

Tunisia Branding and Positioning Plan

DRAFT FOR CONSULTATION



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INSPIRING
Tunisia



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Executive Summary

Tunisia is one of the most visited countries in Africa. Its vast coastline, proximity to Europe and year-round pleasant climate has made it a preferred destination for the last 60 years. Before COVID-19, Tunisia received 9.4MM arrivals, registered more than 30MM stays and generated nearly 900 million dollars in tourist expenditure. 67% of visitors came from neighboring Algeria and Libya or were Tunisians living abroad. The country is regarded as a sun and sand destination, which makes the seasonality radically inclined towards the summer months. Tunisia's ONTT (Office National du Tourisme Tunisien) has been working on efforts to diversify the tourism offering in Tunisia, developing the "Inspiring Tunisia" concept and feeding the official digital platforms and written material for the trade with several different tourism products. Given the devastating impacts of COVID-19, an effective Branding and Positioning Plan is required now more than ever to assist with recovery and attracting new markets.

The first step to an effective Branding and Positioning Plan is to build a solid inventory of consumer insights to learn about domestic and international travel trends, customer needs, and what the modern traveler considers desirable in a destination. This is followed by identifying the country's assets that are ready to promote or are potential products and experiences, with further development. The final step is to match the demand and supply understanding, and build a concept, relevant messages, and a communication strategy that creates positive demand for the country.

More than 18MM travelers from top-tier markets visit competing destinations including Morocco, Turkey, and Egypt, and an additional 71MM visit benchmarks Spain, Italy, and Greece. The largest group is in their 30s and 40s and appreciate authentic experiences ranging from history and culture to adventure and immersive experiences.

Tunisia can capture these audiences through marketing cultural explorations, historic and

archaeological experiences, and adventure travel. These products are even more interesting when framed under the two most competitive elements of Tunisia – its off-the-beaten-path nature and the ease of access to all the different destinations within Tunisia.

To successfully increase visitation, Tunisia must capture the attention of key target markets and dispel myths about the destination. The key messages work around geographic location and diversity, how untapped most of these experiences are, the potential for adventure activities, and the rich culture and ancient history of Tunisia.

Yearly campaigns can be developed surrounding domestic tourism, international markets, and one specific for product. The approach is to first tap into the domestic market, given the challenges to international travel from the ongoing COVID-19 pandemic. The goal is to create demand for sustainable products and a loyal following that can continue this trend in post-pandemic years.

The international campaigns should target key markets in four geographic tiers focused on the buyer personas with the greatest likelihood to visit Tunisia:

1. Germany, UK, and France
2. USA and Italy
3. China, Spain, and Russia
4. The Netherlands, Belgium, Bulgaria, and Switzerland

The goals for these campaigns should be awareness, leverage for promotion platforms, lead generation, and establishment of Tunisia as a desirable destination. Public and private participation is key to the success of these campaigns, and execution must involve the use of a wide array of digital tools, modern trade links, and media collaboration.

Introduction

The mission of a Branding and Positioning Plan is to develop the guidelines needed to modulate, add to, and sometimes even change the perception consumers have of a particular product or service. In this case, the goal of Tunisia's Branding and Positioning Plan is to change the perception of Tunisia in the minds of travelers.

The ONTT has been developing efforts in the last seven years to increase awareness for sustainable experiences in Tunisia; the development of this plan is an effort to collaborate with these ongoing initiatives. With the support of the USAID Visit Tunisia Activity, the plan aims to collect information about travelers' needs and future trends in a pandemic year so Tunisia can capitalize on the country's rich natural, cultural, and historical endowments to then debunk myths and promote the best options for targeted audiences. Consultation with the private sector is key to achieving a diversified industry that supports broad-based growth.

A key objective is to enhance Tunisia's competitiveness as a tourism destination. To achieve this, the plan aims to help develop a new, fresh travel motivation-based brand and international communication campaigns to launch and promote high-quality, distinctive, scalable, and sustainable alternative tourism products and experiences – especially in currently less-visited regions and secondary destinations in Tunisia. These will be marketed directly to consumers and through relevant outbound operators worldwide. A special focus will be put on year-round experiences to encourage tourism arrivals beyond the traditional high season.



I. Situation Analysis

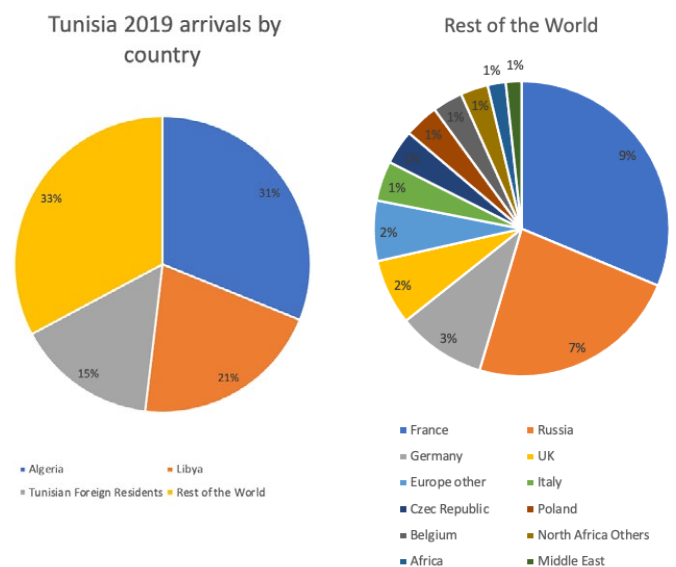


Tunisia's Tourism Industry

Tunisia is among the most visited countries in Africa. Its landscapes, beaches, the Sahara Desert, and the ruins from the ancient Roman and Phoenician civilizations attract millions of tourists each year. Tunisia has been an attractive destination for tourists since the beginning of the 1960s. Among Tunisia's traditional tourist attractions are the cosmopolitan capital city of Tunis, the ancient ruins of Carthage, the Muslim and Jewish quarters of Djerba, and coastal resorts outside Monastir. According to *The New York Times*, Tunisia is "known for its golden beaches, sunny weather, and affordable luxuries."

Until 2019, the industry generated 9.4 million arrivals, more than 30 million stays and nearly 900 million dollars in tourist expenditure. This expenditure accounts for nearly 4% of Tunisia's total imports. In 2019, there were 876 registered hotels in Tunisia, with more than 236,000 available beds, out of which 36% are 4-star, 24% 3-star, 15% 5-star, 10% 2-star, and 3% are 1-star hotels. An additional 2.9% beds are in apart-hotels, 2.5% in holiday villages, and 1.5% are in family pensions. Categories that fall under 1% of the total inventory are guest rooms, time share, hotels of charm, farmhouses, and camps. There are 9,277 beds in unclassified hotels (almost 4% of the total). Additionally, there are 492 Airbnb listings in the country, with a total of 1,790 beds. There are also 380 restaurants registered as touristic restaurants in Tunisia.

67% of tourists in 2019 came from Algeria, Libya, or were Tunisians living abroad. The industry does not regard these travelers as a desired audience because their traveling motivations (i.e. their length of stay and spending) do not align with the leisure travel reality in equivalent destinations. Among the top producer countries in the list are France, Russia, Germany, the UK, Italy, Czech Republic, Poland, and Belgium.



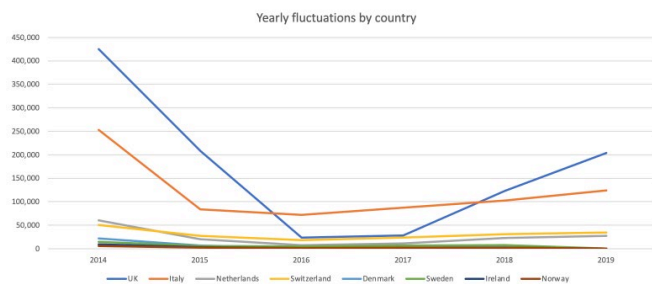
The average stay for foreign travelers is 4.6 nights. Countries with above-average lengths of stay are Germany with 10.3, Russia with 10.2, the UK with 7.9,

Poland and Belgium with 6.9 each, Spain with 6, and Japan, Scandinavia, and the Netherlands with 5.5.

These overnight stays accounted for more than 30 million total nights in 2019, of which 24.3 million nights were recorded for international tourists and 5.7 million nights were generated by domestic tourists. There are 897 monuments and 361 archaeological sites in Tunisia. Nearly a million visits were registered in 2019 to museums and archaeological sites.

The length of stay is clearly higher in the coastal regions of Tunisia, led by Mahdia, Monastir, Djerba, and Nabeul-Hammamet, which are above the national average, followed very closely by Sousse, Yasmine-Hammamet, and Tunis Sud, slightly below. The months of July, August, and September account for nearly 50% of the yearly tourism receipts.

Examining international arrivals into Tunisia for the last six years, source markets such as the UK and Italy are excellent providers of traffic when conditions are favorable. Both countries, after the decline that began in 2015, were already experiencing interesting growth into 2019.



80% of leisure travelers are coming through a travel agent or tour operator. A number of cultural, archaeological, and adventure attractions that normally appeal to the independent traveler are ready to be enjoyed. However, structural flaws may influence travelers to choose other destinations. These include: very few international mainstream airlines providing regular flights into Tunis and province airports; a nearly absent network of convenient, reliable, easy bus or train transportation; a banking system that makes it difficult for key players to execute electronic transactions; and to a lesser extent, a language barrier.

Impact of COVID-19 on Tunisia's Tourism Industry

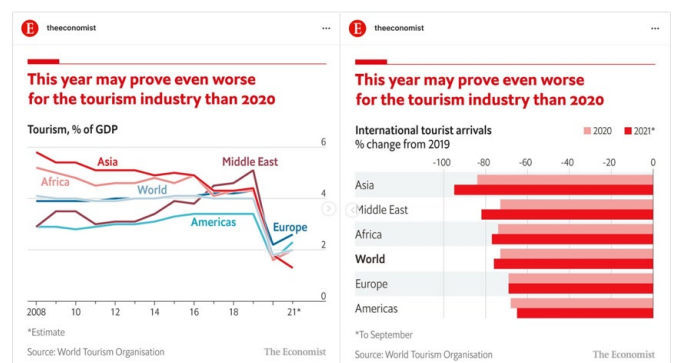
COVID-19 has caused an unprecedented crisis for the worldwide tourism industry. International tourist arrivals plunged between 60 and 80 percent in 2020, and tourism spending is not likely to return to pre-crisis levels until 2024. This puts as many as 120 million

jobs at risk. According to the latest forecast by the UNWTO, the coronavirus pandemic could cost global tourism \$2 trillion in 2021. The same amount was lost in 2020, making it one of the sectors hit hardest by the health crisis.

According to the latest UNWTO data, international tourist arrivals are expected to remain 70–75 percent below 2019 levels in 2021, a similar decline as in 2020.

Although a 58 percent increase in tourist arrivals was registered in July–September of 2021 compared to the same period in 2020, this remained 64 percent below 2019 levels, according to the UNWTO. “Data for the third quarter of 2021 is encouraging,” UNWTO Secretary-General Zurab Pololikashvili said. “However, arrivals are still 76 percent below pre-pandemic levels, and results across the different global regions remain uneven.”

On September 7, 2021, The Economist informed 2021 may be an even worse year for tourism than 2020, taking in consideration overall numbers have been low for all four quarters of the year, while 2020 had a relatively “normal” first quarter. The Americas may be the only region with a stronger performance, while Europe could equal the 2020 performance and all other regions fall below 2020 numbers.



