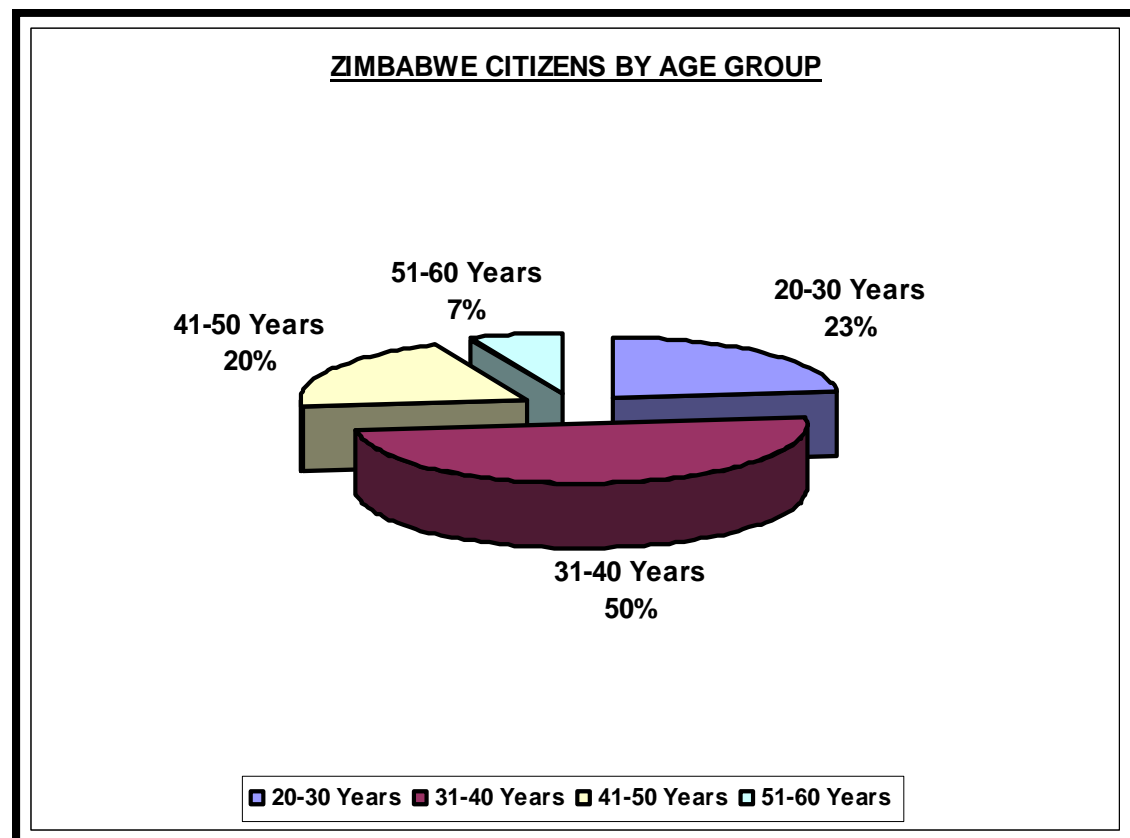
Figure 13: Zimbabwean Respondents by Age Group.

Fifty percent (50%) of respondents were of the age group 31-40 years; Twenty three percent (23%) were of the age group 20-30 years; Twenty percent (20%) were the age group 41-50 years; Seven percent (7%) were of the age group 51-60 years. Overall findings did not show any marked differences due to respondent age groups.

ZIMBABWEANS IN THE DIASPORA

ZIMBABWEAN RESPONDENTS IN THE DIASPORA (BY RACE)

White
20%

Black
80%

◻ Black ◼ White
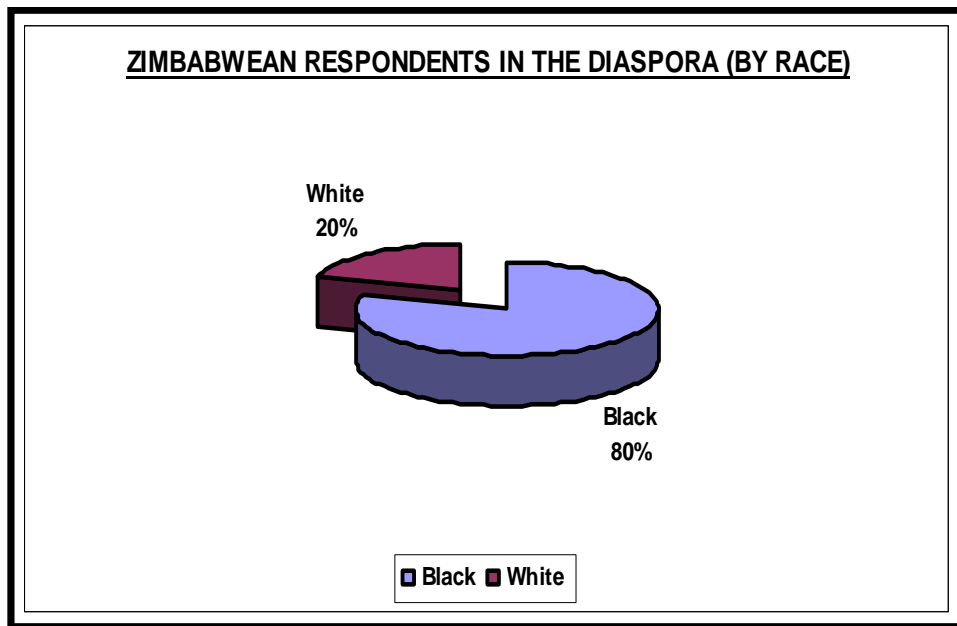
Figure 14: Zimbabwean Respondents in the Diaspora, by Race.

Twenty percent (20%) of the respondents in the Diaspora were white, with 80% of respondents being black. Overall findings did not show any marked differences between these two respondent groups due to race.

ZIMBABWEAN RESPONDENTS IN THE DIASPORA (BY GENDER)

Female
40%
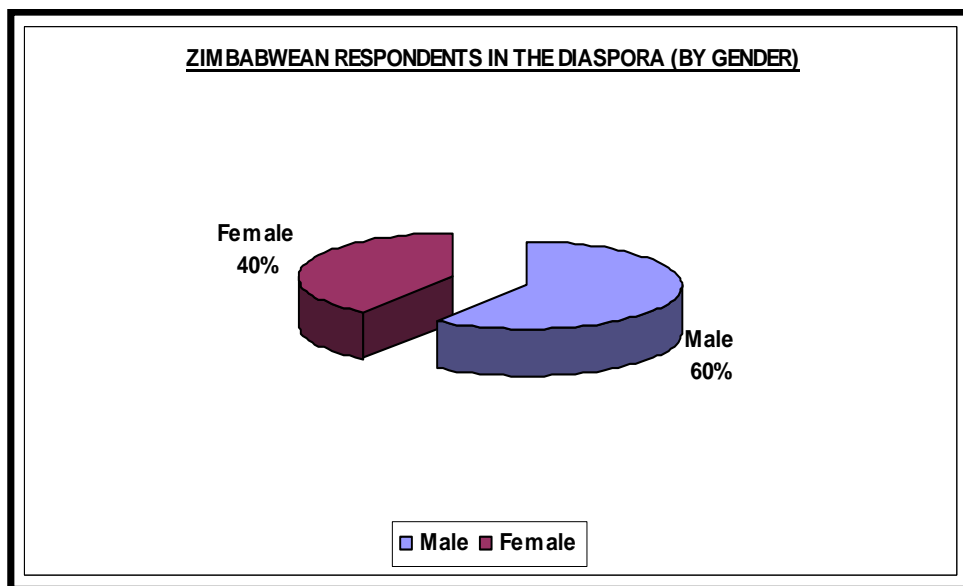
Male
60%

◻ Male ◼ Female

Figure 15: Zimbabwean Respondents in the Diaspora, by Gender.

Forty percent (40%) of the respondents in the Diaspora were female vis-à-vis 60% male respondents. Overall findings did not show any marked differences between these two respondent groups due to gender.
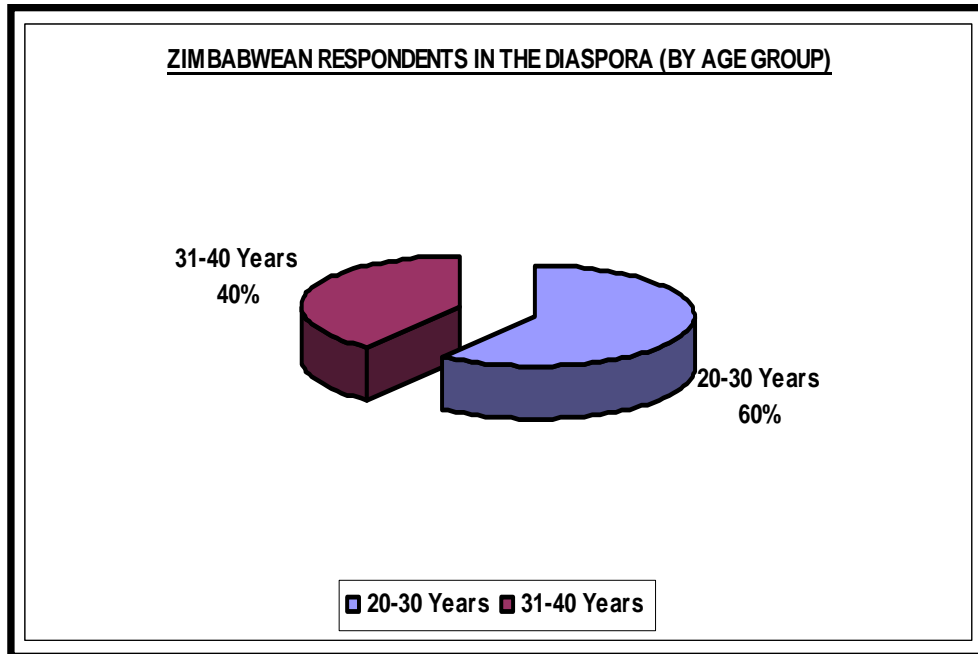
Figure 16: Zimbabwean Respondents in the Diaspora, by Age Group.

Whilst the main sample shows 4 main age groups amongst the respondents, only two distinct age groups (20-30 years and 31-40 years) emerge in the sub sample of respondents in the Diaspora.

Findings from the questions posed to respondents.

1.   *As a Zimbabwean I can influence the way Zimbabwe is viewed by other citizens of the world through my personal opinion on how I view the country.*

        (Guiding proposition for this statement: P$_{1b}$)

        Twenty-one 21 respondents (70%) strongly agreed that they could influence the way that Zimbabwe is viewed by other citizens of the

world. Six (6) respondents (20%) agreed with the statement. Two (2) respondents (6.67%) disagreed with the statement. One respondent (3.33%) neither agreed nor disagreed with the statement. In conclusion 90% of total respondents (including 100% of the respondents from the Diaspora) believed that their personal views had a bearing on the country's overall image.

