THE DEVELOPMENT OF A STRATEGIC MARKETING PLAN FOR THE MANGAUNG TOURISM AREA

By

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Dissertation submitted in fulfillment of the requirements for the degree

MAGISTER TECHNOLOGIAE: MARKETING

in the

School for Entrepreneurship and Business Development

Faculty of Management Sciences

at the

Central University of Technology, Free State

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BLOEMFONTEIN

OCTOBER 2008

DECLARATION OF INDEPENDENT WORK

DECLARATION WITH REGARD TO

INDEPENDENT WORK

I, Malefane Stephen Monyane, identity number 740504547187 and student

number 9808531, do hereby declare that this research project submitted to the

Central University of Technology for the Degree MAGISTER TECHNOLOGIAE:

MARKETING, is my own independent work; and complies with the Code of Academic

Integrity, as well as other relevant policies, rules and regulations of the Central

University of Technology and has not been submitted before to any institution by

myself or any other person in fulfillment (or partial fulfillment) of the requirements for

the attainment of any qualification

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ACKNOWLEDGEMENTS

SUMMARY

The global research report by the Euromonitor indicates that in the year 2006, global tourism reached a peak of US$ 756,4 billion. The total global arrivals grew with an amount of 4,6 percent from 843 million international trips in the year 2005 to 882 million in the year 2006 (South African Tourism Annual report, 2006:13 and World Travel and Tourism Council 2006).

In 2006, the Free State Province received 8,4 percent of total foreign visitors to South Africa. This number increased to 10,7 percent in 2007. In the year 2006, the Free State Province accommodation sector sold 672 257 bed nights. This number increased to 911 834 in 2007 (SA Tourism Quarterly report, 2007:38–40).

The Mangaung Tourism area needs to take advantage of the world and regional tourism growth. One of the most effective ways in which the Mangaung Tourism area can take advantage of the economic benefits of tourism in the region is through the development of a strategic tourism marketing plan to guide future marketing actions in a sensible way. Therefore the purpose of this study is to develop such a plan which may serve as the basis of tourism planning and promotion in the future.

A qualitative method of research was used to obtain data. Structured questionnaires were developed with open-ended questions for comments from the respondents. The different sections of the questionnaire were based on the elements of strategic marketing planning. Questionnaires were distributed to several stakeholders. Individual interviews were held with the Board of Directors.

Both the stakeholders and Board of Directors' questionnaires were discussed at a workshop attended by the stakeholders and Board of Directors of the Mangaung Tourism area. Under the question of goals and objectives, 100 percent of the respondents said that Mangaung Tourism should serve as a destination marketing organisation. Fifty eight percent of the respondents were not aware of the mission statement. Sixty seven percent of the respondents replied that Mangaung Tourism's target market should be the business and conference market.

The majority of the respondents indicated that the Mangaung Tourism brand name needs improvement. Under the question of pricing, the majority of the respondents recommended the value based pricing for the Mangaung Tourism area's tourism products and services. On the standard of services the majority of the respondents indicated that it ranges from poor to good services. The annual Indaba, billboards and media releases are the preferred method of promoting the Mangaung Tourism area. Good finance is identified as the major critical success factor for the Mangaung Tourism area.

In terms of the SWOT analysis question, the majority of the respondents indicated that the Mangaung Tourism area's location as halfway stop (N1 from Johannesburg to Cape Town), is the major strength, poor marketing as the major weakness, its central location as the major opportunity and the perception of Mangaung as a stop over destination as a major threat. Kimberley is identified as the major competitor. The majority of the respondents indicated that the Mangaung Tourism area should be positioned as a conference destination. The 2010 Soccer World Cup is identified as the main priority for the Mangaung Tourism area by the majority of the respondents. The research findings, recommendations and conclusions form the basis for the development of the strategic marketing plan for the Mangaung Tourism area.

OPSOMMING

Die wêreld-navorsingsverslag van die Euromonitor dui aan dat wêreldwye toerisme 'n hoogtepunt van US$756,4 biljoen bereik het in die jaar 2006. Totale wêreldwye aankomste het met 4,6 persent gegroei, van 843 miljoen internasionale reise in die jaar 2005 tot 882 miljoen in die jaar 2006 (Suid-Afrika Toerismejaarverslag, 2006:13; Wêreld Reis- en Toerismeraad 2006).