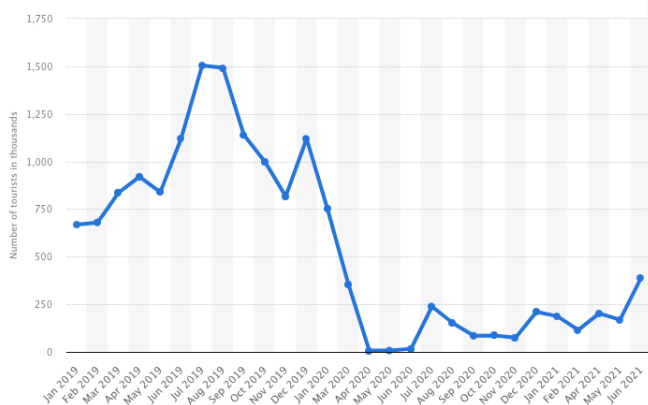
The tourism industry in Tunisia has suffered in the last decade due to the 2011 Revolution, the 2015 terrorist attacks, and the recent coronavirus (COVID-19) 2020 outbreak. Tunisia was hit with a 79% decline in international arrivals in 2020, with a radical 99% decline among Russian visitors and a 94% decline among those from the UK. The other end of the spectrum were the Tunisian international residents, where arrivals fell by 60%.

The dramatic effects of the pandemic are still visible in 2021. Specifically, the global health crisis caused the sharpest fall in the number of inbound tourists, which declined by nearly 100 percent in April 2020 compared to the previous year. The number of tourist arrivals was 79 percent lower in May 2021 than in May 2019. Nearly 388,000 tourists entered Tunisia from



abroad in June 2021. In September 2020, Tunisia counted only 84,600 international tourists compared to over 1.1 million in the same month of the previous year. Tourism receipts in the country also declined substantially in the same period.

Number of international tourists arriving in Tunisia from January 2019 to June 2021



Tunisia Current Positioning and Branding Efforts

Tunisia is currently positioned as a sun and sand destination. Even when there is general knowledge about the cultural, archaeological, and active assets of the country, visitation numbers indicate general audiences choose to travel to this destination mainly to enjoy a beach vacation.

Tunisia's brand development has seen some changes in the past. Before 2016, the "Discover Tunisia" message was introduced. This image uses a blue and white logo, reminiscent of a sea destination, and lettering for the logo was created with slight references to Arabic calligraphy.

In 2017, the strategy changed to a more modern and traveler-oriented "Inspiring Tunisia" message. A slightly different color scheme was added to its palette and used the same lettering for the logo.

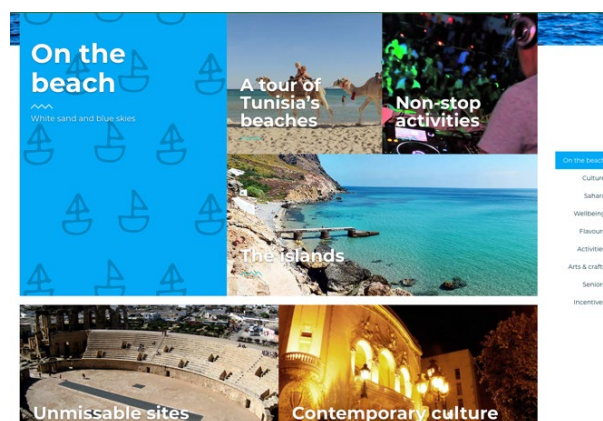
Tunisia's official promotion Facebook page is listed as "Discover Tunisia," with the white and blue logo as its profile picture. On Tunisia's fanpage, the new logo and message can be found in some of the photos as a graphic element. This page has more than 502,000 followers and fresh content is added almost daily. There is an "Inspiring Tunisia" profile on Facebook, belonging to a travel agency. This agency has less than 600 followers.



On the website, the "Inspiring Tunisia" message and logo is widely used, hosted in the discoverTunisia.com domain name. The website is available in 10 languages including Arabic, French, English, Italian, German, Chinese, Czech, Polish, and Spanish.

The first item in the upper menu links to a promotional video with a version in English, Swedish, and Danish. It has a specific landing page (which opens a new tab) and displays a highlighted message saying, "It's time for Tunisia." The video features a family with pre-teen children enjoying a list of attractions which are then described below, each with a landing page of their own. In reading order: Golfing, All inclusive, *Star Wars*, Watersports, Scuba diving, Adventure, Family holidays, Food, Family adventures, Shopping, Kids activities, Luxury travel, Mediterranean sun, Nightlife, Sun and Beach, Essential checklist, and a final links page, with links to UK tour operators' websites, OTAs, and airline sites.

The second item links to a list of destinations in the country. There is a third item that lists the different attractions available in all four seasons, a media center, and a list of events. The homepage itself features a list of attractions classified in scrolling order: On the beach, Culture, Sahara, Wellbeing, Flavours, Activities, Arts & crafts, Seniors, and Incentives.





A specific campaign for domestic tourism was launched on Dec 16, 2021. A Facebook profile was created, with the name of the campaign, “Tounes Lik,” hosted in Arabic and English. 3,700 people follow this fanpage.



This campaign aims to promote Tunisia internally to a “bon vivant” type of traveler, who has not been able to travel to their preferred destinations for well over a year. The plan is to promote Tunisia as more than a “monoproduct” country, to families, couples, and small groups. The logo was designed using different colors in four quadrants

to promote the four different assets of the country: “Terre, Mer, Pierre, and Desert.” The deployment will

be mostly digital and a list of 45 potential destinations to push has been made. Video, panels, radio, and influencers are in the promotion plan. Multi-platform follow-up will be comprised of a website, social media, and a mobile app. For now, the website is still under construction.

SWOT Analysis

Even when Tunisia has a rich diversity of natural, cultural, and historical resources, general audiences still regard it as a beach destination. The Tunisia brand should benefit from the country’s friendly image and capitalize on being so close to Europe, its diverse offerings, and already having a steady flow of travelers who can extend their trip.

Analysis suggests there may be opportunities in promoting sustainable adventure activities and film sites, but always supported by the unique quality of being a small country with most regions very accessible and having an overall off-the-beaten-path characteristic to it.

SWOT Analysis Table

Strengths

- › Geographic diversity
- › Small country area makes it easy to explore the vastly different landscapes from north to south
- › Hospitable, welcoming
- › Diverse product offerings
- › Off the beaten path

Opportunities

- › Rich history/archaeology
- › Artists/artisans
- › Wide array of music/cultural festivals
- › Filming locations for *Star Wars*, *Indiana Jones*
- › Adventure travel (Sahara Desert, mountain trekking, etc.)
- › Access to fresh, locally-grown foods

Weaknesses

- › Largely unknown as a global destination
- › Limited airport access/expensive flights
- › Lack of digital presence/marketing materials
- › Challenging for independent visitors to get around Tunisia
- › Marketing/promotion is segmented/siloed

Threats

- › Trash/pollution
- › Lack of funding
- › Lack of unified national messaging platform/strategy
- › Perception that Tunisia is unsafe
- › Strong marketing/messaging campaigns from well-known global competitor destinations like Morocco and Turkey

II. Market Research

Travelers go through a process when planning a trip that begins with inspiration, or a stimulus that makes them dream with their next vacation. The next phase is seeking out information, mostly digital, about different destinations, connections, time, accommodations, experiences available, and topics specific to their travel segment. The next step is booking their vacation, or part of it. Then they prepare for the trip. The holiday itself is not the last step in this process, since they will proceed with sharing their experiences and reviewing them, which is normally the first step for their next inspiration.

Two surveys were conducted to build the profiles of key target markets to Tunisia. In November and December of 2021, an international survey was conducted with the objective of determining the needs, preferences, and trends among international travelers with a possible intention and ability to travel to Tunisia. Additionally, in November 2021, a national survey was conducted to determine behavior, challenges, preferences, and general statistics of the Tunisian domestic traveler.

Competition and Benchmarks

A competition analysis was conducted among six countries, in two different tiers: countries in the first tier are considered direct competitors, and include Morocco, Egypt, and Turkey. The criteria behind this choice is similar access to international markets,

times of travel, border logistics, similar weather, a combination of natural, cultural, and historic assets, security profile, and an image of being exotic but nonetheless close to Europe.

The second tier includes countries that share some common touristic assets with Tunisia, including a Mediterranean coast and a rich culture and history, but are more advanced in terms of touristic promotion and show a different set of results in several dimensions. Countries in this tier are Greece, Italy, and Spain.

All competitor countries share the Mediterranean coast, which provides travelers with an interesting choice of combining a beach vacation with archaeological and cultural attractions. The two interesting elements Tunisia does not share with its competitors are 1) it's a small country and all assets are easily accessible in a single trip, and 2) most of Tunisia's attractions are untapped and far less known, where travelers can explore without the stress they might find in other destinations. More detailed information can be found in Annex 1.

International Travelers

With billions of travelers, the global market is too large and diverse to reach effectively as a whole. Therefore, segmentation is a key marketing tool to better understand consumers and allocate promotional

budgets effectively. The segmentation conducted and described in this section was based upon extensive quantitative research of 1,082 valid survey responses.

The survey was open to travelers over the age of 18 who had taken an international trip during the past two years to gather inputs about their behaviors and preferences. Specific countries were targeted for responses including the USA, Russia, China, the UK, France, Spain, Italy, Germany, Australia, New Zealand, Sweden, Norway, and Finland.

Responses on travel behaviors and preferences were analyzed through a powerful statistical software and algorithm to group respondents together based upon shared characteristics. With the segments identified, a clear picture of the personas can be made, their likelihood to travel to Tunisia, countries of residence, what sorts of activities they are most interested in, and their potential revenue potential for the country.

The table below shows the number of surveys taken of the different nationalities, the post-stratification weighted population, so it represents overall population and how much they represent in outbound tourism. All calculations used bootstrapping to lower the margin of error for each segment's result to 3% or less.

Countries	N	PS Population	%	Outbound Tourism	%
USA	214	281,220,451	4.8%	90,000,000	16.8%
Russia	86	154,261,879	2.6%	45,000,000	8.4%
China	86	5,071,518,333	87.0%	150,000,000	28.0%
UK	85	150,048,274	2.6%	93,000,000	17.4%
France	85	46,539,959	0.8%	30,000,000	5.6%
Spain	85	22,224,078	0.4%	20,000,000	3.7%
Italy	84	50,892,843	0.9%	35,000,000	6.5%
Germany	85	23,895,152	0.4%	12,000,000	2.2%
Australia	85	6,908,930	0.1%	11,400,000	2.1%
New Zealand	86	362,482	0.0%	3,200,000	0.6%
Sueden/Norway/Finland	84	23,299,623	0.4%	46,000,000	8.6%
	1082	5,831,172,005	100.0%	535,600,000	100.0%

Survey participants were asked for the destinations visited in the last two years. Tunisia ranked 83rd. Based on the total outbound traveler population of 535.6MM, this accounts for a low estimate of 1.6MM travelers.

Top 10 visited destinations in past 2 years	
Destinations	%
1 Italy	8.3%
2 United States of America	6.8%
3 Australia	6.2%
4 Spain	5.8%
5 France	5.0%
6 Germany	4.8%
7 Japan	3.7%
8 Portugal	3.3%
9 United Kingdom	3.3%
10 Greece	3.3%
83 Tunisia	0.3%

The average spending per person was 623 euros, and their average length of stay was 8.41 days. 54.7% of

respondents chose to travel in the summer during their last trip. When asked about their source of inspiration for travel planning, almost 20% of them mentioned the influence of friends and/or family through direct contact. If online searches are added, online articles and videos, travel review sites, and friends and/or family through social media, the five sources account for more than 50% of inspiration sources. Social media accounts for only 4.2%, and in this category 75% of influence is provided by Facebook, Instagram, YouTube and TikTok.