2. *When I travel outside Zimbabwe, I believe that people tend to "look down" on me when I mention that I am Zimbabwean.*

    (Guiding proposition for this statement: P$_{1b}$)

    Four (4) respondents (13.33%) strongly disagreed with the statement. Eight (8) respondents (26.67%) disagreed. Five (5) respondents (16.67%) neither agreed nor disagreed. Nine (9) respondents (30%) agreed with the statement, whilst 4 respondents (13.33%) strongly agreed. Findings from the Zimbabweans in the Diaspora were that 80% of the respondents believed that they were looked down upon compared to 20% who strongly disagreed.

    Overall findings from this study were therefore that the majority of respondents (43.33%) felt that they were looked down upon by other nationals.

3. *Given the chance, I would change my citizenship from being Zimbabwean to another nationality of my choice.*

    (Guiding proposition for this statement: P$_{1b}$)

Gilmore stresses that for any country branding strategy to work, its own citizens must be proud citizens of that country.

Fifteen (15) respondents (50%) strongly disagreed with the above statement. Eight (8) respondents (26.67%) disagreed. Two respondents (6.67%) neither agreed nor disagreed. One respondent (3.33%) agreed, whilst 4 respondents (13.33%) strongly agreed with the statement. Sixty percent (60%) of Zimbabweans in the Diaspora indicated that they would not change their citizenship, whilst 20% showed a willingness to do so and a further 20% were undecided. Overall findings from this study were therefore that despite the current challenges facing their country, the majority of Zimbabweans (76.67%) would not change their citizenship, against 16.66% who were prepared to do so. It is interesting to compare the results of question 2 with those of question 3. Findings indicate that although Zimbabweans might feel that they are "looked down upon" when they travel outside their home country; they are still not willing to give up their citizenship.

4. *The best opportunities for Zimbabweans are found in Zimbabwe.* **(Guiding proposition for this statement: P$_{1b}$)**

Three (3) respondents (10%) strongly disagreed that the best opportunities for Zimbabweans were in Zimbabwe, whilst 11 respondents (36.67%) disagreed. On the other hand 3 respondents (10%) agreed whilst 7 (23.33%) respondents strongly agreed. The majority of the Zimbabweans in the Diaspora (80%) disagreed that the best opportunities for Zimbabweans were found in Zimbabwe. Only

20% of the respondent sample from the Diaspora was undecided. In summary 46.67% of total Zimbabweans did not agree that the best opportunities for Zimbabweans were in Zimbabwe against 43.33% who believed that they were. It is important to note that 80% of Zimbabweans in the Diaspora believed that the best opportunities were not in Zimbabwe. These findings are disturbing in light of the brain drain statistics currently facing Zimbabwe. According to a study carried out in March 2005 by the International Organisation for Migration (IOM) approximately 3.5 million Zimbabweans (close to 25% of country's population) live and work outside the country. What is encouraging though is that the majority (94%) still maintain links with their families in Zimbabwe, and it is therefore assumed that there is a likelihood of them returning in the future should conditions in the country change for the better.

5. *Zimbabweans must look beyond Zimbabwe for better opportunities.* **(Guiding proposition for this statement: P$_{1b}$)**

Three respondents (10%) strongly agreed with the above statement, whilst 6 respondents (20%) agreed. On the other hand, 3 respondents (10%) strongly disagreed, whilst 9 respondents (30%) disagreed. Nine respondents (30%) were undecided. Of the Zimbabweans in the Diaspora, 40% agreed with the statement, whilst 40% disagreed and the remaining 20% was undecided. On the whole 30% of all Zimbabweans agreed that Zimbabweans must look beyond Zimbabwe

for better opportunities against 40% who disagreed and the remaining 30% were undecided at the time of the study.

6. *My individual expressions about Zimbabwe have a bearing on the overall image of the country.*

    (Guiding proposition for this statement: P$_{1b}$)

    Forty seven percent (46.67%) of total respondents (i.e. 14 respondents) strongly agreed with the above statement, whilst 36.67% (11 respondents) agreed with the statement. On the other hand, 3.33% (1 respondent) disagreed and an equal percentage strongly disagreed (3.33% - 1 respondent). 10% of respondents were not sure. Regarding the Diaspora sample 80% of respondents agreed with the statement whilst 20% were uncertain. On the whole 83.34% of all the respondents agreed that their individual expressions about Zimbabwe had a bearing on the overall image of the country, against only 6.66% who disagreed.

7. *Zimbabwe's image on the global arena has been permanently tarnished and nothing can be done to change this.*

    (Guiding propositions for this statement: P$_1$; P$_2$; P$_3$)

    Forty seven percent (46.67% ; 14 respondents) strongly disagreed with the above statement. 43.33% (13 respondents) disagreed with the above statement. An equal percentage of 3.33% (representative of one respondent in each case) agreed, strongly agreed and was uncertain respectively. Respondents from the Diaspora were in strong disagreement - 20%; disagreement- 40%; uncertain, 20% and in

agreement 20%. In summary 90% of all Zimbabwean respondents did not agree that the country's image had been permanently tarnished and that nothing could be done about it; compared to 6.66% who believed that nothing could be done to restore the country's image.

8. *Zimbabwe's image can be changed for the better, if government, the private sector and ordinary Zimbabweans work together.*

(Guiding propositions for this statement: P$_1$; P$_2$)

One hundred percent (100%) of respondents from the Diaspora were in agreement with the above statement (80% in strong agreement; 20% in agreement) 70% of total respondents (21 respondents) strongly agreed and 23.33% (7 respondents) agreed that Zimbabwe's image could be changed for the better if all stakeholders worked together. 1 respondent (representative of 3.33%) strongly disagreed whilst an equal percentage was uncertain.

9. *Zimbabwe has both physical and human assets to make it one of the best destinations in the world.*

(Guiding propositions for this statement: P$_1$; P$_2$)

Eighty percent of total respondents (24 respondents) strongly agreed with the above statement, whilst the remaining 20% agreed. Amongst the respondents from the Diaspora, the same pattern emerged. In conclusion 100% of respondents concurred that Zimbabwe had both the physical and human assets to make it one of the best destinations in the world.

10. *The media can make or break a country's image.*

(Guiding proposition for this statement: P₃)

Sixty three percent (63.33%; 19 /30) of the respondents strongly agreed, whilst 30% (9/30) agreed that the media could make or break a country's image. Only 1 respondent (3.33%) was uncertain and an equal number strongly disagreed that the media could have such an impact on a country's image. 100% of the respondents from the Diaspora concurred that the media had an impact on the image of a country. In summary 93.33% of the total respondents agreed that the media could make or break a country's image against 3.33% who disagreed.

(4) Findings from Measurement Instrument 4 – Questionnaire for Tour Operators

A total of 80 questionnaires were distributed by e-mail to 80 international tour operators who sell Victoria Falls (on either the Zimbabwean or Zambian side) as a possible holiday destination. 20 questionnaires were returned to the researcher and will form the sampling frame for the purposes of this study. Although questionnaires were sent to 9 international countries (namely: Spain, France, Germany, Italy, UK, USA, Mexico, Russia and Argentina), respondent tour operators only came from 4 of these international source countries namely Mexico (1 respondent), USA (13 respondents), UK (5 respondents) and Argentina (1 respondent). The researcher assumes that the measurement instrument, a questionnaire in English, might have presented language challenges to potential respondents who did not understand English. It is worth noting that the bulk of Zimbabwe's tourist arrivals to the Victoria Falls holiday destination have traditionally came from the USA and the UK when the country's tourism industry performance was at its peak.
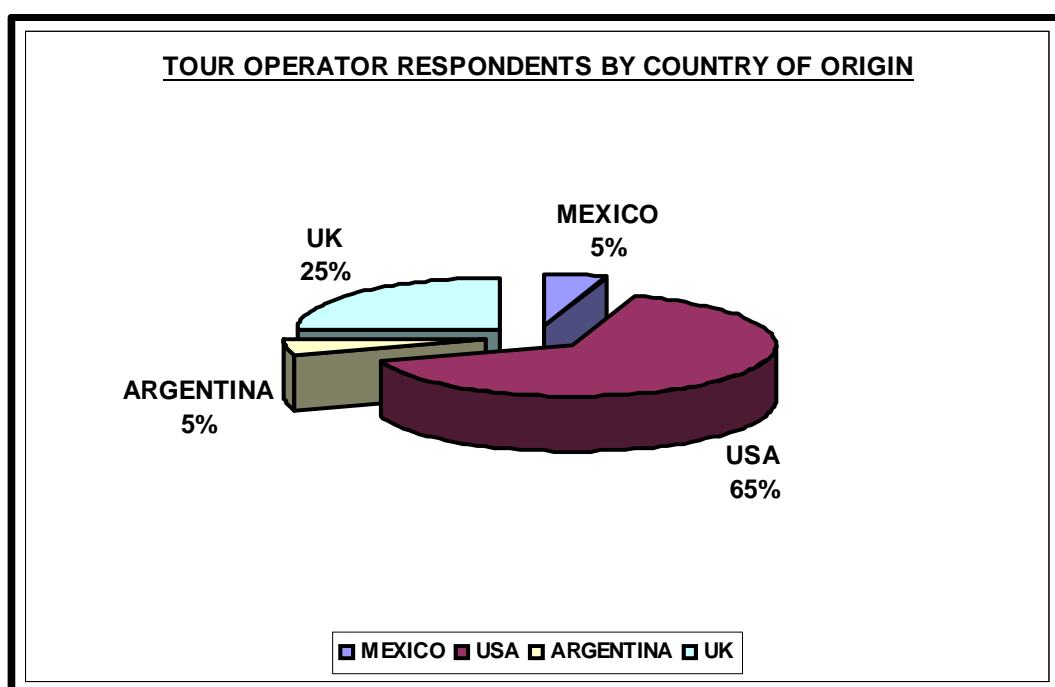
Figure 17: Tour Operator Respondents by Country of Origin

Sixty five percent of respondents came from the USA, 25% from the UK, 5% from Mexico and 5% from Argentina. No marked differences due to country of origin were noted amongst respondents.