Die Vrystaat Provinsie het 8,4 persent van die totale buitelandse besoekers na Suid-Afrika gekry in 2006 en hierdie syfer het verhoog na 10,7 persent in 2007. Die Vrystaatse akkommodasiesektor het 672 257 bednagte verkoop in 2006 en hierdie syfer het verhoog na 911 834 in 2007 (Suid-Afrika Toerisme Kwartaal Verslag, 2007:38-40).

Die toename in wêreld- en streektoerisme bied die Mangaung Toerismegebied geleenthede wat benut moet word. Een van die mees effektiefste maniere waarmee die Mangaung gebied voordeel kan trek uit die ekonomiese voordele van toerisme, is deur die ontwikkelling van 'n strategiese toerismebemarkingsplan wat toekomstige bemarkingsaksies op 'n sinvolle manier sal rig. Die doel van hierdie studie is om so 'n plan saam te stel, wat sal dien as basis vir toekomstige toerismebeplanning en bevordering.

'n Kwalitatiewe navorsingsmetode is gebruik om die data te verkry. Gestruktueerde vraelyste met oop vrae vir kommentaar van die respondente is ontwikkel. Afdelings van die vraelys is gebaseer op die elemente van strategiese bemarkingsbeplanning. Die vraelyste is na verskeie belangegroepe versprei en individuele onderhoude is gehou met die Raad van direkteure of die Mangaung Toriesmegebied. Die vraelyste van beide die belangegroepe en die direkteure was bespreek tydens 'n werkswinkel wat deur laasgenoemde bygewoon was.

Al die respondente (100%) het aangedui dat die Mangaung Toerismegebied as 'n bestemming-bemarkingsorganisasie moet dien. Agt-en-vyftig persent van die respondente was nie bewus van die missie-stelling nie. Sewe-en-sestig persent van die respondente het aangedui dat die Mangaung Toerismegebied op die sakesektor en konferensiemarkte moet fokus.

Die meerderheid respondente het aangedui dat die handelsnaam van die Mangaung Toerismegebied verbeter moet word. Die meerderheid respondente beveel aan dat waarde-gebaseerde prysing gebruik moet word vir die produkte en dienste in die Mangaung Toerismegebied, asook dat die standaard van dienste wissel van swak na goed. Die mening is dat die jaarlikse Indaba, kennisgewingborde en mediaverklarings beskou word as die beste manier om die Mangaung Toerismegebied te bevorder. Goeie finansiële bestuur word aangedui as die grootste kritiese suksesfaktor vir die Mangaung Toerismegebied.

In terme van die 'SWOT'-annalise beskou die respondente die Mangaung Toerismegebied soos volg: die grootste sterkpunt is dat die Mangaung Toerismegebied 'n 'halfpad' stopplek (N1 Johannesburg tot Kaapstad) is; swak bemarking word beskou as die grootste swakpunt; die sentrale ligging van Mangaung as die grootste geleentheid; en die persepsie van Mangaung as 'n stopplek as die grootste bedreiging. Kimberley is geïdentifiseer as die grootste mededinger. Die meerderheid van die respondente is van mening dat Mangaung geposisioneer moet word as 'n konferensiebestemming en die 2010 Sokker Wêreldbeker is geïdentifiseer as die hoof prioriteit vir die Mangaung Toerismegebied. Die navorsingsresultate, aanbevelings en afleidings vorm die basis vir die ontwikkelling van 'n strategiese bemarkingsplan vir die Mangaung Toerismegebied.

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LIST OF ABBREVIATIONS

CNN	-	Cable News Network
DEAT	-	Department of Environmental Affairs and Tourism
GDP	-	Gross Domestic Product
MACUFE	-	Mangaung Arts and Cultural Festival
MESE	-	Meeting, Exhibition and Special Events
Q2	-	Quarter two reports (April-May-June)
Q3	-	Quarter three reports (July-August-September)
SAARF	-	South African Advertising Research foundation
SAT	-	South African Tourism
SMME	-	Small Medium Macro Enterprises
TGCA	-	Tourism Grading Council of South Africa
UN	-	United Nations
UNESCO	-	United Nations Educational, Scientific and Cultural Organisation
USA	-	United States of America
VFR	-	Visiting friends and relatives
WTO	-	World Tourism Organisation
WTTC	-	World Travel and Tourism Council

CHAPTER 1

INTRODUCTION

OVERVIEW

The global research report by the Euromonitor indicates that in the year 2006, global tourism reached a peak of US$ 756,4 billion. The total global arrivals grew with an amount of 4,6 percent from 843 million international trips in the year 2005 to 882 million in the year 2006. According to the World Travel and Tourism Council, global tourism provided 221 million jobs in the year 2005, and will provide 269 million jobs by the year 2015 (South African Tourism Annual report, 2006:13; World Travel and Tourism Council, 2006).