65% of travelers booked their entire trip directly with each service provider. 20% did so with the help of a local tour operator, and 10% did a mixed booking. When asked where their next trip was going to be, 4.1% mentioned Africa, and within that group Tunisia ranked third after Egypt and Morocco, with a 7.3% intention.

Domestic Tourism

In the specific context of 2022 Tunisia, domestic tourism becomes a particularly interesting market. If Tunisian travelers can learn about the many sustainable tourist products they can enjoy in their country, this can spark a new way of generating traffic, like in successful destinations such as Spain, France, or Italy. Two surveys were conducted to gather the relevant data about market size, behavior, and general preferences.

Domestic travelers around the world have found in this activity a viable and interesting alternative to the international trips they have not been able to take in a pandemic year. For the industry, it is more than a source of supplementary revenue. If correctly promoted, it can become a steady source of income in post-pandemic years.

In 2019, domestic tourism in Africa accounted for 55% of the continent's travel and tourism spending. Lower than Europe (64%), Asia-Pacific (74%) and North America (83%). In 2021 in Africa, a 39.5% growth in domestic travel and tourism GDP is projected. International growth has a projection of only 26.1%.

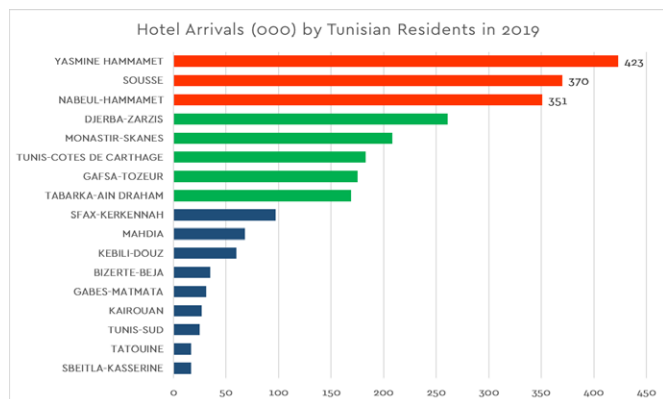
Arrivées globales des hôtels
2017-2019
(En milliers d'arrivées)

	2017	2018	2019	TCAM
Non résidents	2 816	3 822	4 482	26,2%
Tunisiens résidents	2 702	2 567	2 517	-3,5%
Tunisiens non résidents	48	49	60	11,9%
Total	5 518	6 389	6 999	12,6%

Nombre de nuitées en milliers
2017-2019

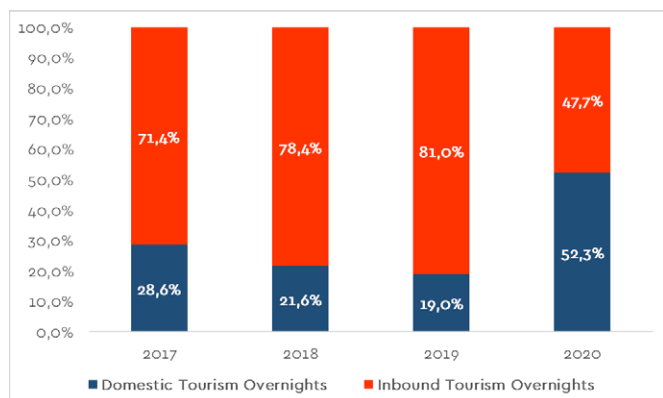
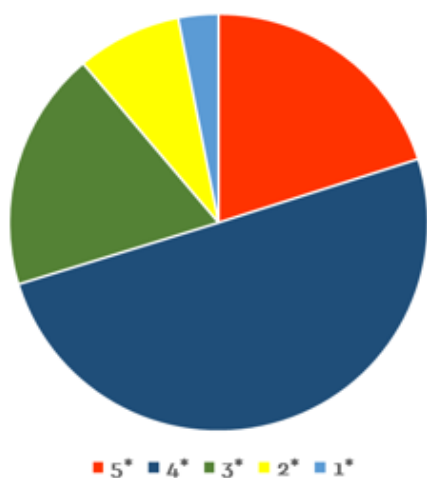
	2017	2018	2019	TCAM
Non résidents	15 728	21 212	24 304	24,3%
Tunisiens résidents	6 236	5 765	5 598	-5,3%
Tunisiens non résidents	78	97	116	21,7%
Total	22 043	27 075	30 019	16,7%

Before the pandemic, domestic tourism in Tunisia saw a moderate decrease in hotel arrivals and overnights. In 2019, hotels in eight regions welcomed more than 150,000 Tunisian residents. Northeast destinations were in the top positions, both before and during the pandemic. More than 3 out of every 4 hotel overnights by domestic tourists were registered in coastal areas.



In 2019, 7 out of every 10 hotel overnights by Tunisian residents were registered in 4-star and 5-star hotels. 62% of residents prefer to stay in a hotel for their vacation. Domestic tourism in Tunisia counted for more than half hotel overnights in 2020.

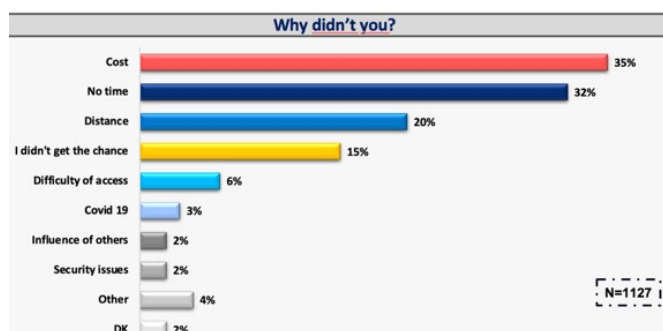
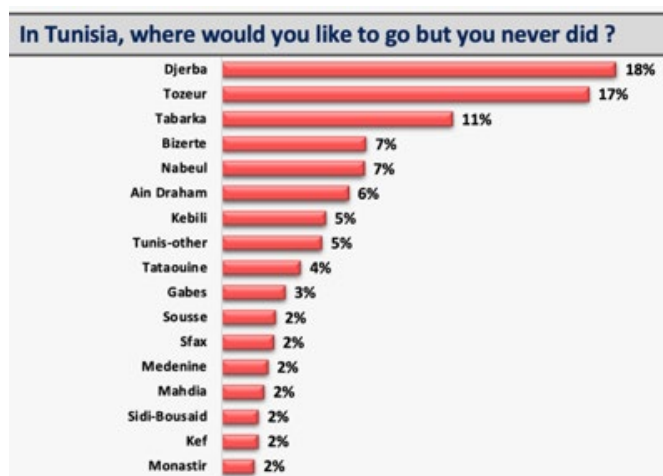
Hotel Overnights by Tunisian Resident by Hotel Category (2019)



The main findings of the national survey were:

- 3 out of every 4 people have taken a domestic trip in the last 3 years.
- 2 out of every 3 of those who say they have not, say it was for economic reasons.
- 53% of those who have traveled are between 25 and 49 years old. 62% of those who have not are between 35 and 65 years old.
- Over 60% of travelers say they have traveled 2 or more times per year.
- Only 11% of travelers say they travel alone.
- 80% say they feel safe when they travel in Tunisia
- Only 19% claim they travel domestically as an alternative during Covid year.
- 3 out of every 4 travelers spent at least one night in their last vacation, 27% of them did it for 2–6 nights. When asked how many nights they *often* stay, the figure goes up to 81%.
- 47% prefer beach activities, but when asked what new activities they would like to try, 37% say sports activities.
- 42% stayed at a house rental in their last trip.
- Satisfaction rates are overall high, with guest houses the highest with 96% satisfied or totally satisfied, 95% for camping, 89% for house rentals, and 87% for hotels.
- 51% travelers reach their destination in their personal car.
- When asked where they *prefer* to spend the night, 62% said in a hotel.
- 45% spend less than 100DT per day in a trip, 42% between 100 and 300DT. 38% of these expenses are food and beverage. 94% travelers pay in cash.
- 75% own a mobile phone, 80% have internet access, and 90% of these use their mobile phones to access the internet. Less than 10% use desktop or laptop computers or their TVs.
- 92% have a Facebook account, 50% Instagram, and 33% TikTok.
- 44% find out about destinations and offers from media, out of which 80% is social media, and 97% of this is Facebook.
- 61% go through the planning process on their own. 11% use a travel agency.

The northeast coastal destinations are the preferred choice, but when asked where you would like to go but never did, destinations like Tozeur received a 17% intention. Cost, time, and distance are the main reasons.



Tunisia can benefit from domestic traffic that finds opportunities to organize a trip to sought-after destinations like Tozeur and Tabarka, accessing incentives or helpful information on Facebook, and can find ways to optimize their budget, like chartered land transportation.

Three different segments can be identified in the Tunisian market: families, couples, and small groups

of young travelers. Families are the primary target that seek to entertain their children and find a space to rest. Composed of various age groups, they will look for a complete solution at the best price. A solution that can satisfy parents and especially connected and much more demanding children. These children are aged 6 to 18. Their goal is to book a 4- to 5-star property, but also adopt new trends such as guest houses. Their objectives are to get new experiences, discover nature, share memorable moments together, seeing children flourish happily and in a secure fashion. Preferred activities are acquiring new acquaintances or new friends for their children. The decision is usually made by the mother, although recently, children are increasingly involved.

The second target is young couples (without children) who are enjoying the first years of their union, an informed segment who carefully chooses their destination and who use the internet heavily for this process. They have different interests, are moved by social media, and always look for the right price/quality ratio, while aspiring to a product as high-end as possible. They have significant purchasing power and consume average hotels, charming hotels, and guest houses. Preferred activities are new thalasso and spa experiences and gastronomy.

Our last target will be young travelers. This segment seeks to live life to its fullest. A target that favors traveling in "packs," for whom tourism only makes sense in a group. This target will opt for a product that is out of the ordinary, with a good share of discovery and surprise. Most of them are Generation Y (18–35 years old) and very much adapted to global crises, unemployment, globalization, and mobility. Holidays are a must for their lifestyle and social networks their main source of inspiration. Demanding in terms of quality/price ratio, their group travel seeks adventure, discovery tourism, cycling, and hiking. They always share their experiences.



III. Tunisia Tourism Product



Geographical regions

Tunisia is a geographically diverse country. It is the northernmost country of Africa and the smallest country in the Maghreb region. Tunisia boasts the eastern part of the Atlas Mountains as well as the northern end of the Sahara Desert's Grand Erg Oriental, a 600km-wide field of sand dunes that stretches into neighboring Algeria. Tunisia has a 1,300 km coastline, right at the junction of the eastern and western parts of the Mediterranean basin. The climate varies across the regions, and the northern region has low hills and plains. The Sahel features broadening coastal plains along the eastern Mediterranean coast and is considered among the best places in the world for olive tree cultivation. Calcareous mountains and plateaus, dry forest, and the Sahara Desert provide a wide array of landscapes, climates, and scenery. The dry weather and mostly flat land make it easy to maintain a network of high-quality tarmac roads that connect all the different provinces.

Tunisia's Tourism Assets

Tunisia is also a historically and culturally diverse country. Due to its strategic location, civilizations in the last 3,000 years have established ports and cities in Tunisian territories, from the Tyrian Phoenicians who founded Carthage, to the Romans who took over and the Byzantine Empire, which later fell under Islamic rule. The Amazigh culture existed across the

Tunisian territory since before the arrival of these civilizations and is present even today. The later French protectorate and extensive Italian immigration during colonial times added an additional ingredient to the Tunisian melting pot of cultures.