Figure 18: Tour Operator Respondents by Gender

Figure 19: Tour Operator Respondents by Race
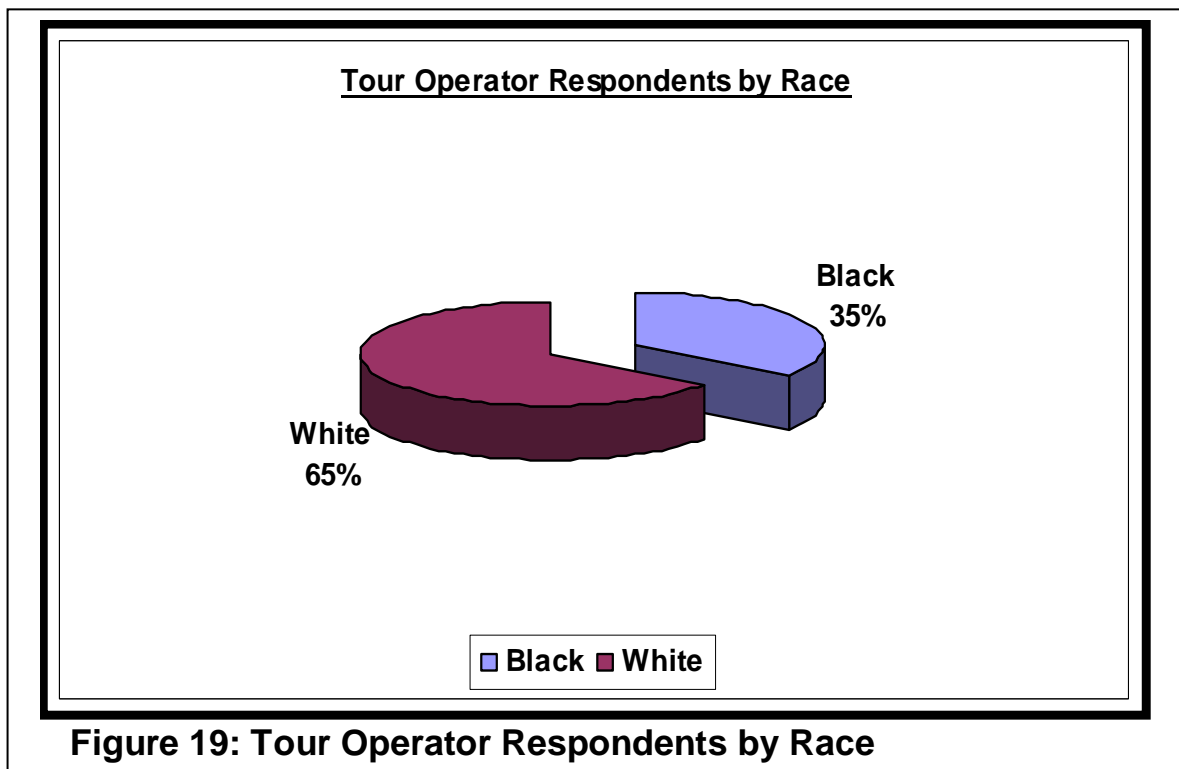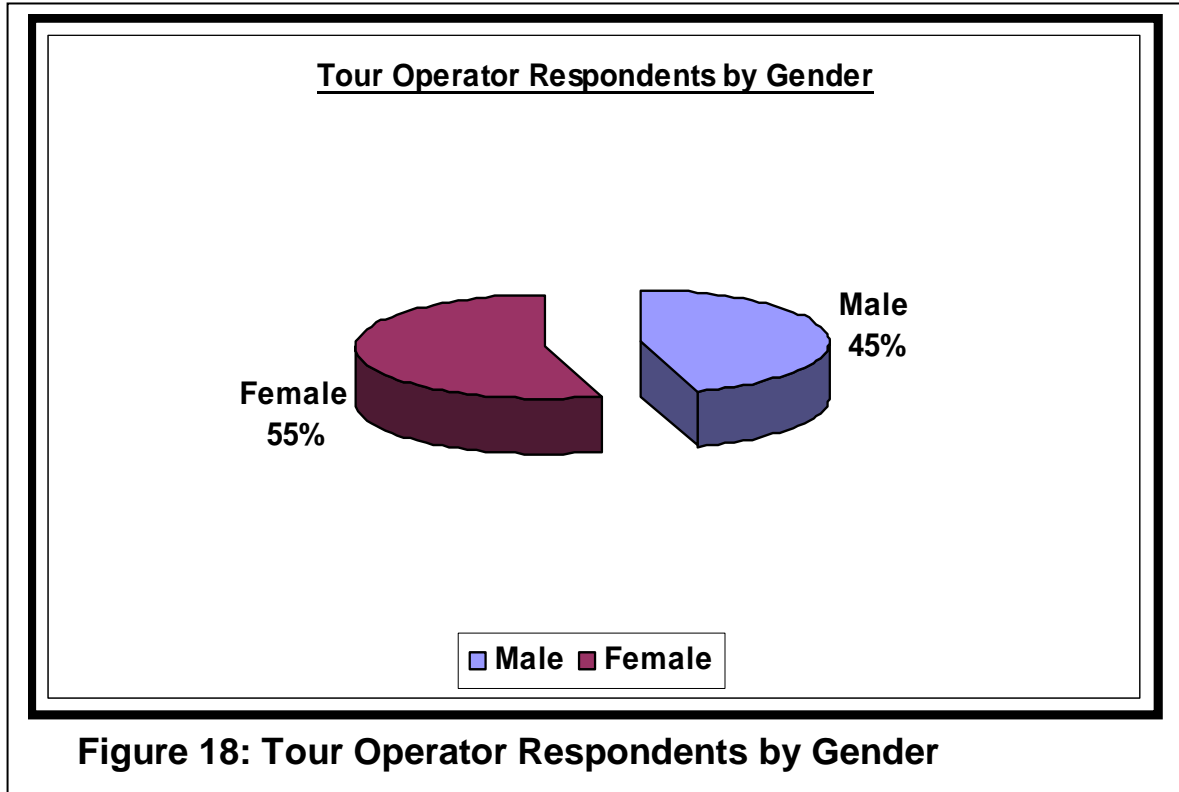
As illustrated in **Figure 19**, 7 of the 20 respondents were black accounting for 35% of total respondents, whilst the white respondents accounted for 65% of the total number of respondents. There were no marked differences in findings due to respondent race.

Findings from the questions posed to respondents.

1. *Zimbabwe's image today is the result of "sensationalising" issues by the media.*

    (Guiding proposition for this statement: P₃)

    Six respondents (30%) strongly agreed with the above statement, another 6 (30%) agreed. Three (15%) respondents neither agreed nor disagreed. Five Respondents (25%) disagreed. In summary 60% of the total respondents agreed that Zimbabwe's image was a result of sensational reporting by the media.

2. *When Zimbabwe hosted Miss Tourism World in 2005, this made me realise that the country had great potential as a tourist destination.*

    (Guiding proposition for this statement: P₁ₐ)

    Thirty five percent (7/20) of respondents disagreed with the above statement. Sixty percent (12/20) neither agreed nor disagreed, whilst the remaining 5% (1/20) agreed. In conclusion findings indicate that the majority of respondents did not see the impact of the Ms Tourism World contest that was held in February 2005 to promote the country's tourist destinations. It is worrying to note that only 5% believe that the contest made a difference considering that billions of Zimbabwe Dollars had been spent on the project. However, the percentage of respondents

who chose not to comment is very significant at 60% and would therefore need to be analysed further to determine the correct interpretation of respondents answers.

3. *Zimbabwe is still a favourable tourist destination.*

    (Guiding proposition for this statement: P$_2$)

    Five percent of respondents (1/20) strongly agreed that Zimbabwe was still a favourable tourist destination, 35% agreed. On the other hand 40% disagreed, whilst 20% neither agreed nor disagreed. In conclusion 40% agreed that Zimbabwe was still a favourable destination whilst 40% disagreed. However, the percentage of respondents who chose not to comment is fairly significant at 20% and would therefore need to be analysed further given the chance.

4. *People travel to Zimbabwe not for its publicised image but more for its actual characteristics.*

    (Guiding proposition for this statement: P$_2$)

    Twenty percent of the respondents (4/20) strongly agreed, 55% (11/20) agreed with the statement, whilst 15% (3/20) neither agreed nor disagreed. On the other hand 10% of the respondents (2/20) disagreed. These findings affirm Gilmore's (2002) observation that in some instances tourists will choose a destination not for its publicised image but for its actual characteristics. It is assumed that these tourists would have to be repeat or seasoned travellers to the destination to

appreciate its characteristics and still opt to go despite the publicised negative image as in the case of Zimbabwe.

5.   *If I had the option to view the Victoria Falls from the Zimbabwe or Zambia side, I would choose to go to the Zimbabwe side.*

(Guiding proposition for this statement: P$_2$)

Twenty percent of respondents (4/20) strongly agreed, 55% of respondents agreed (11/20) with the statement, 5% of respondents (1/20) neither agreed nor disagreed, whilst 20% of respondents (4/20) disagreed.   In conclusion, 75% of respondents concurred that they would choose to see the Victoria Falls from the Zimbabwe side against 25% who disagreed.   It is assumed that these finding indicate that the majority of operators are still optimistic about Zimbabwe (Victoria Falls in particular) as a destination despite the political issues currently affecting the country's image.

6.   *When you think about Zimbabwe you cannot help thinking about the negative press you have seen on Zimbabwe.*

(Guiding proposition for this statement: P$_3$)

Ten percent of respondents (2/20) strongly agreed, 25% (5/20) agreed with the statement. 20% of the respondents (4/20) neither agreed nor disagreed with the statement.   On the contrary 45% of respondents (9/20) disagreed. In summary 35% of respondents concurred whilst 45% disagreed.   It can therefore be assumed that despite Zimbabwe's current negative image in the press, this alone is not the deciding factor

that tour operator's take into consideration when recommending holiday destinations. However, the percentage of respondents who chose not to comment is fairly significant at 20% and would therefore need to be analysed further given the chance.

7. *The media has contributed to Zimbabwe's current negative image on the international arena.*

    (Guiding proposition for this statement: P$_3$)

    Ten percent of respondents (2/20) strongly agreed, 45% of respondents agreed (9/20) with the above statement. Twenty five percent (5/20) neither agreed nor disagreed, whilst 20% (4/20) of respondents agreed. Findings therefore indicate that 55% of respondents concur that the media has contributed to Zimbabwe's current negative image against 20% who disagree. However, the percentage of respondents who chose not to comment is fairly significant at 25% and would therefore need to be analysed further given the chance.

8. *Zimbabwe's image can be changed for the better, if government, the private sector and ordinary Zimbabweans work together.*

    (Guiding proposition for this statement: P$_{1b}$)

    Five percent of respondents (1/20) strongly agreed, 50% of respondents (10/20 agreed with the statement. Fifteen percent of respondents (3/20) neither agreed nor disagreed, whilst 30% of respondents (6/20) disagreed. The majority of respondents, 55%,

concurred that Zimbabwe's image could be changed for the better of all key stakeholders worked together against 30% who disagreed.

9. *Zimbabwe is currently one of Southern Africa's popular destinations.*
    (Guiding proposition for this statement: P$_2$)

Forty Five percent of respondents (9/20), agreed with the statement. 15% of respondents (3/20) neither agreed nor disagreed. On the other hand, 40% (8/20) respondents disagreed. In conclusion, the fact that less than 50% (i.e. only 45%) of respondents indicated that Zimbabwe was still one of the popular destinations in Southern Africa is cause for concern and highlights that work must be done to change these perceptions.