According to South African Tourism, the estimated total foreign direct spending in South Africa (including capital expenditure) from July to September in the year 2006 was a total of R10,5 billion and in the year 2007, it had increased to R12,1 billion. Estimated total foreign direct spending in South Africa (excluding capital expenditure) in the year 2006 was a total of R10,5 billion and in the year 2007, it had increased to an amount of R11,3 billion. Estimated average spending in South Africa per foreign tourist (excluding capital expenditure) in the year 2006 was R5 345 and remained within the range of about R5 103 in the year 2007. The total bed nights spending in South Africa in the year 2006 was R14,9 million and amounted to R16,3 million in the year 2007 (SA Tourism Quarterly report, [Q3] 2007:1). These figures indicate a growth in tourist activity in South Africa and the necessary strategic actions need to be taken to ensure that the tourism industry is utilised and developed to its full potential.

Like other provinces, the Free State is faced with challenges as far as tourism is concerned. The challenges are the following:

• to create a positive perception of the Free State Province as a tourism destination;

- to generate income for the province, by creating new job opportunities, developing new types of tourism (such as agri-tourism), creating new tourist resources and routes; and
- to ensure sustainable tourism development (Free State Tourism White Paper, 2001:1).

In 2006, the Free State received 8,4 percent of the total foreign visitors to South Africa. This number increased to 10,7 percent in 2007. In the year 2006, the Free State Province accommodation sector sold 672 257 bed nights. This number increased to 911 834 in 2007 (SA Tourism Quarterly report [Q3], 2007:38-40). This growth tendency poses a challenge for the Free State Province to take advantage of the growing tourism industry.

The Free State Province consists of the following district municipalities: Motheo, Lejweleputswa, Thabo Mofutsanyane, Xhariep and Fezile Dabi. In 2001, these municipalities gathered for a Free State Tourism Lekgotla, hosted by the Free State Provincial Government. They identified tourism in the Free State as a leading sector in the creation of jobs in the respective sub-regions necessary because of the high rate of unemployment accelerated by the closing down of the mines. The resolution was that tourism could be used to alleviate unemployment and build the economy of district municipalities (Free State Tourism White Paper, 2001:3).

The Mangaung Tourism area falls under the jurisdiction of the Motheo District Municipality and it needs to take advantage of the proposed regional tourism growth. One of the most effective ways in which the Mangaung Tourism area can take advantage of the economic benefits of tourism in the region is through the development of a strategic tourism marketing plan to guide future marketing actions in a sensible way. Therefore, the purpose of this study is to develop such a plan which may serve as the basis of tourism planning and promotion in future.

1.2 PROBLEM STATEMENT

Due to the absence of a strategic marketing plan for the Mangaung Tourism area, opportunities for job creation, small business development and economic growth are lost to a large extent (Personal interview. CEO of Mangaung Tourism, 03 February 2002). Marketing effectiveness in the Mangaung Tourism area will be enhanced through the compilation and application of a strategic tourism marketing plan.

1.3 RESEARCH OBJECTIVES

Under the research objectives the primary and secondary objectives will be discussed.

1.3.1 Primary objective

The primary objective of this study is to formulate a strategic tourism marketing plan for the Mangaung Tourism area.

1.3.2 Secondary objectives

The secondary objective of this study is to:

• identify the critical success factors for an urban tourism area like Mangaung and formulate a SWOT-analysis for the Mangaung Tourism area;

• formulate a competitive profile and develop a mission statement for the Mangaung Tourism area;

• point out relevant tourism priorities; goals and objectives for the Mangaung Tourism area;

• identify relevant tourism target markets for the Mangaung Tourism area and position the Mangaung Tourism area against major competitors in the market; and

- formulate a product; price; distribution; and promotion strategy for the Mangaung Tourism area.