Tunisian people are open and friendly to visitors. A great number of them lead simple lives the same way their ancestors did hundreds of years ago and are happy to share these lifestyles in an authentic manner. Tunisia is an off-the-beaten-path destination. No crowds, no alienation, no prefabricated experiences, no exaggerated restrictions. Tunisia is a destination high on authenticity.

Touristic products in Tunisia can be classified as follows:

Adventure: With an interesting geographic diversity and the quality of being an exotic destination, adventure travelers can find in Tunisia a place to slightly step out of their comfort zone and find discovery and exploration. Trekkers and bicyclists can roam the Jugurtha rock formations and connect the lines between the oases of Tozeur. An immersive Amazigh culture experience can be had at Gabes or Tataouine, staying in their cave dwellings, eating their food, and even roaming the Sahara on their camels.

Archaeological: With more than 360 archaeological sites available, including no less than seven UNESCO Cultural World Heritage Sites, Tunisia is an ideal destination for the history lover. Not only are these sites in good condition, but they can be visited in a relaxed fashion, away from crowds that normally roam equivalent sites in other parts of the world. Carthage, Kerkouane, Dougga, El Djem, Bulla Regia, Chemtou, Maktar, Sbitla, and Oudhna are only a few examples of sites across the country. Most of these sites are complemented with museums, some of them with world-class infrastructure.

Beach: White sand, blue ocean, all-inclusive properties, the current sun and sand product should be the gateway to more sophisticated, sustainable products available in Tunisia.

Cultural: The multi-cultural historical influences on the people of Tunisia have created a showcase of traditions, crafts, food, and ways of life that the modern traveler finds fascinating. Medinas and souks can be found in Kairouan, Tunis, Sousse, Djerba, and many other cities, featuring pottery, tapestries, traditional clothing, perfumes, and spices. Street markets always come with street food that more and more visitors are willing to try and enjoy.

Natural: An extensive coastline, nine national parks, 15 natural reserves, 22 nature sites, two marine reserves, and five wildlife reserves make Tunisia a very interesting destination for the nature lover. If we add the geological diversity, the many climates and fantastic landscapes, travelers can enjoy places like Tabarka, Bizerte, Tozeur, and Matmata.

Religious: Tunisia is home to the fourth holiest site in Islam (Kairouan) as well as Africa's oldest synagogue (El Ghriba in Djerba). Both of these locations are the site of modern pilgrimages and also have the potential to attract a large number of tourists interested in the religious history of the Tunisian people.

Sahara: Easy access to the desert provides fascinating landscapes, dune-dwelling adventures, cultural immersions in a single, focused product. Tunisia offers some of the quickest access to the Sahara Desert for European overlanders, with regular ferry connections to France and Italy, making it possible to drive a 4x4 from Rome into the Grand Erg Oriental in less than 48 hours.

Sports: With an extensive coastline, water sports are a must in Tunisia, but with the modern advent of adventure sports, the varied Tunisian geography has the potential to become a sought-after hub for long-

distance disciplines, multi-sport explorations, or even entry-level experiences.

Star Wars: More than 10 film sites across Tunisia, some of them in very good shape, provide an open door to film fans all over the world to explore the history of the filming, local influence in the final movies, re-enactment, immersive stays, and screening sessions.

World War II: As a result of the Allied invasion of North Africa during World War II, Tunisia was the site of extensive fighting between November 1942 and May 1943. Military history enthusiasts can retrace the steps of the invading force via a string of Commonwealth, US, Italian, and German military cemeteries, as well as visiting famous battlefields. In the south of the country, it is possible to tour the well-preserved fortifications of the Mareth Line, than run from the Matmata Hills down to the excellent military museum in Mareth town.

Circuits

Understanding the different types of travelers who will be drawn to the destination, this section illustrates geographic areas within Tunisia that offer fitting products for the expectations of these specific travelers.

Land transportation is still the best way to explore Tunisia. Considering the distances between the many different attractions, the time of travel, and general traveler interest, sample trips from the capital Tunis can include:

Day Trips:

- › **Bizerte:** Ichkeul for nature lovers, 3-hour drive RT; Sidi Mechreg for adventure sports, 5-hour drive RT
- › **Tabarka:** Bulla Regia and Chemtou archaeological sites and museum for history enthusiasts, 5-hour drive RT
- › **Mahdia:** El Jem Roman amphitheater for history enthusiasts, 5-hour drive RT
- › **World War II:**
 - › *Driving eastwards from Tabarka to Tunis:* Tabarka - Ras Rajel, Thibar, Beja, Oued Zarga, Medjez-el-Bab, Massicault (all Commonwealth)
 - › *Within Tunis:* Carthage (North Africa American Cemetery), Gammarth (French War Cemetery), Borgel (Jewish Cemetery)
 - › *Driving south from Tunis:* Borj Cedria (German), Takrouna (French War Cemetery + Italian War Cemetery), Enfidaville (Commonwealth)

Combinations:

- ▶ **Nature:** Bizerte, El Kef, Tozeur, Douz, 14:45 hours total driving time, 5D/4N; Ichkeul National Park, Sidi Mechreg Ecorand, Jugurtha mountainous site, Chebika, Tamaghza, and Mides oases and canyon, Sahara experience
- ▶ **Archaeology:** Tabarka, Dougga, Sbeitla, Mahdia, 12:15 hours total driving time, 5D/4N; Bulla Regia and Chemtou archaeological sites and museum, Maktar archaeological site and Kessra museum, Sbeitla archaeological site, and El Djem Roman amphitheater
- ▶ **Culture:** Kairouan, Tozeur, Douz, Tataouine, Gabes, over 20 hours driving time 6D/5N; Kairouan medina and workshops, Nefta Souk, Douz Festival, Tamezret Amazigh Museum, Chenini and Djouret Amazigh villages
- ▶ **Adventure Sports:** Bizerte, El Kef, Tozeur, Mahdia
 - ▶ 2-day trips can be taken to Bizerte, where mountain biking, hiking, and diving can be enjoyed along or inside its spectacular coast – 5 hours total driving time
 - ▶ 2-day trips can also be taken to Table de Jugurtha, in El Kef, for rock climbing, mountain biking, trekking, or paragliding – 7:30 hours total driving time
 - ▶ 3-day trips can also be taken into Tozeur, where trekkers and mountain bikers can do the routes that connect the Chebika, Tamaghza, and Mides oases, and even run the length of the canyon to its source – 13 hours total driving time
 - ▶ A 2-day trip into the Kebili/Douz region allows for motorsport enthusiasts to have a 4x4 Sahara experience in the middle of the desert – 11:40 total driving time
- ▶ **Star Wars:** Tozeur, Tataouine, Djerba. A straight drive to the area around Tozeur takes us to *Star Wars* Canyon (where scenes from *Indiana Jones* were also filmed), along with Mos Espa; slightly further west by Nefta one can visit the iconic Lars family homestead on Chott el Djerid, then drive eastwards to Tataouine for a visit to Ksar Hadada; finally, a stop in Djerba takes us to two sites for fanatics only – 4D/3N, over 20 hours drive time



Finally, the average traveler will appreciate a circuit that lets them experience the best Tunisia has to offer in the time they decide to dedicate to their holiday. Traditional beachgoers can extend their resort vacation and take day trips like the ones suggested above so they have a richer experience and stay in the country for longer. For example, travelers who come for a full experience can combine Bizerte, Tabarka, El Kef, Dougga, Kairouan, and Sbeitla in a 6-day/5-night itinerary that showcases nature, history, archaeology, culture, and soft adventure. More adventurous travelers can combine Tozeur, Douz, Gabes, Matmata, Tataouine, and Mahdia for a 6-day/5-night itinerary that combines adventure, nature, film sites, culture, and history.



IV. Target Markets And Segments

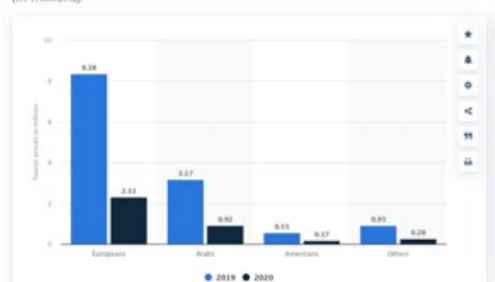


Establishing target markets is an effective way to optimize communication, advertising, trade, and community-building efforts. Geographical location is the base, since proximity marks the connections, travel time, and logistic ease that makes a destination attractive, but demographic and psychographic criteria must be taken into consideration as well. The criteria for building a base of target markets were first, travelers who have traditionally visited Tunisia in the past, and secondly, the six countries identified as competitors and benchmarks and their client markets. Distribution looks like this:

Morocco			Turkey			Greece			Italy (2018)			Spain (2018)		
Moroccan Foreign Residents	46%	6,026,000	Russia	14%	7,017,657	Germany	13%	4,026,286	Germany	19%	12,184,502	UK	22%	18,502,722
France	15%	1,965,000	Germany	10%	5,027,472	Bulgaria	12%	3,882,890	USA	9%	5,656,740	Germany	14%	11,414,481
Spain	7%	917,000	Bulgaria	5%	2,713,464	UK	11%	3,499,325	France	7%	4,737,464	France	14%	11,343,649
UK	4%	524,000	UK	5%	2,562,064	Italy	5%	1,553,172	UK	6%	3,781,882	Italy	5%	4,382,503
Germany	3%	393,000	Iran	4%	2,102,890	France	5%	1,541,793	China	5%	3,200,847	Netherlands	5%	3,848,545
Italy	3%	393,000	Georgia	4%	1,995,254	Romania	4%	1,378,127	Switzerland	5%	2,925,321	USA	4%	2,949,710
USA	3%	393,000	Ukraine	3%	1,547,996	USA	4%	1,178,988	Austria	4%	2,612,706	Belgium	3%	2,500,278
Belgium	2%	262,000	Iraq	3%	1,374,896	Turkey	3%	1,093,302	Netherlands	3%	2,197,870	Portugal	3%	2,346,405
Netherlands	2%	262,000	Netherlands	2%	1,117,290	Serbia	3%	1,027,288	Spain	3%	2,175,267	Ireland	2%	2,049,272
Maghreb	2%	262,000	Azerbaijan	2%	901,723	Albania	3%	944,489	Russia	3%	1,616,902	Switzerland	2%	1,884,783
Scandinavia	1%	131,000	Poland	2%	880,839				Poland	2%	1,472,832	Russia	1%	1,222,426
China	1%	131,000	France	2%	875,957				Belgium	2%	1,270,802	Argentina	1%	714,774

Not all information was equally available for all countries. Some of the official information was only compiled until 2018, and some countries like Egypt will only have tourist arrivals by region. Data was compared to partially available information, like articles on the press, tweets made by official agencies, and ministry public statements for accuracy.

Number of tourist arrivals in Egypt in 2019 and 2020, by region (in millions)



Target Markets

Countries consistently appearing in the top-10 lists of international arrivals to each country were first marked as priorities – these are Germany, France, and the UK. This is followed by countries present in four lists, like the USA and Netherlands. A third tier includes Italy and Belgium, and a final level for Bulgaria, Switzerland, China, Spain, Russia, and Poland.

Germany	33,045,741
UK	28,869,993
France	20,463,863
USA	10,178,438
Netherlands	7,425,705
Italy	6,328,675
Belgium	4,033,080
Bulgaria	6,596,354
Switzerland	4,810,104
China	3,331,847
Spain	3,092,267
Russia	2,839,328
Poland	2,353,671

After consolidating these rankings, the total number of travelers produced by these countries combined are: Germany, UK, and France are still in the top three positions, with a combined total of 82.3MM travelers produced. The second tier with USA and the Netherlands produced a total of 17.6MM travelers. Countries like Italy and Belgium produce travelers for more destinations, but a combined 10.3MM in total numbers, while Bulgaria and Switzerland are only ranked in two countries but produce a combined 11.4MM travelers. The last four countries in the consolidated list are China, Spain, Russia, and Poland, with a total 11.6MM travelers.