10. *Zimbabwe's image has been permanently tarnished on the International front.*
    (Guiding proposition for this statement: P$_2$)

Ten percent of respondents (2/20) strongly agreed, 15% of respondents (3/20) agreed, whilst 20% of respondents (4/20) neither agreed nor disagreed. On the other hand 55% of respondents (11/20) disagreed. In summary 55% of respondents disagreed that Zimbabwe's image had been permanently tarnished against 25% who concurred. It is assumed that these findings indicate that tour operators believe that something can still be done so change Zimbabwe's image for the

better. However, the percentage of respondents who chose not to comment is fairly significant at 20% and would therefore need to be analysed further given the chance.

(5) Findings from Measurement Instrument 5 – Questionnaire for Media

A total of 20 questionnaires were sent to media personnel representing 10 different media houses encompassing both the local and international media. Only 7 completed questionnaires were returned to the researcher. These 7 represented 7 different media houses with 4 representing local and representing international media. All respondents were Black.

Figure 20: Media Respondents by Gender
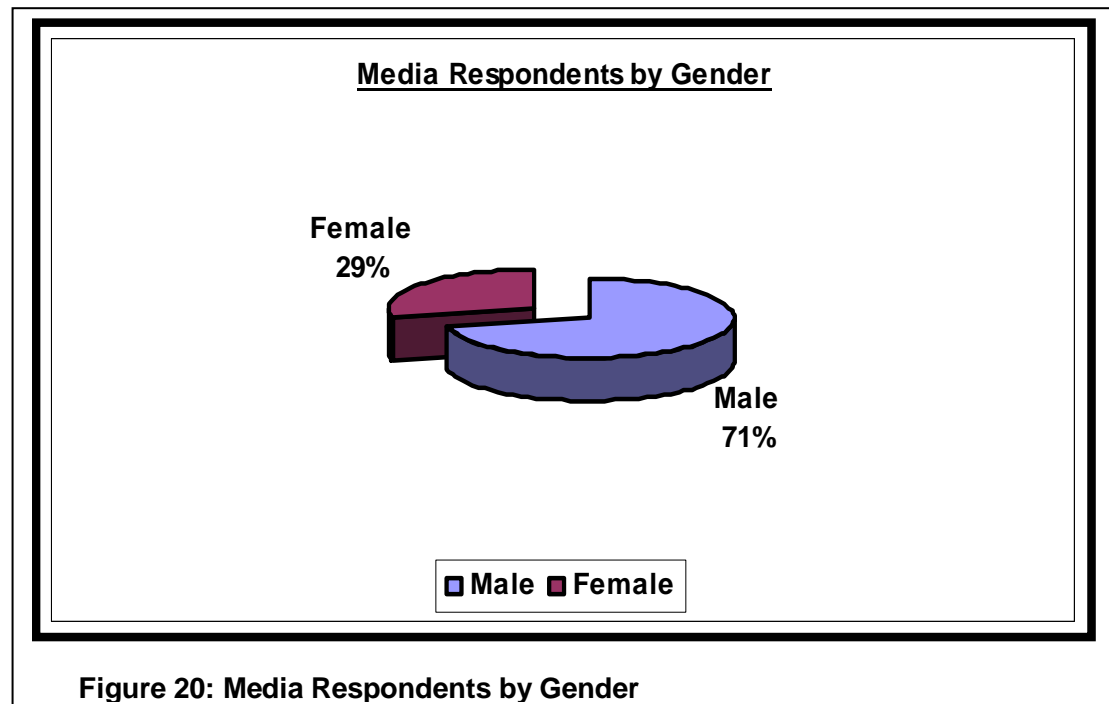
Female respondents accounted for 29% of total respondents whilst their male counterparts accounted for 71%. No marked differences emerged in the findings that the researcher can attribute to the gender of the respondents. As all respondents were Black and their age groups were not known, no analysis to determine differences or similarities due to race or age group was undertaken by the researcher.

As illustrated in **Figure 21**, 57% of the media respondents represented media houses in Zimbabwe (termed local in this study), whilst 43% represented

international media. Although international respondents had exactly the same responses to 20% of the statements posed, (i.e. 2/10 statements), there were no other marked differences or similarities from the respondents that could be attributed to their origin (i.e. local or international media).

Media Respondents by Origin

International
43%

Local
57%

◻ International ◼ Local

Figure 21: Media Respondents by Origin
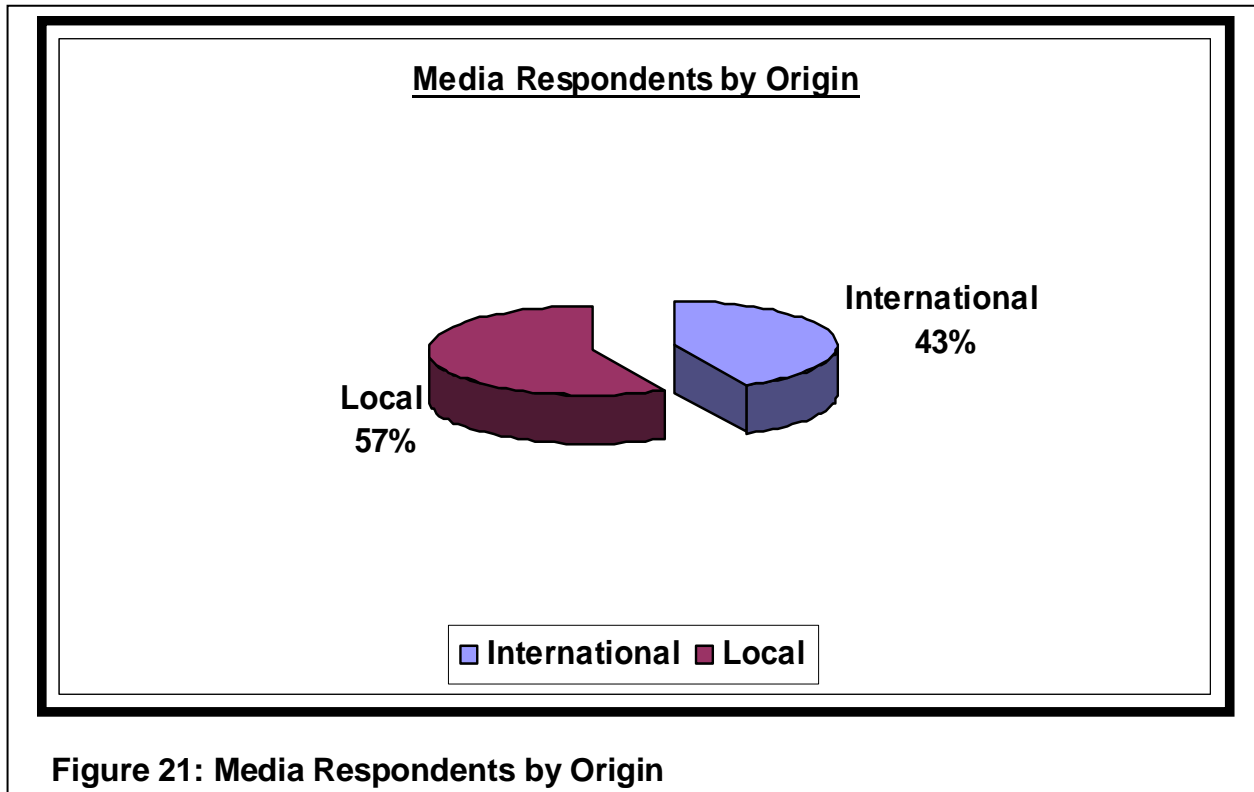
Findings from the questions posed to respondents.

1. The hosting of the Ms World Tourism in Zimbabwe placed the country on the globe for positive reasons.

(Guiding proposition for this statement: P_{1a})

Fourteen percent (14.3%) of respondents (1/7) strongly agreed, 71.4% of respondents agreed (5/7), whilst 14.3%, (1/7) neither agreed nor disagreed. 14.3% (1/7) disagreed.

In conclusion 85.7% of total respondents concurred that the hosting of the Ms Tourism World had placed the country on the globe for positive reasons,

against only 14.3% who disagreed. It is worth noting that 100% of the respondents from the international media concurred.

2. Zimbabwe's image today is the NOT the result of "sensationalising" issues by the media.

(Guiding proposition for this statement: P$_3$)

Close to twenty nine percent (28.6%) of respondents strongly agreed with the statement, with 42.9% agreeing. Fourteen percent (14.3%) neither agreed nor disagreed whilst 14.3% disagreed. In conclusion findings indicate that 71.5% of the respondents did not believe that Zimbabwe's current image was a result of sensational reporting.

3. If I had the option to view the Victoria Falls from Zimbabwe or Zambia side, I would choose to go to the Zimbabwe side.

(Guiding proposition for this statement: P$_2$;P$_3$)

Seventy one percent (71.4%) of the respondents strongly agreed with the above statement, whilst 28.6% agreed. In summary, findings indicate that 100% of the respondents would still prefer to see the Victoria Falls from the Zimbabwe side irregardless of the negative image bedevilling the country.

4.   Zimbabwe has been placed on the global scene thanks to talented individuals like golfer Nick Price; musician Oliver Mtukudzi; tennis stars – Black Family; swimming sensation Kristy Coventry; football star, Peter Ndlovu.

(Guiding proposition for this statement: P$_3$)

Zimbabwe's key personalities from the world of sport and art appeared to be recognised by the media. Twenty eight percent (28.6%) of respondents strongly agreed that Zimbabwe had been placed on the globe due to the talents of these personalities, whilst 42.9% agreed. Fourteen percent (14.3%) of the respondents were neutral, whilst an equal percentage disagreed. In summary, 71.5% of the respondents concurred with the statement.

5. The media has contributed to Zimbabwe's current negative image on the international arena.

(Guiding proposition for this statement: P₃)

Fourteen percent (14.3%) of the respondents strongly agreed with the above statement, whilst 71.4% agreed. Only 14.3% of respondents were neutral and none disagreed. It can therefore be concluded that according to the findings of this study, 85.7% of media respondents believed that the media had contributed to Zimbabwe's current negative image.

6. On the whole, the coverage of Zimbabwe on the international scene by the media has been fairly balanced.

(Guiding proposition for this statement: P₃)

Fourteen percent (14.3%) of the respondents strongly agreed with the above statement, whilst an equal percentage was neutral. Seventy one percent (71.4%) of the respondents strongly disagreed that the coverage of Zimbabwe on the international scene had been fairly balanced. In conclusion, according to the findings of this study, media respondents believe that reporting on Zimbabwe has not been fairly balanced.