1.4 SIGNIFICANCE OF THE RESEARCH

The research outcomes will contribute substantially to the systematic and orderly marketing of the study area to potential leisure, business and/or sport-oriented tourists.

1.5 RESEARCH DESIGN AND METHODOLOGY

Qualitative research depends primarily on the collection of qualitative data (Johnson and Christensen, 2000:311). Qualitative researchers generally study an observable fact in an open-ended method, without a pre-programmed mind set, and come to theoretical conclusions based on what they observed (Mafaralala, 2006:44).

Qualitative researchers study observable facts thoroughly and over a long period of time. The researcher in this study emphasised findings based on discussions and personal interviews complemented by statistical findings. The researcher used a qualitative research approach to describe events, the standpoint and beliefs of individuals about this research issues (Gay and Airasian, 2000:201). Qualitative research is concerned with people, events, culture and social happenings. Therefore, the manner of analysis is different to the method of analysis used in physical science.

1.5.1 Target population

The population is the larger collection of all the subjects from which a sample is drawn. The population is an entire collection of all the people or all the events. For example, when selling shoes it would be all the men and women who could have patronise the store. In theory, this will be all men and all women who come for whatever reason, into the vicinity of the store (Mafaralala, 2006:45).

The population of this study is all the tourism stakeholders and the Board of Directors of the Mangaung Tourism area. A population is any group that is the subject of research interest. The researcher asked the respondents specific questions purposefully designed for the requirements of this investigation. Similarities, differences and relationships of the information provided by the respondents were valued, analysed and adopted (De Vos, 1998:341).

Mangaung Tourism area consists of the following municipalities: Botshabelo; Bloemfontein and Thaba Nchu.

Botshabelo

Botshabelo is the second largest township area in South Africa after Soweto. It is situated 41km east of Bloemfontein and 10km west of Thaba Nchu. Botshabelo is well known for its diverse cultural activities like the Botshabelo Arts and Crafts centre.

Bloemfontein

Bloemfontein is situated in the heart of South Africa. It is the capital of the Free State Province and the tourism hub of the Motheo District Municipality. Bloemfontein has more tourism activities than the rest of the Mangaung Tourism area. The tourism activities in Bloemfontein include business, sport, entertainment, culture, art, medical, agricultural, history, adventure, events, accommodation and leisure tourism. Bloemfontein is situated 150km east of Kimberley and 180km south of Kroonstad. East of Bloemfontein is the Mangaung Township which is popular for its diverse cultural activities and the township tourism routes.

Thaba Nchu

Thaba Nchu is a vernacular name meaning a black mountain. The area lies 10km east of Botshabelo and 110km northwest of Maseru in Lesotho. Thaba Nchu is characterised mostly by adventure and nature orientated tourism activities.

The Mangaung Tourism area has stakeholders in the following categories of the tourism industry:

- transport;
- travel agencies;
- information centres;
- academic institutions;
- municipalities;
- accommodation establishments;
- tour operators;
- the Department of Environmental Affairs and Tourism; and
- the Department of Arts and Culture.

The researcher used the Mangaung Tourism Data Base (refer to database in annexure A) of 2006 to identify the stakeholders in the tourism category. One hundred and seventy three stakeholders representing the tourism industry in Bloemfontein, Botshabelo and Thaba Nchu were identified from the Mangaung Tourism database. Of the 173 stakeholders from various tourism sectors in the Mangaung Tourism area including accommodation, transport, travel agency, and tour operator organisations, 23 (13 percent) attended the workshop. The stakeholders' questionnaire and Board of Directors' questionnaire were discussed during the workshop. (See annexure E for a copy of the attendance register of the workshop).

1.5.2 Data Collection

In order to collect data, secondary and primary data sources have been consulted. For data collection, similar questions were asked to different stakeholders and board members in the Mangaung Tourism area (which include Bloemfontein, Botshabelo and Thaba Nchu) to determine whether they yielded the same results.

The researcher distributed 173 questionnaires to the Mangaung Tourism area stakeholders and held interviews and a workshop with the Board of Directors. (See annexure B for the questionnaires covering letter; annexure C for the stakeholders' questionnaire and annexure D for the Board of Directors' questionnaire).

1.5.2.1 Interviews

According to De Vos (1998:306), a focus group is a carefully planned discussion designed to obtain perceptions on a defined area of interest in a permissive, non-threatening environment. It is described as a research technique that collects data through group interactions on a topic determined by the researcher.