The numbers in this matrix, matched with the psychographic results of the International Travelers survey provide the geographic areas to focus on when promoting Tunisia abroad (in priority order):

1. **Germany, UK, and France**
2. **USA and Italy**
3. **China, Spain, and Russia**
4. **The Netherlands, Belgium, Bulgaria, and Switzerland**

Additionally, special care will be taken in promoting Tunisia internally for domestic tourism towards the end of 2021.

Target Segments

Psychographic segments

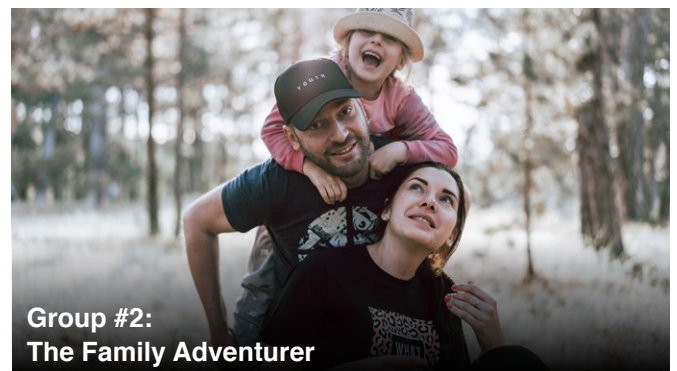
Based on the collected survey data, five different groups of travelers have been identified with similarities among data sets such as demographic, psychographic, geographic, and behavioral features. A persona has been created for each group, out of which the first three are highly recommended targets, and the next two are secondary potential targets.

Those that are recommended with high potential for Tunisia have been associated with unique buyer personas of the type of travelers Tunisia should target and attract. These buyer personas are semi-fictional descriptions to help bring the ideal customer to life. The group names and corresponding images allow those responsible for marketing to clearly visualize the person Tunisia is trying to attract.

For each persona, it is important that the data be reviewed as an average representing the segment. For example, not all segments are 100% women, but if the majority of the segment is composed of women, then the segment will have the persona of a woman. This is similar for all the other variables presented. Thus, in the end the persona is a bundle of variables most likely to be found within the segment. These leaning variables will allow marketing messages about Tunisia to be directed as efficiently as possible toward the segment.



This target is primarily an upper middle-class man in his 40s. He lives with his wife in a large city. He has kids but tends not to bring them on vacation abroad. He prefers to enjoy festivals and a little adventure on his own. He is a trekker and loves to be in nature. He knows about Tunisia from having done research online or from his educational background. He finds Tunisia appealing. He tends to spend an above-average amount when on overseas trips. He is most likely to live in Germany, France, China, Spain, Russia, the Netherlands, Belgium, Bulgaria, or Switzerland.

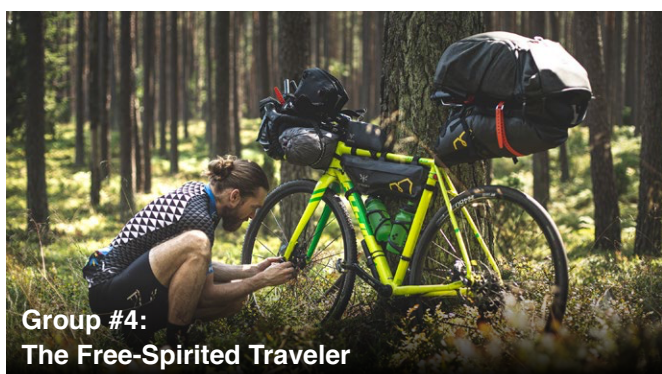


This target is primarily a middle-class woman in her mid-30s. She is married and has young kids. She lives

in a large city and is highly educated. She is quite independent, enjoys historical sites, walking tours, museums, and a little family adventure. Educational programs incorporating food, crafts, and local culture would be perfect for her. She knows about Tunisia from media and personal research and finds it appealing. Most likely to live in the UK, Italy Spain, or the Netherlands.

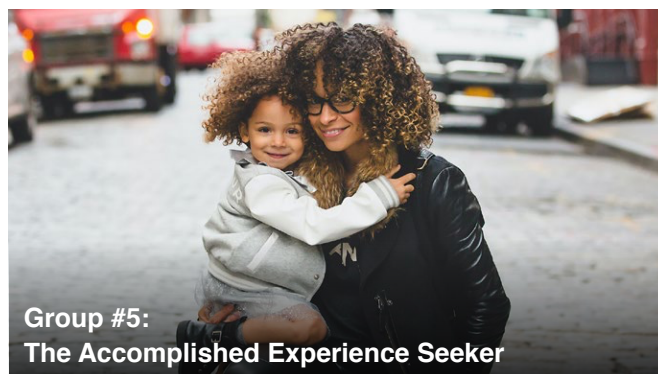


This target is primarily an upper middle-class man in his 40s. He travels with his wife, but without his kids. He is highly educated and lives in a large city. He enjoys luxury trips and has the means to stay in top-notch properties. He would enjoy packages including rugged educational day excursions. He enjoys historical sites, cultural events, festivals, walking tours, and doesn't mind the touristy experience. If traveling with kids, he might seek a resort that would allow him and his partner to enjoy solo/couple adventures while the kids are entertained. He is very knowledgeable about Tunisia and is the most likely to speak Arabic among all of the target personas. A frequent traveler for business, he would plan a vacation adjacent to a business trip or event. He lives an active life and is quite independent. He is most likely to live in the UK, Spain, Russia, Belgium, Bulgaria, or Switzerland.



This target is primarily a middle-class single man in his 30s. He is between jobs and lives in a small city or the suburbs. He enjoys a low-cost trip on his own which might include staying at an all-inclusive singles resort. He would enjoy road cycling tours in the countryside with stops at lodges. He knows about Tunisia and finds it appealing. He enjoys wine tours and festivals, but also cultural aspects. He is most likely to live in

Germany, the USA, Italy, the Netherlands, Bulgaria, or Switzerland.



This target is primarily an upper middle-class woman in her mid 30s who is the head of a family. She lives in a large city and is highly educated. She might have roots in Tunisia. She tends to travel as a couple or as a family. She needs to stay active in social media. She enjoys luxury trips, possibly bundled with a business conference or event. She enjoys historical sites, festivals, and cultural events. She is motivated by accomplishing something, even when on vacation. This would likely be an adventurous activity and/or in nature. She knows quite a lot about Tunisia and has the destination on her list. She is most likely to live in France, China, or Belgium.

Monetization and Potential Impact: The total market size for these five segments combined is over 452MM travelers. Their average intention to plan a next trip to the Middle East or Africa is 8% on average. Their specific interest to put Tunisia in their list is an average 58%, and the match with the activities available in Tunisia is an average 5%. Multiplying these three factors, the result is an average 1.14% of the total market with a high potential to visit Tunisia in the near future. The projected demand for these specific segments is a little over a million travelers, which increases to 1.5MM if they choose to travel adding a spouse. With a US\$623 average spend per person, the projected total revenue is over a billion dollars. A 10% penetration among the target markets would potentially yield over US\$100MM in revenue for the country.



General Interest Segments

When the above targeted segments start the trip planning journey, they will search for information using a wide range of platforms, focusing on their general interest for a trip. Mainstream travelers will probably look for information on access or services, from where they fall on more specific topics like length of stay and itinerary. More focused travelers will search and decide depending on the opportunities the destination provides for things like nature observation, archaeological sites, film locations, or sports opportunities and conditions. The following travel segments can match the Tunisian offer:

Leisure

The largest and more mainstream segment, international leisure travelers will be more prone to rely on the help of a travel agency for planning and booking their trip to Tunisia. Their main motivation will be closer to what Tunisia means right now in the minds of the consumer, which is an affordable beach destination. The most interesting sub-segment in the leisure group would be the independent travelers, who will be interested in booking parts or all their trip directly with each service provider, in some cases at the last minute. These travelers will be interested in adding extra days to their trip if they find interesting cultural, archaeological, or historical assets in the country. Leisure travelers also adopt modes when they travel. Depending on that, they will choose different levels of involvement, contact, and variety of activities. People in discovery mode may choose to add more remote destinations to their trip. People in escape mode may choose a trip as different as possible from their day-to-day reality. People in transformation mode will choose activities that impact them as a person rather than just entertain them.

Special Interest

Special interest travelers will switch their attention towards a product different than the main product the destination is known for and plan their trip around that rather than making it an extension. Tunisia can become a serious player in the adventure travel scene, given its varied geography and relatively easy access. Tunisia has all the assets to welcome history and archaeology fanatics, given its 3,000 years of incredibly varied history and its sites in great condition. Cultural travelers can find a wide array of festivals yearlong, all over the country.

Sports

Performing sports activities in appealing destinations has become an interesting travel segment worldwide. Trail running, ultra-running, multi-sport adventure races, triathlon, open-water swimming, cross-country biking, and rally racing have become big events that attract visitors from all over the world, require logistics,



have an audience, and of course, bring athletes and their families as visitors for many days.

Film

Although there have been several mainstream films shot in Tunisia, maybe the most important and relevant for travel is *Star Wars*. The number of fans worldwide is significant, and promoting visits to film sites has great potential. Hyperspace, the official webpage of the fan club hosts 385,000 communities, with 50 million pages of information shared among the more than 13 million hardcore fans who invest serious time and money in events, memorabilia, cosplay, and memberships. Tunisian film sites can easily become a place for re-enactment, entertainment, and immersion experiences revolving around the *Star Wars* world.

Groups

The MICE segment will slowly become an interesting source of traffic as travel restrictions are lifted worldwide. Companies will start by hosting small- to medium-sized events in destinations with suitable infrastructure and services available. Tunisia can become an interesting MICE alternative, in particular for the European market, as travel restrictions ease.

Tunisian World Citizens

Tunisians living abroad are a potentially important segment who can combine regular (often annual) visits to see family and friends, with new experiences in other regions of Tunisia, previously less known or visited. These travelers bring friends and extended family with them, becoming a steady source of promotion for the country.

V. Positioning Strategy



A consumer-oriented branding and positioning strategy should be one that matches the most interesting potential markets' needs in a trip with what Tunisia can offer as a destination. Additionally, this strategy should focus on raising awareness for those attractions within the country that go beyond being only beach destinations and have products with a high dose of sustainability.