7. The international media has tended to focus on negative stories regarding Zimbabwe.

(Guiding proposition for this statement: P₃)

Nearly twenty nine percent (28.6%) of respondents strongly agreed with the above statement, whilst a further 42.9% agreed. Fourteen percent (14.3%) of respondents were neutral, whilst another 14.3% disagreed. In summary, 71.5% of respondents indicated that the international media tended to focus on negative stories regarding Zimbabwe.

8. Media reports can make or break a country's image.

(Guiding proposition for this statement: P₃)

Seventy one percent (71.4%) of respondents strongly agreed with the above statement, whilst the remaining 28.6% agreed. In conclusion 100% of respondents concurred. It is worth noting that all respondents from the international media strongly believed that the media had the capacity to make or break a country's image.

9. Zimbabweans individual expressions about Zimbabwe have a bearing on the overall image of their country.

(Guiding proposition for this statement: P₁ᵦ)

Fifty seven percent (57.1%) of respondents strongly agreed that Zimbabweans individual expressions about their country had a bearing on the overall image of their country, whilst a further 28.6% agreed. Fourteen percent (14.3%) of respondents were neutral. In conclusion, findings from this study

indicate that 85.7% of media respondents believe that Zimbabweans individual expressions about their country will affect its overall image.

10. Zimbabwe's image can be changed for the better, if government, the private sector and ordinary Zimbabweans work together.

(Guiding proposition for this statement: P$_{1b}$)

Fifty seven percent (57%) of respondents strongly agreed that stakeholders could work together to change the image of Zimbabwe, whilst 43% agreed. In summary, findings from this study demonstrate that 100% of media respondents believe that if all key players come together to work on the country's image the goal of changing Zimbabwe's image for the better can be achieved.

CHAPTER SIX

6.0   DISCUSSION, CONCLUSIONS AND RECOMMENDATIONS

Consolidated key findings from the research process were as follows:-

Embassy interviewees stressed the importance of the role of Zimbabwe's government in foreign and domestic policy issues. There is a need to urgently address strong macroeconomic policies to avert further deterioration of economic and social conditions if FDI is to be attracted and current travel warnings for potential tourists lifted.

Focus groups echoed sentiments highlighted by Embassy respondents with regards to the urgent need for the implementation of strong macro economic policies. Whilst respondents in some cases indicated that some recovery strategies and frameworks were on paper, it was disturbing to note that there was no evidence of follow through by way of implementation. Focus groups emphasised the importance of a well coordinated plan of action which would consolidate the fragmented efforts aimed at improving the country's image by various stakeholders. The unfortunate situation of different players pursuing different strategies to arrive at the same goal was noted as being counter productive and a waste of scarce resources. A coordinated Public Relations and Communication Strategy is therefore strongly recommended if the country is serious about correcting its image. "Coordinating the message given out by a country is like that school physics experiment where you hold a magnet under a sheet of paper covered with iron filings: the filings just form a random heap until the moment the magnet is in place, when they miraculously align

themselves into a perfect and predictable shape around the poles of the invisible magnet. A strategy is the magnet; the iron filings are the thousands of messages which every…country constantly sends out into the world (for …inward investment, for trade and tourism, through acts of policy, through the Diaspora and the people at home…through embassies and consulates….” (Anholt, 2005: Page 118)

Despite the current socio-economic problems facing them, Zimbabweans are generally proud to be Zimbabwean citizens. The study revealed that 76.67% of Zimbabweans indicated that they would not change their citizenship given the chance to do so. This figure might be misleading and in fact disturbing as the flip side of the coin shows that the same Zimbabweans do not believe that the best opportunities for them are found in their country. Thus though Zimbabweans might not want to change their citizenship, this is no way guarantees that they want to remain in their country of birth. According to the findings of this research 46.67% of Zimbabweans did not believe that the best opportunities for Zimbabweans are to be found in Zimbabwe, against 43% who believed that they were. When prompted from a different angle 30% of the same respondents believed that Zimbabweans must look beyond Zimbabwe for better opportunities, whilst 40% disagreed. A significant 30% of the respondents were undecided at the time of the research. Findings from the IOM report of March 2005 indicate economic issues as being the prime reason why 3.5 million Zimbabweans are in the Diaspora today. It was encouraging to note that 90% of respondents believed that their personal views on Zimbabwe had an overall bearing on the country's image. Therefore

Zimbabweans must be challenged regarding the content of their utterances to the outside world. It is assumed that in some instances exaggerated media stories on Zimbabwe can be traced back to individuals wanting to enrich themselves personally. It is also assumed that any chaotic situation results in the enrichment of a select few. Based on this assumption, it could be that there are individuals who are benefiting in their personal capacity, thanks to the negative image of Zimbabwe? Today Zimbabwe's banks have no foreign currency in their coffers whilst individuals have it under their beds; basic food stuffs cannot be found in supermarkets yet the "black market" has them in abundance for those willing to pay the price; Service stations have no fuel and yet cars are still moving on the road. There is no foreign currency to import critical inputs for industry and yet Zimbabweans are known to be South Africa's major cash buyers for luxury Mercedes Benz car models. Corruption taints the image of any country and it is up to law enforcement agents to get to the root of the problem.

Findings from international tour operators were that Zimbabwe's popularity as a tourist destination was threatened due to the country's current negative image. At the end of the day tour operators are guided by their government's policies and are therefore not able to promote destinations against which their home governments have issued travel warnings.

All respondents indicated that the media was to some extent responsible for Zimbabwe's current negative image. However, it was also highlighted that to some degree, Zimbabwe was responsible for the media's insatiable appetite

of covering the country from a negative angle. It is recommended that stakeholders engage the media, especially the international media by repealing laws that currently make it impossible for some to broadcast from the country. Zimbabwe must show the media that it has nothing to hide; and that it has more good news than bad news. A clear (proactive) plan of action regarding how the country will manage the media must be drawn up.

Recommendations for embarking on a Country Branding Project for Zimbabwe

The researcher assumes that all key stakeholders in Zimbabwe are concerned with taking a proactive stance in rebranding the country. The researcher has used the findings of the research to determine the degree of commitment and preparedness amongst key stakeholders in embarking on a project of this magnitude. This information (degree of commitment and preparedness to rebranding the country) has been summarised in the data for the project health check (please see **Appendix 5**) and is illustrated in **Figure 22**. The researcher recommends that this project of rebranding Zimbabwe would have to be undertaken in a period stretching for at least 2 years. To try and complete this project in a shorter period though desirable is not recommended. As highlighted by Anholt, "A nation- brand is like the proverbial supertanker, which takes five miles to change course and eight miles to stop" (Anholt, 2005: Page 116). In the same vein, Zimbabwean stakeholders cannot expect their country's image to simple "turn over a new leaf" within a short period of time. Though work might start now, results will not be immediate; efforts will only start to field positive results in the future.

As much as a task force would be appointed to embark on this project, it is important that a project manager be appointed to coordinate the overall project.

Figure 22: Country Branding Project Health Check Analysis
(Adapted from Lecture notes from lecturer J.J. Coetzee, UNISA, SBL 2005).
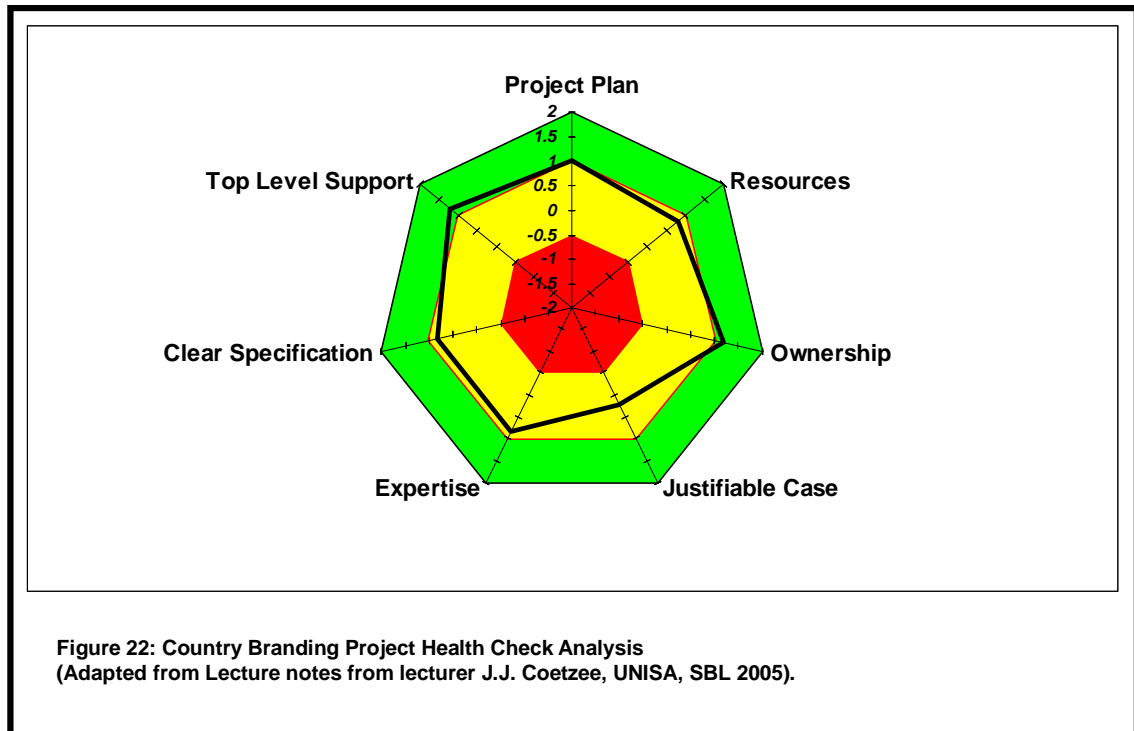
The analysis as indicated by Figure 22, the Country Branding Project Health check on Zimbabwe's proposed branding exercise illustrates a medium risk project. This means that the project can be undertaken with a fair chance of being a success. Low scores (please see **Appendix 5** for data) in the areas of Justifiable Case (0.20), Ownership (0.80) and Clear Specification (0.80) indicate areas of concern that would need to be addressed before this project is embarked upon.

As alluded to in Chapter Three, Kotler et al (1993) affirm that if a country finds itself "in trouble", to help itself get "out of trouble" it is recommended that the following six fundamental tasks must be carried out: -

(1)   Zimbabwe through its stakeholders tasked with place marketing must interpret what is happening in its broad environment. Findings from this study indicate that Zimbabwe's image problems are partly due to politically motivated issues which can be managed through a foreign and domestic policy initiated by government. Although "emotionally charged" discussions tended to focus on the question of the country's leadership as being the main stumbling block in weeding out the evils bedevilling the country's image, there were no compelling findings from the study to solidify this assumption. In this regard stakeholders must avoid the pitfalls of adopting popular belief in place of fact.