Interviews were used in this research study as a primary data collection. The researcher conducted a workshop with the Mangaung Tourism area stakeholders and Board of Directors in order to interview people concerning their perceptions.

De Vos (1998:292) defines a qualitative interview as an attempt to understand the world from the participants' point of view, to unfold the meaning of people's experiences and to uncover their lived world prior to scientific explanation, interviews usually provide a higher response rate if the questions asked can be clarified. Interviews present the opportunity of giving a full and detailed explanation of the purpose of the study to the respondents.

The interview method ensures that the respondents fully understand what is required of them. If the respondents misunderstand a question, the interviewer can clarify it. If the respondents appear to have no interest or become detached, the interviewer can influence their interest.

It has been estimated that 90 percent of all social investigations use interviews in one way or the other (Silverman, 1997:113). The researcher used interviews as the preferred method of data collection for this study.

Interviews were conducted with the Board of Directors of the Mangaung Tourism area. The researcher made appointments with the members of the Board of Directors and 12 out of 16 (75 percent) members responded to the interviews. The researcher also organised a workshop on 14 September 2006, together with the Board of Directors and stakeholders.

1.5.2.2 Literature study

A literature study (secondary data) were conducted which entailed a review of all the elements of a strategic tourism marketing plan in the tourism industry. The following main sources were consulted:

- the South Africa Tourism research materials and reports;
- statistical tables from the South African Research Council and Central
- Statistical Services;
- text books on strategic marketing planning;
- academic journals; and
- web based searches.

1.5.2.3 Distribution of questionnaires

The following methods were used to distribute the questionnaires: door to door delivery of questionnaires; self-addressed envelopes and telephonic interviews. The researcher conducted a pilot study by distributing one questionnaire each to the Accommodation, Transport, Travel Agency and Tour Operator organisations in the Mangaung Tourism area. Out of the population of 173 tourism section stakeholders, 63 usable questionnaires were returned by the respondents. The 63 usable returned questionnaires represent a response rate of 36 percent.

Other respondents were not interested in the research. The reasons for this are discussed in the limitations of the study. According to the nature of this study, the research recommendations and conclusion did not depend entirely on the statistical response rate. However, the quality of information obtained in the questionnaires, interviews and the workshop were used together to arrive at the conclusion of the study.

1.6 LIMITATIONS OF THE STUDY

The following factors contributed to the limitations of the study:
- the unavailability of the Mangaung Tourism area board members for a workshop;
- the unavailability of stakeholders for a workshop;
- insufficient information from questionnaires;
- lack of interest of some of the stakeholders;
- lack of interest of some of the Mangaung Tourism area board members;
- lack of leadership from the Mangaung Tourism area Board members; and
- the general stakeholders' anger towards the Mangaung Tourism area Board members.

The stakeholders displayed a general anger and dissatisfaction towards the Mangaung Tourism leadership. Consequently, this led to most of the stakeholders lacking interest in completing the questionnaires, which influenced the data collection response rate.

1.7 CHAPTER OUTLAY

The following provide a layout of chapters for this study:

Chapter 1 focuses on an introduction and orientation towards the study; and includes a summary of the research design and methodology employed.

Chapter 2 focuses on various tourism activities found in the Mangaung Tourism area. A general overview of Mangaung's culture, history, arts and recreation tourism are discussed.

Chapters 3 present and discuss the factors that are critical for an organisation to succeed. Theory based on strategic planning; swot analyses; critical success factors; competitor analyses; mission statement; goals and objectives; market segmentation and competitive positioning will be discussed in the chapter.

Chapter 4 will discuss the strategies for the organisation's products, prices, distribution and promotion.

Chapter 5 will address the marketing plan. The chapter will focus on an introduction to marketing planning, functions of the marketing plan; benefits of the marketing plan; mistakes in developing a marketing plan; characteristics of marketing plans; approaches to the marketing plan; obstacles to the marketing plan; approaches to overcoming barriers to the marketing plan; summary of the marketing plan; guidelines for developing a marketing plan and relationships between the marketing plan and marketing research.

Chapter 6 will give an overview on the empirical research results. The focus will be on the interpretation of the data collected from the stakeholders and Board of Directors of the Mangaung Tourism area, based on goals and objectives; mission statement including target markets.