Match between Market and Product

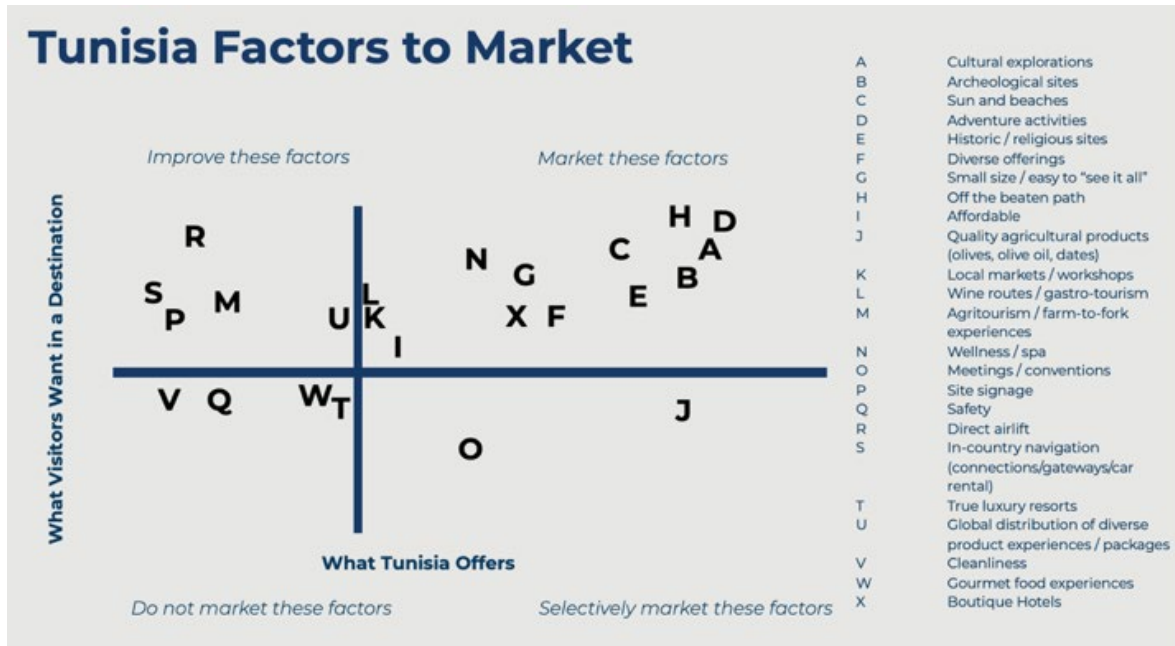
Tunisia's potential to grow in the post-COVID months relies on having a good number of open-air, interesting attractions available and in conditions expected by travelers. Consumer preferences in the last years have grown in the need for authentic, off-the beaten-path experiences that not only entertain but offer opportunities for personal growth. The fact that these assets are easy to cover in a small country adds to the desirability of the destination.

Tunisia Assets to Market	Travelers' Needs
Adventure activities	Natural, open-air attractions
Off the beaten path	Authentic experiences
Cultural explorations	True discovery
Archaeological sites	Safety
Sun and beaches	Care and attention
Historic/religious sites	Variety of options
Easy access	Entertainment

Potential Factors to Market

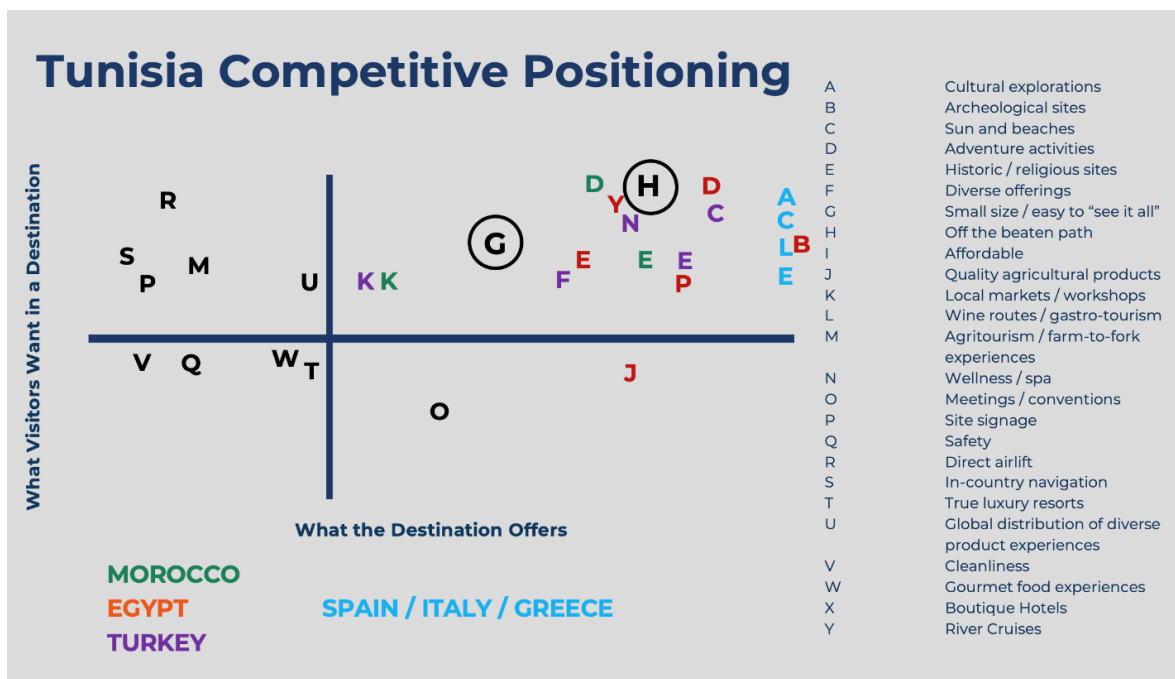
When matching what visitors want in a destination with what Tunisia offers, it's important to see how interesting each factor can be for potential travelers and how developed Tunisian assets are now. As presented in the quadrant table below, the factors to market lean strongly towards adventure activities and historic/cultural experiences. Tunisia has an opportunity for branding the country as a place that provides a variety of interesting attractions beyond its beaches, providing almost year-round sunny weather, great diversity of products, friendly people, and amazing food.

The potential becomes even more apparent when highlighting Tunisia's unique accessibility and products that are off the beaten path.



Competitive Positioning

Comparing these factors with their equivalent in competitor countries, it's clear that Tunisia is practically alone in two categories: being a small country and having a large variety of easy-to-reach assets, while still being an off-the-beaten-path destination, providing travelers with fewer crowds, ease of visitation, and a high level of authenticity.





VI. Key Messages

Unique Selling Points

Tunisia's key messages serve to succinctly convey its unique selling points and key assets to global visitors. These key messages can be mixed and matched for the audience and used as talking points or in written/online materials (such as on Tunisia's website as well as in marketing materials).

Instead of communicating all points, key messages aim to communicate the most important points well. These key messages also serve to combat myths and educate external audiences on what Tunisia offers.

The three key messages that have been developed highlight Tunisia's top assets in a way that quickly captures attention. The messages lean into Tunisia's strengths and play up opportunities while simultaneously working to combat challenges and weaknesses. These key messages are meant to be shared widely with target audiences, and additionally, should be shared with key stakeholders throughout Tunisia to help more widely promote all the country's assets to visitors.

Three Key Messages

The following three key messages shine a spotlight on Tunisia's North Africa location, the off-the-beaten path adventures to be had in Tunisia, and the culture and history visitors can embrace in Tunisia.



Where North Africa Meets the Mediterranean

Tunisia is the northernmost country in Africa, situated just south of Italy in the middle of the southern coast of the Mediterranean Sea. The small country (less than one-fifth the size of France) packs a big punch when it comes to diverse landscapes and experiences for the wanderlust traveler. Tunisia is where you'll find soaring peaks of the Atlas Mountains, spectacular sand dunes of the Sahara Desert, lush oases, more than 30,000 archaeological sites and monuments, sun-soaked Mediterranean beaches and much more. You'll hear Arabic, French, English, Amazigh, and Italian spoken among the country's 11 million residents – the mix of languages a reflection of the country's colorful history. Adventurers may choose the road less traveled. History buffs can opt for a path walked 3,000 years before them. This is a place where you can fully immerse yourself in the culture, arts, nature, archaeology, food, and people that are authentically Tunisia.



Wildly Adventurous. Truly Tunisian.

Tunisia is a country made for the adventurer. The nomad. The wild at heart. The options are limited only by the number of days you've got. The country's small size enables you to truly see it all. Trek through the Atlas Mountains, stroll through the Mediterranean forests, kite surf on the coast and wander through a more than 100-million-year-old canyon. Get a rush of adrenaline riding an all-terrain vehicle over the high sandy dunes of the Sahara Desert or climb on a camel to sightsee at a slower pace. Sip local green tea topped with Tunisian-grown pine nuts and snack on bread baked over coals on top of the hot desert sand (a method used for centuries). Gaze across the Sahara's Mars-like landscape from one of the *Star Wars* film locations. Lounge in a lush oasis dotted with palm trees bearing hundreds of varieties of sweet Tunisian dates. Choose your adventure. Go off the beaten path and create an experience that's truly Tunisian.



Rich Culture. Ancient History.

Tunisia offers a rich history and proud heritage shaped by a mix of cultures dating back more than 3,000 years. You'll likely hear friendly exchanges amongst the locals, where the Arabic greeting of "Salem" or "Aslama" is common, used like "Hello" and simply meaning "Peace on you." Step back in time and wander through centuries-old Punic civilizations, where entire capital cities stand tall. Watch the women, hard at work behind a loom, creating an intricate hand-stitched carpet knot-by-knot in a tradition that's been passed from mother to daughter for generations. Breathe in the crisp air as the call to prayer rings out from a nearby mosque. Immerse yourself in

the distinct blend of beautiful cultures that make up Tunisia. The country's small size enables you to easily see it all in one vacation – from archaeological sites to Mediterranean forest to Sahara Desert, Atlas Mountains, and sandy beaches along the coast. Tune into your senses and create your own path.

Messaging for Target Personas

The Outdoor Enthusiast will be interested in hearing Tunisia is where North Africa meets the Mediterranean, that its diverse landscapes match a diverse culture and history, and that there is a variety of festivals to choose from.

The Family Adventurer will be keen on visiting a place with rich culture and ancient history, on learning about the interesting food and wine scene, and the immersive experiences.

The World Traveler Connoisseur will be thrilled to learn Tunisia is so accessible he can have a cultural and historical experience combined with a beach getaway.

The Free-Spirited Traveler will be very interested in a wildly adventurous, truly Tunisian experience, being able to travel through the many landscapes at his own pace, having a variety of active experiences.

The Accomplished Experience Seeker appreciates rich culture and ancient history that provide that Instagram photo and a way to keep the family entertained while on an enjoyable trip.





Tunisia



Tunisia

VII. Marketing Campaigns to Implement the Positioning Strategy

Purpose of Marketing Campaigns and Goals

For potential travelers who will be interested in the Tunisian tourism assets identified, the recommended strategy is to focus communication efforts on specific campaigns. Creating and implementing regular marketing campaigns will be crucial to deliver the matching message to the chosen audiences, increasing awareness on the desired positioning, generating interest in potential travelers, and keeping the mainstream Tunisian audience aware of these promotional efforts.

The recommended branding scheme should be an umbrella branding model, with a big brand that speaks to the general attributes, and sub-brands that will be deployed through specific campaigns for specific audiences. Understanding what travelers around the world want in a trip and what Tunisia has to offer, an effective concept is: **TOTALLY TUNISIA**

Tunisia needs a brand identity that both catches the attention of global travelers and dispels myths. The brand identity also needs to evoke a feeling. Tunisia wants global travelers to stop and to think. Tunisia wants to

create a brand identity that helps the country rise amongst competitor destinations as the top choice for travel.

The main goal of these campaigns is to create interest and demand for Tunisia's sustainable tourism products. In the long term, Tunisia should be looking at a 20% increase in overnight stays in underserved regions of the country, a 20% increase in visitor satisfaction for sustainable tourism products, and a 10% increase in average tourist spending.



Campaign Development Strategy

Correct brand positioning for a destination takes a constant effort over time. Positively changing the perception Tunisia has in the minds of several audiences should come as the result of a battery of marketing campaigns, targeted to the specific audiences addressed.



- Passionate
- Authentic
- Warm
- Open
- Relatable



- Warm and Welcoming.**
Tunisia greets visitors with open arms. We're hospitable, friendly and kind.
- Adventurous and Advancing.**
Tunisia is enticing to visitors. Tunisia is real and rising. Our country gives visitors an immersive experience and stays true to our cultural heritage. This is a place you can roam free and explore.
- Authentic and Traditional.**
Tunisia offers an "off the beaten path" and truly authentic experience for visitors.