(2)   Zimbabwe through its stakeholders tasked with place marketing) must understand the needs, wants, and behaviour choices of specific internal and external constituencies. Findings from this research indicated that embassy respondents, tour operators, focus groups drawn from key sectors, the media and Zimbabweans in general all had perceptions and expectations regarding the country's image. These must be drawn into the overall plan.

(3) Zimbabwe (i.e. through its stakeholders tasked with place marketing) must build a realistic vision of what the place can be. It is important to understand that Zimbabwe cannot be all things to all

people. Stakeholders must look at the current picture of the country, and what they want it to be realistically.

(4) Zimbabwe (i.e. through its stakeholders tasked with place marketing) must create an actionable plan to complement the vision.

(5) Zimbabwe (i.e. through its stakeholders tasked with place marketing) must build internal consensus and effective organization.

(6) Zimbabwe (i.e. through its stakeholders tasked with place marketing) must evaluate at each stage the progress being achieved with the action plan.

CONCLUSION ON FINDINGS

Despite the fact that the propositions used for this study were drawn from western theories and examples, findings from the research which concentrated on an African country, Zimbabwe, indicate to some degree, that the same propositions can be considered as fundamental in branding African countries as well. It must be stressed that the time element in which this study was undertaken (about 10 months) could have affected the conclusions drawn from findings regarding some propositions. More time would be needed to draw up more conclusive findings on the same propositions.

Hosting of Ms Tourism World in Zimbabwe was not seen to have helped the country change its image in any meaningful way. Therefore this research did not conclude that a country's image may shift as a result of intervening events (e.g. hosting of Olympics in the case of Spain, Gilmore 2002). Firstly, extenuating circumstances regarding the manner in which the event was orchestrated (i.e. not well planned) might have contributed to these findings. Secondly, this study was carried out six months after the hosting of the pageant which could be interpreted as being too early to see any meaningful results. A fair evaluation of the impact of the programme in changing the image of Zimbabwe should be done some time in the future. Perhaps two years after the actual event.

Theoretically, findings concluded that a country's stakeholders can actively reposition the image of their nation as was espoused by Kotler,Haider &

Rein (1993) and Gilmore (2002). In the case of Zimbabwe this can be fully concluded after the branding exercise has been implemented.

The study reaffirmed the proposition advanced by Kotler, Haider & Rein (1993); Gilmore (2002) and Anholt (2003& 2005) that country political dynamics have a significant bearing on the brand equity of a country with specific reference to Zimbabwe's Commonwealth withdrawal; Zimbabwe's controversial land reform programme ; and Zimbabwe's "Operation Restore Order".

The study concluded that media reports have the potential to "make or break" a country's image as was affirmed in previous studies by Kotler, Haider & Rein (1993); Gilmore (2002) and Anholt (2003 & 2005)

In conclusion, a respondent summed up the current image of Zimbabwe as being like a set of pearls, scattered all over the floor due to a broken string – simply needing to be restrung together. Whilst all the ingredients (pearls) are present to change the image of the country for the better, there is need for a concerted effort from all stakeholders, who working together for a common cause can find "the string" to rethread these scattered pearls together again.

CHAPTER SEVEN

7.0 ARTICLE FOR PUBLICATION

Please note that the article for publication is available as a separate

document.

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THE SECONDARY DATA SOURCES USED.

The study made use of the following sources of secondary data:-

(a)   Zimbabwe's Macro-Economic Policy Framework (2005-2006), Harare, 2004.

(b)   Zimbabwe's Monetary Policy (2005)

(c)   Zimbabwe's Tourism Recovery Master Plan (2005)

(d)   Websites on Zimbabwe e.g. Newzimbabwe.com

(e)   Investment websites

(f)   Tourist/ Travel websites

(g)   Newspapers

APPENDICES

APPENDIX 1:
CONFIDENTIALITY LETTER

Ref: Mrs Elsabe Broodryk
Tel: + 27 11 6520352
e-mail: broodje@unisa.ac.za
Web: www.sblunisa.ac.za

2005-05-13

<u>TO WHOM IT MAY CONCERN</u>

NON-DISCLOSURE LETTER

This confirms that **Ms S Gumpo (student number 34462481)** a registered final year student is at the Graduate School of Business Leadership. She is doing the Research Report as part of the requirements of obtaining the MBL postgraduate degree. **Her topic**: *Branding a country – The case of Zimbabwe*

Please be of assistance with the collecting of research material and feedback on questionnaires to complete the report.

On behalf of the Business School and Ms Gumpo we thank you for your cooperation.

Yours sincerely

MS C STRASHEIM
MANAGER: MBL 3
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APPENDIX 2:

EXAMPLES TRAVEL WARNINGS ISSUED AGAINST ZIMBABWE

British Foreign and Commonwealth office travel warning

Reference: www.fco.co.uk

June 22 2005
- There has been an increase in tension in urban areas and a general increase in the level of violent crime. There is a continuing risk of violence and political demonstrations, **but main tourist areas have been largely unaffected by political and social unrest.**
- We advise against visiting the high-density suburbs.
- These have been the scene of all the recent violence and tension.
- This is especially relevant to the government's recent 'Clean up' campaign.
- You should avoid engaging in overtly partisan political activity or in activities that can be construed as such.
- **Most visits to Zimbabwe are trouble free.** We recommend travel with organized tour operators to well established destinations. We strongly advise against independent travel (i.e. backpacking).
- Mugging and pick pocketing are becoming prevalent in Harare and Victoria falls especially after dark.
- Visitors to these areas should be very wary as tourists especially back packers are principal targets of casual thieves.
- Armed car jacking is also becoming a reason for concern in the major towns and city areas.
- Traffic accidents are also a common cause of injury and death. Roads are generally in good condition however you should avoid driving outside of main towns as the roads are poorly lit and not well marked. Pedestrians and roaming livestock are additional dangers.
- We strongly recommend that you obtain comprehensive travel and medical insurance before travelling.

New Zealand High Commission

Reference: http://www.mft.govt.nz/

The New Zealand high commission has issued warnings about the socio-economic unrest in Zimbabwe. It states:
- Political unrest and deteriorating economic situation. Avoid public gatherings and demonstrations. Strongly advise against independent travel. For a more in depth report please visit the Web Site.

The United States Department of State Travel warning.

Reference: http://travel.state.gov/travel/cis_pa_tw/cis_pa_tw_1168.html

July 11 2005
- The Department of State cautions U.S. citizens of the risks of travel to Zimbabwe, a country in the midst of political and economic turmoil. All U.S. citizens in Zimbabwe are advised to take those measures they deem appropriate to ensure their personal safety.
- Zimbabwe's economy is in a protracted state of decline, with extremely high rates of unemployment and inflation.
- Food shortages continue to be an on-going problem.
- Deteriorating economic conditions have led to a significant increase in crime. Periodic fuel shortages in areas throughout Zimbabwe can hinder travel.
- There have been incidents of violence in periods leading up to and following major elections. Reports of violent incidents are running well below levels prior to previous elections, but the possibility of increased violence before elections, is still a concern.
- American citizens should avoid political rallies and other events with potential political sensitivities.
- Avoid commercial farms, especially those occupied by settlers or so-called "war veterans," who are typically young government supporters acting with impunity outside the law.

All Americans who travel to or reside in Zimbabwe are urged to register and obtain updated information on travel and security in Zimbabwe with the U.S. Embassy in Harare or on the State Department's travel registration website.

Japan

Japanese Tour Operators- (Meeting at Sheraton 8 July 2005)

Japan operates 4 levels of travel warnings with level 1 being the most extreme (i.e. Japanese nationals should not travel to this destination) and level 4 being the least extreme (i.e. Japanese nationals can travel to this destination but must follow safety procedures as detailed by their Government). Zimbabwe is currently on level 4, meaning that Japanese nationals can travel to Zimbabwe on organised tours especially to tourist resorts.

Foreign Affairs, Canada

Reference: www.voyage.gc.ca

- Zimbabwe has experienced disruptions in the supply of both diesel and petrol in recent years. While these are starting to improve, shortages still occur.
- Canadians should also be aware that interruptions in water and electrical supply occur regularly in many areas.
- The quality and safety of services such as public transportation and health care has been greatly reduced.
- Crime exacerbated by a very difficult economic situation remains a serious problem for foreign visitors and residents alike.
- Canadians within Zimbabwe should maintain a very high level of personal security awareness e.g. monitor local news reports closely and avoid travelling at dark and avoid large crowds and public gathering.
- It is a criminal offence to make derogatory or insulting comments about President Mugabe.
- Visits to the commercial farms also carry some risk.

Forbes.com – Most dangerous destinations 2005 report
www.forbes.com
Zimbabwe is listed as one of the most dangerous destinations for 2005.
"Unemployment and inflation have effectively devastated the Zimbabwean economy. Annual March parliamentary elections are a particularly tense time, as election-related vote rigging and intimidation spark violence and unstable political rallies, especially in the high-density city of Harare. Commercial farms, home to government supporters who act with impunity from the law, are particularly dangerous to foreigners. Food and fuel shortages are widespread".

APPENDIX 3:

RESEARCH INSTRUMENTS USED IN THE STUDY:

       I.   Embassy officials - questionnaire 1

       II   Focus group discussion guideline - questionnaire 2

       III Questionnaire for Zimbabwe Residents - questionnaire 3

       IV Tour operator/ visitor - questionnaire 4.

       V   Media - questionnaire 5

All the questionnaires have a cover page entitled **"For Student and Study Leader use only".** This page is a suggestion to the study leader on what the researcher would like to achieve with the questionnaire. This page is not distributed to respondents.

FOR STUDENT AND STUDY LEADER USE ONLY

Measurement instrument 1 (Qualitative)

Discussion guide for Embassy officials

Sampling frame: Embassies based in Harare including those whose home governments are perceived to be "anti-Zimbabwe"

.

Objective – To ascertain how Zimbabwe is currently viewed internationally and what measures can be adopted to change this image if it is negative.

Guiding Propositions: P_1 to P_3 inclusive.

P_1   (a) A country's image may shift slowly over time or quickly as a result of intervening events (e.g. hosting of Olympics in the case of Spain; Hosting of Ms Tourism World in the case of Zimbabwe)

(b) A country's stakeholders can actively reposition the image of their nation.

P_2   Country political dynamics have a significant bearing on the brand equity of a country especially the Commonwealth withdrawal, the controversial land reform and others in the case of Zimbabwe.

P_3   Media reports can make or break a country's image.

INTERVIEW GUIDELINES FOR EMBASSY OFFICIALS <u>(QUESTIONNAIRE 1)</u>

1.   When one says Brazil, what is the first thing that comes to your mind? What is the first thing that crosses your mind when the name Zimbabwe is mentioned?