Furthermore chapter 6 will be based on differentiation from competitors; brand name; pricing; standards of services; distribution; promotion; personal selling; advertising; sales promotion; publicity; critical success factors; swot analyses; major competitors; positioning; priorities, and conclusion.

Chapter 7 will make recommendations and formulate a strategic marketing plan for the Mangaung Tourism area with reference to the following topics: priorities; goals and objectives; mission statement; target markets; positioning; marketing mix; areas of further research, and conclusion.

1.8 CONCLUSION

This chapter is based on the background of the study and the research methodology applied in the study. The foundation for the study was laid down in the format of the problem statement, research objectives, research methodologies and limitations to the study. The next chapter will be based on a theoretical discussion of the tourism industry in the Mangaung Tourism area.

CHAPTER 2

TOURISM ATTRACTIONS IN THE MANGAUNG TOURISM AREA

2.1 INTRODUCTION

Today, tourism is one of the biggest growing industries globally. In the year 2005, the global arrivals were a total of 843 million international trips and in the year 2006, they grew to a total of 882 million, which is a growth of 4,65 percent. Of the total, an amount of US$756,4 billion was generated out of international arrivals in the year 2005. South Africa moved from 31st position in the year 2005 to 29th position in the year 2006 on global tourism performance rankings. Table 2.1 illustrates the tourism arrivals in South Africa compared to the global competitors (South African Tourism Annual report, 2006).

Table 2.1 South Africa outperforms the global tourism growth

Areas	2006 arrivals	2007 arrivals	Difference %
South Africa	8,4million	9 million	8,3%
Africa	40,3 million	44,2 million	7,9%
Asia and the Pacific	167,1 million	184,9 million	10,2%
Europe	458,0 million	480,1 million	4,2%
Middle East	40,8 million	46,4 million	13,4%
Americas	136,3 million	142,1 million	4,7%
World	842,5 million	898 million	6,1%

Adapted from: South African Tourism. Highlights of tourism performance, (2008).

According to table 2.1, the global international growth grew by 6,1 percent and the South African arrivals grew by 8,3 percent. The South African arrivals also continued a steady growth from 8,4 million arrivals in the year 2006 until in the year 2007, it reached a 9 million mark of international arrivals. Table 2.2 indicates the economic impact of South Africa's travel and tourism.

Table 2.2 The economic impact of South Africa's travel and tourism

Area of influence	2006	2007	Difference %
Employment	896 900	941 000	5%
Foreign arrivals	8,4 million	9,07million	8,3%
Total contribution to GDP (direct and indirect)	R137,66bn	R159,6bn	16%
Asia & Australia total foreign spend per tourists in South Africa	R8 700	R9 500	1,5%
Europe total foreign spend per tourist in South Africa	R10 400	R10 500	0,5%

Adapted from: South African Tourism. Highlights of tourism performance, (2008).

According to table 2.2, in the year 2006, about 896 000 jobs were created in the tourism industry of South Africa that grew to 941 000 jobs in the year 2007. The total contribution of the tourism industry to South African GDP was R137,66 billion in the year 2006 that grew to R159,6 billion in the year 2007. The Asia and Australia total foreign spending per tourist in South Africa was R8 700 in the year 2006 that grew to R9 500 in the year 2007. The European total foreign spending per tourist in South Africa was R10 400 in the year 2007 that grew to R10 500 in the year 2007. Table 2.3 indicates the activities undertaken by tourists in South Africa.

Table 2.3 The activities undertaken by tourists in South Africa

Area of influence	2006	2007	Difference %
Shopping	86%	89%	3%
Nightlife	61%	58%	-3%
Social	42%	44%	2%
Visiting natural attractions	25%	29%	4%
Cultural, historical and heritage	21%	23%	2%
Wildlife	21%	20%	-1%
Beach	17%	20%	3%
Business	14%	13%	-1%

Adapted from: South African Tourism. Quarterly report [Q3], (2007).

According to table 2.3, tourists' shopping increased from 86 percent in the year 2006 to 89 percent in the year 2007.

The social tourists' activities also increased from 42 percent in the year 2006 to 44 percent in the year 2007. The cultural, historical and heritage activities increased from 21 percent in the year 2006 to 23 percent in the year 2007. Table 2.4 indicates the experience of tourists in South Africa.