Three to four campaigns should be executed each year. One for the domestic market, one for international markets, and one for specific products or themes. Public awareness campaigns should also be deployed.

Domestic

The main goal of these campaigns is to create sustainable demand for Tunisia's products in the domestic market. Local travelers must have the tools and incentives to experience tourism products different than the already known beach products and create a traveling culture that will thrive beyond the post-pandemic years. The "Tounes Lik" platform should allow its audience reach for different themes, such as photography contests, radio interactive shows, cleanup activities, family travel, weekend getaways, treasure hunts, and social media interaction.

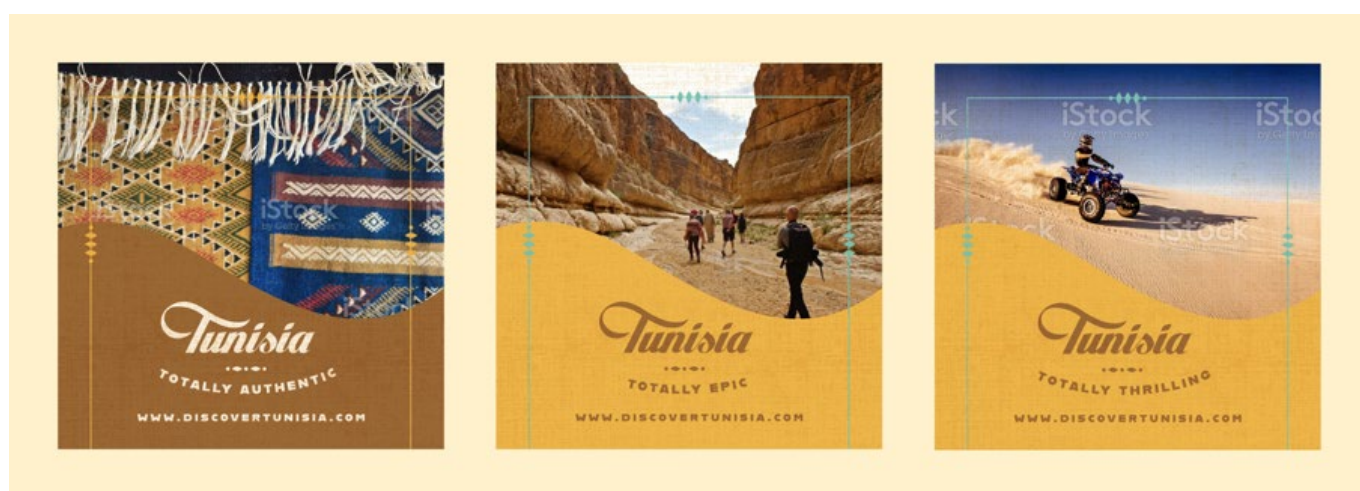
Marketing Objectives	Expected Results	Key Performance Indicators
Create demand for Tunisia's sustainable tourism products in the domestic market.	<p>Create a loyal following of the Tounes Lik FB page, increase engagement.</p> <p>Engage Tunisian influencers for the specific campaigns.</p> <p>Drive traffic to campaign partners in the different destinations.</p>	<p>FB page audience growth, engagement measurements.</p> <p>Influencers' page numbers, links to campaigns.</p> <p>Leads generated for partners, bookings.</p>

International

Goals for these campaigns are to increase brand awareness as a varied destination, create digital leverage for the official promotion platforms, and establish Tunisia as a strategic destination for International travelers. Digital advertising will reach our targeted audience with destination news and offerings, testimonials on special interest travel, influencer advice for specific geographic audiences, and seasonal markets and trip recommendations ranging from weekends to full country coverage journeys.

Marketing Objectives	Expected Results	Key Performance Indicators
Increase digital presence of official Tunisia platforms in international markets.	Position the official Tunisian pages as the source of information for potential travelers.	Page traffic, link navigation, mentions, campaign hashtag analytics.
Establish Tunisia as a strategic spot for European travelers looking for competitive cultural, historic, and adventure travel.	Increase reach, engagement, conversion, and community build in European countries: Germany, UK, France, Italy, and Spain. On a second stage, The Netherlands, Belgium, Bulgaria, and Switzerland.	Website analytics, geographic source reports, traffic by language. Conversions with selected partners for each market.
Introduce Tunisia into harder-to-reach audiences in Asia and the USA as an interesting, untapped destination.	Generate traffic into information sources from target countries such as China, Russia, and the USA.	Website analytics, geographic source reports, traffic by language. Conversions with selected partners for each market.
Establish trade linkages to strengthen Tunisia's professional tour network in the target markets.	Participation in trade shows, fam trips, and direct sales initiatives to promote the new Tunisian image. Advertise in specialized media to reach desired audience. Create trade toolkits for key players.	Specific country awareness in the desired target. Insertions in the main trade tools for promotion: Catalogs, mailing lists, itineraries, websites. Lead generation.

These campaigns can be graphically approached under the Totally Tunisia umbrella and sub-branding campaigns, depending on the specific audience it's tapping into: Totally Authentic, Totally Epic, Totally Thrilling.



Product Campaigns

The main goal of these campaigns will be to position Tunisia as a megadiverse destination. Themes will go from specific adventure travel outings, the complete list of Tunisian events and festivals, *Star Wars* experiences, and wine and dine retreats, to the ultimate guide to 3,000 years of history in one country.

Marketing Objectives	Expected Results	Key Performance Indicators
Increase awareness of Tunisia's alternative products in target international markets.	Generate traveler arrivals in the targeted destinations. Build demand for sustainable products within Tunisia, which strengthen the country's image as a diverse offer destination.	Digital analytics regarding searches, page views, length of stay, navigation in the official pages. Bookings with selected partners. New articles in traditional media. Brand awareness.
Position the Tunisia brand as a total country, enhancing its high diversity.	Generate bookings for alternative product partners across the country. Increase stay in selected parts of Tunisia. Increase spend in satellite products, related to alternative nature of stay.	Average stay in selected destinations. Leads generated for specific partners. Sales for food, transportation, and crafts suppliers. New articles in the media.

In the same way, the graphic campaign can be modulated so it matches those assets that target audiences find interesting: Totally Untamed, Totally Untapped, Totally Unexpected.



Public Awareness Campaigns

The Tunisian travel industry can also benefit from awareness generated with audiences that are not necessarily travelers. Urban dwellers can become the new acolytes of waste management, historic site neighbors can build a special pride for patrimony that is essentially theirs, rural populations can rescue important cultural assets, and the regular Tunisian citizen can relate to the industry if they all see tourism as a valuable activity across many layers. Tunisian professionals in all related fields such as financial, logistics, regulatory, and legal can positively impact the activity if correctly informed.

The goal is to target as many Tunisians as possible to encourage resident support, change perceptions, and reinforce positive behavior towards tourism.

Marketing Objectives	Expected Results	Key Performance Indicators
Create general awareness for the activity in broad audiences across the country	Press release circulation, media coverage of large events, constant presence in traditional and social media.	Public brand awareness increase, activity image measured as positive.

Campaign Partners

Building the image of Tunisia in the minds of our potential consumers is a challenging endeavor. No single organization, collective association, aid agency, or government authority can achieve this task on their own. Small and medium entrepreneurs who are willing to develop specific products need a working environment that allows them to do so competitively. Local agencies and tour operators need communication tools that communicate effectively to international counterparts so they place the product in a timely fashion. Local governments need the correct trade contacts so they can elicit travelers' needs and trends and identify opportunities in the field.

The Public Sector

The Ministry of Tourism and the ONTT must be the pillars of Tunisia's promotion initiatives and campaign development.

- › The official Tunisia website must carry the most effective catalog of products for target segments, which match travelers' needs and desired product.
- › Specific landing pages must be built to elaborate on information for different travel interests.
- › SEO and SEM must drive correct traffic considering traveler personas.
- › A professional section can be used for database construction and linkages.
- › Official social media profiles must also generate content and build community around this strategy.
- › All campaigns will need a specific place on the official website and social media pages to push promotion and receive requests.
- › Content provided by all partners must be replicated, linked, and tagged in official platforms.
- › The ONTT must be responsible for measuring web analytics, social media metrics, and providing key players with performance reports.
- › ONTT should provide the industry with promotional material and content, based on new communication approaches.
- › Representatives in the target markets must be aligned with this strategy and messages, providing press and trade abroad with content and establishing linkages with Tunisian players.
- › All CRTs must be up to date with the plan goals and each campaign objectives.
- › CRTs will be responsible for identifying local key players who can match the promotion strategy and provide linkages.

Below is a mock-up of a potential webpage with a focus on those elements attractive to prospective travelers. It then links to specific products depending on the targeted campaign of the moment.



Tunisian Travel Trade

Local agencies and DMCs are key to consolidating services coming from small operations and satellite businesses to create the sustainable product modern travelers need.

- › Industry associations (Fi2T, hotels associations, boutique hoteliers) must be consulted and engaged with the described strategy before deployments of campaigns.
- › DMCs must build itineraries and packages considering the most effective results for the specific markets they normally work with.
- › SMEs providing products and experiences matching the strategy must be trained on providing service across the commercialization chain.
- › OTAs that provide experiences such as Viator, GetYourGuide, Airbnb Experiences, and Expedia must be constantly fed with the identified products and metrics analyzed.
- › A battery of regular training must keep all key players up to date with the strategy.

Below is an example of a trade show booth, where Tunisia can feature the new focus on these sustainable products without losing its essence.



International Travel Trade

When promoting an alternative product, international tour operators are sometimes the most effective way of reaching a targeted, captive audience who will listen to professional recommendations.

- › International tour operators in Germany, the UK, and France must be targeted first with the developed products and itineraries.
- › Fam trips must also be organized for these operators to see firsthand the new Tunisian offer.
- › Roadshows for door-to-door marketing must also be organized, recruiting representatives and trade already familiar with the product.
- › A second set of cold calls, presentations, fam trips, and seminars must then follow with the second and third tier of target markets
- › The fourth tier of target markets should either be approached along with the second and third or individually, depending on the metrics of the first campaigns.
- › Trade show participation must incorporate message and brand image according to the target market's needs.

Below is an example of an airport ad, which can target the international audiences currently traveling to competing destinations. The traveler's mood is always planning for their next trip.



Tunisian Media

Local reporters can reach new products and places almost immediately. They can create new pieces quickly, and knowing the strategy is to focus on domestic markets first, local media reach plays a very important role in raising awareness for these products.

- Domestic tourism campaigns will rely on traditional media such as panels, radio, and television for creating awareness and call to action.
- These will be modulated according to the campaign theme: Weekend Tunisia, the Mobile Game, and the Radio Competition.
- The digital media will use Instagram, TikTok, and Facebook, but this last platform is where investment should be concentrated, given the high adoption in Tunisia.
- Tunisian influencers such as The Dreamer can be recruited for content regarding images of landscapes across Tunisia, adventure activities, and local cultures.
- Partners like Tanwicha can provide specific content about Tunisian gastronomy in the different regions.
- Digital influencers like Maissa Tekaya can drive traffic and collaborate with campaigns related to family travel.

International Media

Travelers around the world still find out about new trends in travel through the media. They read traditional and digital articles, follow travel and lifestyle influencers, and consult social media when researching where to go. PR plays a crucial role for getting publications in the correct media.

Press trips must be organized for targeted journalists to visit Tunisia and report on the products tailored to the specific targets. Preferred media should include *Condé Nast Traveler*, *Travel + Leisure*, *National Geographic Travel*, and *Outside Magazine*, among others.