2.   Does your country currently have a travel warning issued against Zimbabwe?

3.   What measures would the Zimbabwe government need to put in place to attract FDI from your country?

4.   What measures would the Zimbabwe government need to put in place to attract tourist visitors from your country?

5.   Where do you see Zimbabwe in the next two years?

Measurement instrument 2 (Qualitative)

Discussion guide for 2 focus groups with participants for the first group being drawn from the public sector (Ministry of Tourism/ Finance and International Trade; Zimbabwe Tourism Authority (ZTA) and individuals working in the public sector). The second focus group will be drawn from the private sector (Zimbabwe Council for Tourism (ZCT); Zimbabwe Chamber of Commerce and Industries (ZCCI); Individuals working in the private sector).

Maximum number of focus group discussions - 2

Objective of the survey – Ascertain the various stakeholders' degree of commitment to changing the image of the country.

Guiding propositions: P_1 to P_3 inclusive.

P_1 (a) A country's image may shift slowly over time or quickly as a result of intervening events (e.g. hosting of Olympics in the case of Spain; Hosting of Ms Tourism World in the case of Zimbabwe)

(b) A country's stakeholders can actively reposition the image of their nation.

P_2 Country political dynamics have a significant bearing on the brand equity of a country especially the Commonwealth withdrawal, the controversial land reform and others in the case of Zimbabwe.

P_3 Media reports can make or break a country's image.

FOCUS GROUP DISCUSSION GUIDELINES

(QUESTIONNAIRE 2)

The researcher is aware that a Macro-Economic Policy Framework for 2005-2006 has been launched by the Ministry of Finance, which focuses on a "Ten Point "recovery plan for Zimbabwe. Although a general overview of the "Ten Point" plan will be solicited in the discussion, the researcher's focus will be on government's efforts in improving the image of the country. Citations taken from the Macro-Economic Policy Framework document will form the basis of the discussion guide for the focus groups.

Question 1 - What is the "Ten Point" plan?

Citation 1 – "The country has experienced capital flight and dwindling foreign investment due to sanctions and the perceived country's political and economic risk factors. This has significantly reduced inflows of foreign exchange, which has led to a reduction in capacity and overall economic decline". (Macro-Economic Policy Framework: page 83)

Question 2: What measures have been put in place or need to be put in place to redress these challenges?

Citation 2 – " As part of the on-going efforts to improve the country's image, Government, together with its social partners, namely Labour and Business, will implement the **Kadoma Declaration**. *Each social partner will work out implementation modalities and position papers for presentation to the Tripartite Negotiating Forum".- (Macro-Economic Policy Framework: page 83)*

Question 3 – Please briefly explain what the *Kadoma Declaration* is and how government sees this declaration changing the image of Zimbabwe?

Citation 3 – "In line with the need for a well-managed Government information strategy, the Media will also be encouraged to be more objective and strive to acknowledge and promote positive initiates for the good of the country"- (Macro-Economic Policy Framework: page 83)

Question 4 – How has Government gone about implementing the above?

Citation 4 – It is imperative that there be a well co-coordinated and managed interface between Government in its collectivity and foreign agencies that allows for choreographed and timely responses to challenges facing the country. To this end there is a compelling need for the implementation in tandem, of Government policies that impact on the foreign relations in view of the conjoined nature of Government operations" - (Macro-Economic Policy Framework: page 83)

Question 5 - How far has government gone in implementing the above? What challenges are you facing?

Question 6 - How are government initiatives in improving the image of the country being coordinated with those of the private sector?

Citation 5 - "The International Marketing Council of South Africa was brought into being in August 2000 upon the realisation that it was absolutely imperative to create a positive and compelling brand image for South Africa. At the time, there were many messages entering the international arena. The messages were as varied as the source and, quite obviously, did very little for solid brand building. It was evident that a great need existed for a body able to co-ordinate the marketing initiatives in order to maximise their efficiency".

Question 7 - South Africa has put in place the IMC whose aim is to coordinate initiatives on country branding. Zimbabwe currently has various initiatives aimed at the repositioning?

Question 8 – Did the hosting of Ms Tourism World in February 2005 place us on the world map? Why?

<u>Measurement instrument 3 (Quantitative)</u>

Questionnaire for Zimbabwean residents (including Zimbabweans living in the Diaspora)

Sampling frame: 30 Zimbabweans

Guiding propositions: P_1 to P_3 inclusive.

P_1   (a) A country's image may shift slowly over time or quickly as a result of intervening events (e.g. hosting of Olympics in the case of Spain; Hosting of Ms Tourism World in the case of Zimbabwe)

(b) A country's stakeholders can actively reposition the image of their nation.

P_2   Country political dynamics have a significant bearing on the brand equity of a country especially the Commonwealth withdrawal, the controversial land reform and others in the case of Zimbabwe.

P_3   Media reports can make or break a country's image.

QUESTIONNAIRE 3

1.   As a Zimbabwean I can influence the way Zimbabwe is viewed by other citizens of the world through my personal opinion on how I view the country.

1	Strongly agree	
2	Agree	
3	Neither agree or disagree	
4	Disagree	
5	Strongly disagree	

2.   When I travel outside Zimbabwe, I believe that people tend "look down" on me when I mention that I am Zimbabwean.

1	Strongly agree	
2	Agree	
3	Neither agree or disagree	
4	Disagree	
5	Strongly disagree	

3.   Given the chance, I would change my citizenship from being Zimbabwean to another nationality of my choice.

1	Strongly agree	
2	Agree	
3	Neither agree or disagree	
4	Disagree	
5	Strongly disagree	

4.   The best opportunities for Zimbabweans are found in Zimbabwe.

1	Strongly agree	
2	Agree	
3	Neither agree or disagree	
4	Disagree	
5	Strongly disagree	

5.   Zimbabweans must look beyond Zimbabwe for better opportunities.

1	Strongly agree	
2	Agree	
3	Neither agree or disagree	
4	Disagree	
5	Strongly disagree	

6.   My individual expressions about Zimbabwe have a bearing on the overall image of the country.

1	Strongly agree	
2	Agree	
3	Neither agree or disagree	
4	Disagree	
5	Strongly disagree	

7.   Zimbabwe's image on the global arena has been permanently tarnished and nothing can be done to change this.

1	Strongly agree	
2	Agree	
3	Neither agree or disagree	
4	Disagree	
5	Strongly disagree	

8.   Zimbabwe's image can be changed for the better, if government, the private sector and ordinary Zimbabweans work together.

1	Strongly agree	
2	Agree	
3	Neither agree or disagree	
4	Disagree	
5	Strongly disagree	

9.   Zimbabwe has both physical and human assets to make it one of the best destinations in the world.

1	Strongly agree	
2	Agree	
3	Neither agree or disagree	
4	Disagree	
5	Strongly disagree	

10. The media can make or break a country's image.

1	Strongly agree	
2	Agree	
3	Neither agree or disagree	
4	Disagree	
5	Strongly disagree	

FOR STUDENT AND STUDY LEADER USE ONLY

Measurement instrument 4 – (Quantitative)

Questionnaire for Tour Operators

Sampling frame: 20 tour operators

Guiding propositions: P_1 to P_3 inclusive.

P_1   (a) A country's image may shift slowly over time or quickly as a result of intervening events (e.g. hosting of Olympics in the case of Spain; Hosting of Ms Tourism World in the case of Zimbabwe)

(b) A country's stakeholders can actively reposition the image of their nation.

P_2   Country political dynamics have a significant bearing on the brand equity of a country especially the Commonwealth withdrawal, the controversial land reform and others in the case of Zimbabwe.

P_3   Media reports can make or break a country's image.

QUESTIONNAIRE 4

1. Zimbabwe's image today is the result of "sensationalising" issues by the media.

1	Strongly agree	
2	Agree	
3	Neither agree or disagree	
4	Disagree	
5	Strongly disagree	

2. When Zimbabwe hosted Miss Tourism World in 2005, this made me realize that the country had great potential as a tourist destination.

1	Strongly agree	
2	Agree	
3	Neither agree or disagree	
4	Disagree	
5	Strongly disagree	

3. Zimbabwe is still a favourable tourist destination.

1	Strongly agree	
2	Agree	
3	Neither agree or disagree	
4	Disagree	
5	Strongly disagree	

4. People travel to Zimbabwe not for its publicized image but more for its actual characteristics.

1	Strongly agree	
2	Agree	
3	Neither agree or disagree	
4	Disagree	
5	Strongly disagree	

5. If I had the option to view the Victoria Falls from Zimbabwe or Zambia side, I would choose to go to the Zimbabwe side.

1	Strongly agree	
2	Agree	
3	Neither agree or disagree	
4	Disagree	
5	Strongly disagree	

6. When you think about Zimbabwe you cannot help thinking about the negative press you have seen on Zimbabwe.

1	Strongly agree	
2	Agree	
3	Neither agree or disagree	
4	Disagree	
5	Strongly disagree	

7. The media has contributed to Zimbabwe's current negative image on the international arena.

1	Strongly agree	
2	Agree	
3	Neither agree or disagree	
4	Disagree	
5	Strongly disagree	

8. Zimbabwe's image can be changed for the better, if government, the private sector and ordinary Zimbabweans work together.

1	Strongly agree	
2	Agree	
3	Neither agree or disagree	
4	Disagree	
5	Strongly disagree	

9. Zimbabwe is currently one of Southern Africa's popular destinations.

1	Strongly agree	
2	Agree	
3	Neither agree or disagree	
4	Disagree	
5	Strongly disagree	

10. Zimbabwe's image has been permanently tarnished on the International front.

1	Strongly agree	
2	Agree	
3	Neither agree or disagree	
4	Disagree	
5	Strongly disagree	

FOR STUDENT AND STUDY LEADER USE ONLY

Measurement instrument 5 – **Questionnaire for Media (Quantitative)**
Guiding propositions: P_1 to P_3 inclusive.

P_1 (a) A country's image may shift slowly over time or quickly as a result of intervening events (e.g. hosting of Olympics in the case of Spain; Hosting of Ms Tourism World in the case of Zimbabwe)

       (b) A country's stakeholders can actively reposition the image of their nation.

P_2 Country political dynamics have a significant bearing on the brand equity of a country especially the Commonwealth withdrawal, the controversial land reform and others in the case of Zimbabwe.

P_3 Media reports can make or break a country's image.

QUESTIONNAIRE 5

1. The hosting of the Ms World Tourism in Zimbabwe placed the country on the globe for positive reasons.

1	Strongly agree	
2	Agree	
3	Neither agree or disagree	
4	Disagree	
5	Strongly disagree	

2. Zimbabwe's image today is the NOT the result of "sensationalising" issues by the media.

1	Strongly agree	
2	Agree	
3	Neither agree or disagree	
4	Disagree	
5	Strongly disagree	

3. If I had the option to view the Victoria Falls from Zimbabwe or Zambia side, I would choose to go to the Zimbabwe side.