Table 2.4 The experience of tourists in South Africa

Area of influence	Total percentages in 2007
The scenic beauty	33,66%
Visiting family and friends	32,9%
Good service	27,8%
Good medical facilities	26,9%
Value for money	24,2%
The culture and heritage	21,0%
Good infrastructure	16,2%

Adapted from: South African Tourism. Quarterly report [Q3], (2007).

According to table 2.4, 33,66 percent of foreign visitors rated the scenic beauty as their best experiences in South Africa in 2007. This was followed by visiting family and friends. About 27,8 percent of tourists felt that service standards in South Africa are good. Table 2.5 indicates the negative experiences of tourists in South Africa.

Table 2.5 The most negative experiences of tourists in South Africa

Area of influence	Total percentages in 2007
I had no bad experience	84,0%
Safety and security	6,0%
Personal safety	4,88%
Poor service in general	2,70%
Poverty	2,10%
Poor Airport Services in general	1,69%

Adapted from: South African Tourism. Quarterly report [Q3], (2007).

According to table 2.5, 84,0 percent of tourists did not experience negative occurrences while in South Africa. Security (6%) and personal safety (4,9%) were mentioned as negative experiences by the international tourists. Only 2,7 percent of international tourists mentioned poor service as a negative experience in South Africa. Table 2.6 indicates the satisfaction experienced by tourists in South Africa.

Table 2.6 The satisfaction of tourists in South Africa

Area of influence	2006	2007
Natural attractions	4,72	4,60
Accommodation	4,61	4,53
Hospitable and friendly people	4,65	4,48
General infrastructure	4,57	4,44
Domestic flights	4,41	4,42
Service levels	4,39	4,36
Availability of information	4,43	4,35
Public transportation	4,41	4,32
Safety and security	3,99	3,97

Adapted from: South African Tourism. Quarterly report [Q3], (2007).

The table 2.6 rating is based on a five-point scale where one means not at all satisfied and five means extremely satisfied. According to table 2.6, the tourists rated natural attractions at the top position on the satisfaction rating scale with a score of 4,6 out of 5 in the year 2007. Meanwhile in the year 2006, it also had a top position of 4,72 out of 5. This is followed by hospitality and friendly people with the score of 4,48 in the year 2007, whereas in the year 2006, the score was 4,65 out of 5. This is followed by accommodation with the score of 4,53 in the year 2007, whereas in the year 2006, the score was at 4,61 out of 5. Table 2.7 indicates the repeater rate by tourists in South Africa.

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Table 2.7 The repeater rate of tourists in South Africa

Area of influence	2006	2007	Difference %
First time	17,5%	17,0%	-0,5%
2-3 times	10,1%	8,1%	-2%
4-5 times	6,0%	7,4%	1,4%
6-9 times	9,8%	10,3%	5%
10 or more times	46,0%	57,3%	11,3%

Adapted from: South African Tourism. Quarterly report [Q3], (2007).

According to table 2.7, first time foreign tourists declined marginally by 0,5 percent in this quarter compared to Q3 of 2006. In this quarter, over 83 percent of foreign tourists had visited South Africa before. This means that the majority of the tourists visiting South Africa are satisfied with the service delivery hence they come back.

Table 2.8 Ten years projected annual growth of South African travel and tourism industry

Area of influence	Targeted growth 2012	Percentages %
Employment	679 200	33%
Tourism demand	R288,5 billion	4,8%
Total contribution to GDP (direct and indirect)	R194,3 billion	5,1%
Government expenditure	R1,8 billion	16%
Visitor exports	R86,2 billion	4,7%
Capital Investments	R47 billion	5,2%

Adapted from: Visser, (2005[4,1-45]:4-5).

According to table 2.8, it is projected that the South African tourism demand will grow to R288,5 billion in 2012 and R194,3 billion will be generated for the economy in general. Capital investment will reach R47 billion and R1,8 billion will be generated from government expenditure. There will be approximately 679 200 jobs created directly in the South African tourism industry. In Table 2.9 below an indication is given of the South African provincial distribution of tourist arrivals.