International social media influencers must also be recruited to spend time in different Tunisian destinations, especially those who focus on travel, photography, adventure, culture, food, and lifestyle.

Conclusion



Modern travelers from Europe, North America, and some parts of Asia are visiting countries that provide an experience very similar and in some dimensions inferior to what Tunisia has to offer. More than 18MM travelers visit competitors Morocco, Egypt, and Turkey, and more than 70MM for benchmarks including Italy, Greece, and Spain.

Within these travelers, there are segments eager to take a vacation in places where leisure activities are available and can be combined with cultural, historic, and adventure experiences. These travelers value destinations with a high variety of offerings and with a high level of authenticity.

The Tunisian brand can position the country as a destination that offers this great variety of interesting assets in an easy access setting and with an off-the-beaten-path quality.

Targeted campaigns can achieve this task by focusing on domestic and international travelers, as well as promoting specific products in the correct markets. Awareness, extended time of stay, and higher expenditures are the expected results from these campaigns.

Annex 1: Competition And Benchmark Analysis



Establishing a competitive set helps us to gauge if our efforts are hitting the target with the correct aim. It's a way for us to see where the traffic is going, and in what numbers, compare the results of similar or different campaigns with similar audiences. Finally, it is an effective way to differentiate from the competition by rescuing our unique assets.

Tier 1

Morocco: After spending nearly seven years with a 1% average growth in tourist arrivals, Morocco experienced an interesting spike that started in 2016. The country received 10.6MM visitors in 2016, 11.5 in 2017, 12.5 in 2018, and 13.1MM in 2019, making them the most visited country in Africa. Tourism expenditure also spiked, reaching a historic high of 3.172 billion US dollars in 2019. French tourists are the largest group of foreign visitors to Morocco, with around 1.99 million French nationals visiting the country in 2019 (15% of the total). Moroccan foreign residents account for 46% of arrivals. Morocco has more than 2,000 hotels, with a total capacity of 400,000 beds, including 15,000 beds in Marrakech, Morocco's most visited city, alone. The average occupancy rate is around 45%. The tourism sector in Morocco employs more than 750,000 people and represents 7% of Morocco's gross domestic product. The sector also represents 29% of Morocco's service exports.

Morocco's current branding concept is "Be Inspired." They use the colors of the Moroccan flag in their logo and use arabesque architecture along with sea and palm icons in a square arrangement. In their institutional communications, they encourage travelers to discover Morocco along three axes: History and Geography, Art & Culture, and Contemporary Morocco. When they list the different places to go, their classification is: 1. Nature and Discovery of Rural Heritage; 2. Beaches, Sports and Leisure Activities; 3. Medinas and Beaches; and 4. Medinas & Cultural Heritage Immersion. The strategy here seems to be a mix-and-match of the places with a combination of two or more of these assets.

Egypt: After a record 14.7MM arrivals in 2010, Egypt saw diminished numbers that hit a record low 5.4MM in 2016. A very radical spike happened after that, receiving 8.29 in 2017, 11.34 in 2018, and reaching 13.026MM visitors in 2019. Tourism expenditure had reached a record 4.35 billion US dollars in 2016, dropping to 2.42 in 2017 and then spiking up until reaching 3.72 billion in 2019. 68% of tourists arriving in Egypt are from Europe. 21% are from the Arab countries and 6.4% from other nationalities. 3.5% of tourists are American.

The last campaign run by Egypt was created in 2014, with the umbrella "Experience Egypt" and a widely used tagline that reads "Where it all begins." The

official website today features the same hieroglyphic-inspired logo designed back in 2014, and provides very straightforward information on where to go, classified in four parts: The Nile Valley, The Red Sea, the White Med, and the Western Desert. A second section classifies Experiences in Adventure, Culture, Relaxation, Family, Romance, Spiritual, Culture, Nature, Nile Cruise, Sun & Sea, Spa, Spiritual 2, and Sports. There is an events-dedicated section.

Turkey: This country has also seen a spike in tourist arrivals since 2016. Turkey received 30.9MM visitors in 2016, 37.9 in 2017, 46.1 in 2018, and 51.7MM in 2019, ranking as the sixth most popular tourist destination in the world. Tourism expenditure reached a historic record in 2018, with 6.07 billion US dollars. The top nationality of foreign visitors is Russian, accounting for 14% of the total. Source markets are varied, the following nationalities are Germany, Bulgaria, United Kingdom, Iran, Georgia, Ukraine, Iraq and the Netherlands.

Tourism in Turkey is focused largely on a variety of historical sites, and on seaside resorts along its Aegean and Mediterranean Sea coasts. Turkey has also become a popular destination for culture, spa, and health care. The current promotion strategy displays a “Go Turkey” umbrella under which 48 types of experience are promoted, and deploys specific campaigns for themes and destinations, such as “Istanbul is the New Cool” and “Turkaegean.” The call-to-action communications are based on destinations, experiences, “most popular” products, gastronomic, faith, history, sports, sea and sand, nature, and special interest. Online presence: Go Turkey had 350 Instagram posts and 50 Instagram posts per month during January–July 2021, and 251 Facebook posts and 51.2 Facebook posts per month during March–July 2021. In Viator, 85% of listings for outdoor activities have a rating of 4* and up, and the respective shares are 91% for art and culture tours and 45% for food and drink tours. Promoting the country as a safe destination has been a strategic priority for Turkish authorities in the last year. Since June 2020, the implementation of the Safe Tourism Certification Program (STCP) has gained publicity through dedicated websites where users can find information about certification guidelines, search for accredited businesses, and view videos about the vaccination program for tourism employees. Approximately 11,000 tourism businesses were registered with the STCP, and more than 365,000 employees in the tourism sector were fully vaccinated by June 2021. Also, throughout 2021, the campaign Choose your Memories has driven TV video ads and online ads in more than 82 countries across the globe, which has had a positive impact on the performance of official destination channels and has been the pillar

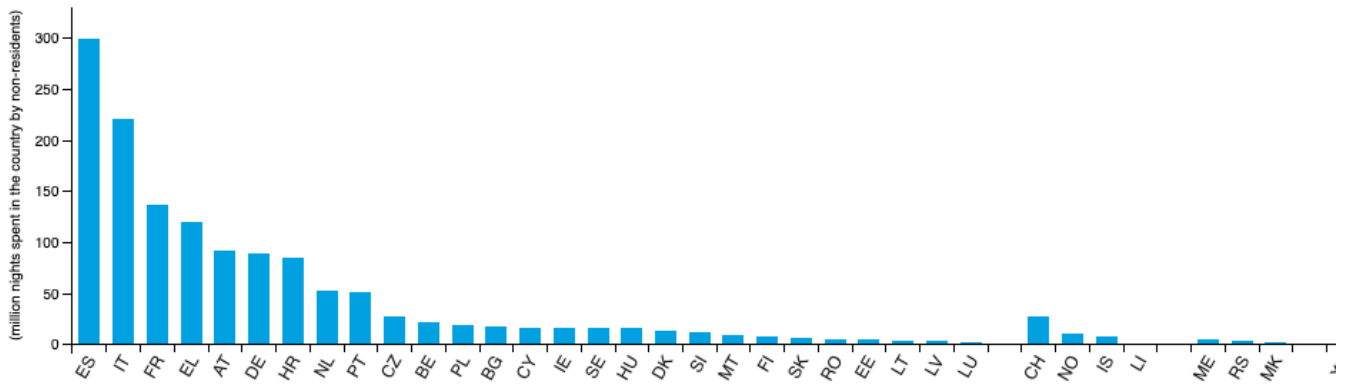
for running a series of season-specific campaigns including Turkish Winter and TurkAeagen.

Tier 2

Greece: This country has registered an important and steady growth in arrivals since 2013, when it received 20.1MM tourists. After an average 7% annual increase in arrivals, Greece received a total of 34MM tourists in 2019, making it one of the most visited countries in Europe and the world. Tourism expenditure was 4.2 billion dollars in 2019. The number one source market is Germany, followed by Bulgaria, the United Kingdom, Italy, France, Romania, and the United States. According to a survey conducted in China in 2015, Greece was voted as the Chinese people’s number one choice as a tourist destination. In November 2016, Austria, like China, announced that Greece was the favorite tourist destination for its citizens. Tourism in Greece will typically peak between May and September, where approximately 75% of all tourist visits happen. There are a total of 9,730 hotels in Greece, totaling 788,553 beds. Greece has also opted for the specific promotion of products over the overall country brand communication, diverging between places to go and what to do.

Italy: Italy has only seen growth in visitation numbers since 2005, featuring incredible absolute numbers. Italy received 84.9MM visitors in 2016, 89.9 in 2017, 93.2 in 2018, and 95.4MM in 2019, making Italy the fifth most visited country in international tourism arrivals. Expenditures reach a record 37.9 billion dollars in 2019. According to estimates by the Bank of Italy of 2018, the tourism sector directly generates more than 5% of the national GDP (13% considering also the indirectly generated GDP) and represents over 6% of the Italian workforce.

People mainly visit Italy for its rich culture, cuisine, history, fashion and art, its beautiful coastline and beaches, its mountains, and priceless ancient monuments. Italy also contains more World Heritage Sites than any other country in the world (58). As of 2018, the Italian places of culture (which include museums, attractions, parks, archives, and libraries) amounted to 6,610. Active hotel businesses are 33,000, while non-hotel businesses are 183,000. The tourist flow in the coastal resorts is 53%. With a more sophisticated strategy, the Italian promotion also diverges between Where to Go and What to Do, but it is on this second dimension that they tap into the many interests worldwide travelers can have, with specific communications for mainstream and special interest travelers, and a multi-platform digital follow-up.



Spain: With truly gigantic numbers, Spain has only had three slopes in its growth since 1995, in 2008, 2009, and 2012. All other years this country has seen steady growth, especially since 2012. Spain received 115MM visitors in 2016, 121 in 2017, 124 in 2018, and 126MM in 2019. Tourism in Spain is the third major contributor to the national economy, contributing about 10–11% to Spain’s GDP. Ever since the 1960s and ’70s, the country has been a popular destination for summer holidays, especially with large numbers of tourists from the United Kingdom, Ireland, France, Germany, Italy, the Benelux, and the United States, among others. In 2019, Spain was the second most visited country in the world. Spain ranks first among 140 countries in the biannual Travel and Tourism Competitiveness Index published by the World Economic Forum in 2019, matching the top position already achieved in 2017 and 2015.

Spain’s logo keeps the same design developed 30 years ago. The current campaign is titled “You Deserve Spain.” Where to Go and What to Do are also the axes of communication, but Spain cleverly adds two elements one normally does not see in other promotion strategies: 1) they add a powerful travel planner to their website, which allows potential travelers to see all

their options in an easy manner, and 2) they display specific promotions that drive people into less-traveled destinations on more relaxed times of the year.

Additionally, some Domestic Tourism benchmarks can be rescued to tap into this COVID-year interesting market as well. Countries considered in this category are in the Mediterranean region, Europe, the Middle East, and Overseas.

Italy has established financial incentives for Italian families traveling within Italy, as well as a health pass. Portugal’s bet was on raising awareness, launching the #TuPodes video campaign, featuring tourists and tourism employees. Croatia encouraged off-season tourism with targeted discounts. Ireland is promoting staycations, with the “Keep Discovering” campaign, offering VAT reductions, and partnering with digital platforms. France leveraged influencers, technology, and partnerships with public and private sector to support domestic tourism.

Greece, Croatia, and Greenland are focusing on promoting staycations in specific parts of the country, in specific moments of the year. Macao is encouraging domestic tourists to sign up for tours run by local agencies, with incentives.



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