1	Strongly agree	
2	Agree	
3	Neither agree or disagree	
4	Disagree	
5	Strongly disagree	

4. Zimbabwe has been placed on the global scene thanks to talented individuals like golfer Nick Price; musician Oliver Mtukudzi; tennis stars – Black Family; swimming sensation Kristy Coventry; football star, Peter Ndlovu.

1	Strongly agree	
2	Agree	
3	Neither agree or disagree	
4	Disagree	
5	Strongly disagree	

5. The media has contributed to Zimbabwe's current negative image on the international arena.

1	Strongly agree	
2	Agree	
3	Neither agree or disagree	
4	Disagree	
5	Strongly disagree	

6. On the whole, the coverage of Zimbabwe on the international scene by the media has been fairly balanced.

1	Strongly agree	
2	Agree	
3	Neither agree or disagree	
4	Disagree	
5	Strongly disagree	

7. The international media has tended to focus on negative stories regarding Zimbabwe.

1	Strongly agree	
2	Agree	
3	Neither agree or disagree	
4	Disagree	
5	Strongly disagree	

8. Media reports can make or break a country's image.

1	Strongly agree	
2	Agree	
3	Neither agree or disagree	
4	Disagree	
5	Strongly disagree	

9. Zimbabweans individual expressions about Zimbabwe have a bearing on the overall image of their country.

1	Strongly agree	
2	Agree	
3	Neither agree or disagree	
4	Disagree	
5	Strongly disagree	

10. Zimbabwe's image can be changed for the better, if government, the private sector and ordinary Zimbabweans work together.

1	Strongly agree	
2	Agree	
3	Neither agree or disagree	
4	Disagree	
5	Strongly disagree	

RES	BLK	WHT	OTHER	M	F	D	AGE	Q1 P1-b	Q2 P1-b/P3	Q3 P1-b/P2	Q4 P1/P2	Q5 P1/P2	Q6 P1-a	Q7 P2/P3	Q8 P1/P2	Q9 P1/P2	Q10 P3
1	B			M		D	20-30	2	-2	-1	0	0	2	-2	2	2	2
2	B			M		D	31-40	2	2	-1	-2	2	2	1	2	2	1
3	B			M			31-40	2	-1	-2	-2	0	2	-2	1	2	2
4	B			M			41-50	2	2	-2	2	-1	1	-1	2	2	1
5	B			M			41-50	1	1	-2	-1	1	1	-2	2	2	2
6	B			M			41-50	2	1	-2	2	-1	2	-1	1	1	2
7	B			M			31-40	2	2	-2	-1	0	1	-1	2	2	2
8	B			M			41-50	2	-1	-2	-2	0	2	-2	2	2	2
9	B			M			31-40	2	0	-2	-1	0	0	-1	1	2	1
10	B			M			31-40	0	-1	2	-1	0	-1	-1	1	1	-2
11	B			M			41-50	2	-1	2	1	-1	2	-2	2	2	2
12	B			M			20-30	2	1	-1	0	0	1	-1	1	2	2
13	B			M			20-30	2	-2	-2	0	-2	2	-2	2	2	1
14	B				F	D	31-40	1	1	2	-1	-1	0	0	1	1	2
15		W			F		51-60	2	1	-2	2	-1	2	-1	2	2	1
16		W			F		51-60	2	-2	-2	2	-2	2	-2	-2	2	2
17			O		F		20-30	2	0	-1	-1	1	1	-2	2	2	1
18		W			F	D	20-30	1	1	0	-1	1	1	-1	2	2	1
19	B				F		31-40	2	-1	-1	0	-1	2	-2	2	1	2
20	B				F		31-40	1	-1	-2	-1	1	2	2	1	1	2
21	B				F		31-40	2	-2	2	2	2	2	-2	2	2	2
22	B				F		31-40	2	1	-1	2	-2	2	-2	0	2	1
23	B				F		31-40	-1	2	-2	1	-1	1	-1	2	2	2
24	B				F		20-30	2	0	-2	1	1	1	-1	2	1	2
25	B				F		31-40	2	0	-1	0	-1	2	-2	2	2	0
26	B				F		41-50	2	0	0	-1	0	1	-2	2	2	1
27	B				F		31-40	-1	-1	-2	2	0	-2	-2	2	2	2
28	B				F		31-40	1	1	-2	0	-1	0	-1	2	2	2
29	B				F		31-40	1	1	1	-1	2	1	-1	2	2	2
30	B			M		D	20-30	2	-1	-1	-1	1	1	-1	2	2	2

APPENDIX 4: (a) Data collected for Questionnaire 3 – Zimbabwean Residents/ Zimbabweans in the Diaspora

T/O	BLK	WHT	M	F	CTRY				Q1 P3	Q2 P1-a	Q3 P2	Q4 P2	Q5 P2	Q6 P3	Q7 P3	Q8 P1-b	Q9 P2	Q10 P2
1		W	M		MEXICO				2	0	0	2	2	-1	1	-1	0	-1
2		W	M		USA				2	-1	2	0	2	-1	2	1	1	1
3		W		F	ARGENTINA				0	-1	0	0	-1	1	2	1	-1	2
4	B		M		USA				-1	0	1	1	1	-1	-1	1	0	0
5	B			F	UK				1	-1	-1	2	1	1	-1	-1	-1	2
6		W	M		USA				1	0	1	1	2	-1	0	1	1	-1
7		W	M		USA				2	0	-1	1	1	0	-1	0	-1	1
8		W	M		USA				0	-1	0	1	1	-1	1	1	-1	-1
9	B			F	UK				1	1	1	1	1	-1	1	1	1	-1
10	B		M		USA				-1	0	1	0	2	-1	0	-1	1	0
11		W		F	UK				2	0	-1	1	1	0	1	1	-1	-1
12		W		F	USA				-1	-1	1	1	1	-1	1	0	1	1
13	B			F	UK				2	0	1	1	1	2	0	-1	1	-1
14	B			F	USA				-1	-1	0	-1	-1	1	1	-1	0	-1
15		W	M		USA				2	0	-1	1	1	1	1	2	-1	-1
16		W		F	UK				-1	0	-1	1	-1	1	1	1	-1	0
17		W		F	USA				1	0	-1	1	0	0	0	1	1	0
18		W		F	USA				0	-1	-1	-1	1	0	-1	0	1	-1
19		W	M		USA				1	0	-1	2	-1	2	1	1	-1	-1
20	B			F	USA				1	0	1	2	1	-1	0	-1	1	-1

APPENDIX 4: (b) Data collected for Questionnaire 4 – International Tour Operators

	LOC	INT	MALE	FEMALE	Q1 P1a	Q2 P3	Q3 P2/P3	Q4 P3	Q5 P3	Q6 P3	Q7 P3	Q8 P3	Q9 P1b	Q10 P1b
1	LOC		MALE		1	2	2	-1	1	-1	2	2	2	2
2	INT		MALE		1	-1	1	2	1	2	2	2	1	2
3	LOC			FEMALE	0	1	1	0	1	-1	1	1	0	1
4	INT		MALE		1	1	2	1	2	-1	1	2	2	2
5	LOC			FEMALE	2	2	2	2	0	-1	-1	2	2	2
6	INT		MALE		1	0	2	1	1	0	0	2	2	1
7	LOC		MALE		1	1	2	1	1	-1	1	1	1	1
8														
9														

APPENDIX 4: (c) Data collected for Questionnaire 5 – Media respondents

APPENDIX: 5 – Data for proposed "Branding Zimbabwe" Project

Country Branding Project Health Check Analysis

Project Number/Name: Country Branding Exercise

Project Manager: Sibonokuhle Gumpo

Risk/health check score	6.00		**Medium Risk**

Individual Risks (Scores from -2 to +2)	
Country Branding Project Plan	1.00
Resources	0.80
Ownership	1.20
Justifiable Case	0.20
Expertise	0.80
Clear Specification	0.80
Top Level Support	1.20

Scoring rules	
Strongly disagree or don't know	**(4)**
Disagree	**(2)**
Neutral	**0**
Agree	**2**
Strongly agree	**4**

Total Health Check Risk

-14 to -7 Impossible
-6 to 0 High Risk
1 to 7 Medium Risk
8 to 14 Low Risk

Country Branding Project Plan		Resources	
A detailed plan (including critical path, time, schedules, milestones, manpower requirements etc.) can be put together within 6 months for the completion of the project	(2)	There is sufficient manpower to complete the project	4
A detailed budget for the project can be drawn up within a period of 6 months if all stakeholders are engaged.	4	The appropriate technology is available throughout the project lifecycle	(2)
A cross sectional team can be assembled for this project	4	The technology to be used to support the project works and is fully supported	(2)
From the findings of this study, it is clear to all stakeholders what must be done to change the negative image of the country	2	Specific project tasks will be well managed	4
Contingency plans can be put in place in the event of the project being off schedule or off budget	2	Project team members will understand their roles if these are clearly defined from the onset	4

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Ownership	
All stakeholders (government, private sector, significant others) will be given the opportunity to provide input in the project	4
The stakeholders accept ownership of the project actions	2
Conditions of satisfaction will be agreed with all stakeholders. This might prove difficult due to differences in outlook.	2
Stakeholders understand the limitations of the project (what the project is not supposed to do) e.g. FDI and tourist arrivals cannot simple start pouring in.	2
Stakeholders understand which of their requirements are included in the project	2

Justifiable case	
The project has been fully costed and budgets agreed with the sponsors	(4)
Estimates of the financial and commercial value of the project have been made	0
The project promises benefit to the country and a clear return on investment	4
Business measures of success have been identified and measurement processes planned	2
Adequate funding is available for the lifecycle of the project	

Expertise	
All members of the project team possess the appropriate levels of expertise. The country has a wealth of expertise.	4
Owners and users understand the project and are capable of implementing it. A lot of work to be done to bring everyone up to speed.	2
People on the project team understand how their performance will be evaluated. (Drawing individuals from different sectors to work together will be a challenge)	2
Accountabilities for team members have been written, understood and agreed. (Best way of manaing experts from diverse backgrounds)	4
Adequate training (and time for training) is available within the project scope and schedule. This will be the first time Zimbabwe embarks on such a project and training will be required from other countries that have embarked on such projects.	(4)

Clear specification	
The objectives of the project are clear to all stakeholders and members of the project team	4
The goals of the project are in line with country's goals and country standards	2
I am enthusiastic about the chances of success of this project	4
There is adequate documentation of the project requirements and operational performance needs	
An adequate presentation of the project aims and objectives has been given to stakeholders	(2)

Top level support	
The Project Sponsors shares accountability with the project team for ensuring the project's success. All stakeholders agree that a concerted effort is required.	2
Project sponsors will be responsive to requests for additional resources, if the need arises	4
Terms of reference, authority and responsibility levels have been agreed. Sometimes having too many experts is a challenge. Zimbabwe will have to find a tactful way of managing this.	(2)
I am confident I can call upon authorities to help where necessary	4
The Project Sponsors are fully committed to the project's success	4