Table 2.9 South African provincial distribution of tourist arrivals

Province	July–September 2006	July–September 2007	Differences
Gauteng	48,0%	48,9%	0,9%
Western Cape	17,9%	17,3%	-0,3%
Kwazulu Natal	16,7%	15,2%	-1,5%
Mpumalanga	13,3%	13,3%	0
Limpopo	9,1%	7,8%	-2,7%
North West	7,1%	6,2%	-1,1%
Eastern Cape	5,1%	5,4%	0,3%
Northern Cape	4,1%	2,7%	-2,6%
Free State	8,4%	10,7%	2,3%

Adapted from: South African Tourism. Quarterly report [Q3], (2007).

According to table 2.9, South African provinces received different percentages of foreign tourist's arrivals. Gauteng's share of foreign arrivals increased from 48 percent in Q3 of the year 2006 to 48,9 percent in the year 2007. Western Cape (-0.3%), Kwazulu Natal (-1.5%), Limpopo (-2,7%), North West (-1,1%) and Northern Cape (-2,6%) all lost share of arrivals. Compared to Q3 of the year 2006, the Free State Province gained the highest growth percentage of arrivals in Q3 of the year 2007 accounting for 2,3 percent. For purposes of economic growth, the tourism industry in Mangaung needs to attract more national and international tourists visiting South Africa and the Free State Province.

The following discussion will indicate the major tourist attractions that are currently available in the Mangaung Tourism area. The discussion in this chapter is based on a database that was compiled in 2006 by Khayamandi Enterprises for Mangaung Tourism marked Annexure B, unless other sources are indicated. It must also be noted that the main discussion of the chapter is based on general information on attractions in the Mangaung Tourism area, but not on the investigation or assessment of the delivery quality of the services and attractions.

2.2 TOURISM ATTRACTIONS IN THE MANGAUNG TOURISM AREA

Mangaung Tourism area has a variety of attractions. The attractions range from man-made, to natural and historical attractions. To elaborate further on tourism attractions in Mangaung, the following discussion will focus on cultural tourism.

2.2.1 Cultural tourism

The following discussion is based on cultural tourism definition and major cultural activities in the Mangaung Tourism area.

2.2.1.1 Definition and theoretical description

Cultural tourism may be seen as that activity which enables people to explore or experience different ways of life, reflecting social customs, religious traditions and their intellectual ideas of a culture which may be unfamiliar (Kotler, et. al. 2006:199; Wikipedia, 2008:1). Cultural tourism enables local communities to showcase traditions and customs in such a manner that tourists can participate in and experience local customs first-hand. At the same time, the local community can generate money by selling souvenirs and hosting festivals.

Cultural festivals are used as a platform to educate tourists about customs and traditions by means of, for example, musical and poetic performances. Cultural festivals cover a diversity of arts and culture, including theatre, dance, music, cabaret performances, historical occasions, religious traditions and indigenous cultural heritage. The special appeal of festivals derives from their atmosphere of fun and celebration. Festivals are generally organised for a number of reasons: to enhance or preserve local culture and history; to provide local recreation and leisure opportunities; and to enhance the local tourism industry.

Festivals can be essentially community-based and thus focused on local themes and values largely aimed at attracting outside visitors (Wikipedia, 2008:1).

Guests are encouraged to attend festivals for different reasons. For example, they feel that by watching the rituals and games and partaking in a community-based experience they are given the chance to share in a real neighbourhood festivity. Festivals also seem to exert a pull on high-contact explorers who mix with the local community. These are the explorers who seek cross-cultural educational experiences.

According to the South African Tourism Quarterly report [Q3], (2007), 23 percent of international tourists visit the country for its culture. In South Africa, there are eleven cultures that are found across nine provinces. The subcultures include the Basotho, Bapedi, VhaVhenda, Afrikaners, English, Batswana, Ndebele, Nguni, Shangane, Zulu and Xhosa. South Africa is a culturally rich country and can therefore attract global tourists interested in such a destination.

2.2.1.2 Major cultural tourism activities in Mangaung

There are a number of cultural units in Mangaung including three fully-fledged major cultural centres, namely the Setshabelo Art and Craft Centre, Botshabelo Arts and Crafts Centre and Mmabana Cultural Centre. All of these are under the jurisdiction of the Free State Department of Arts, Culture, Science and Technology. In general, these cultural centres operate with a small staff complement in relation to the areas that they cover. The purpose of these centres is to preserve local artefacts and to educate local communities and visitors about cultural clothing, drawings, pottery and artworks (Personal interview. Marketing Manager of Mangaung Municipality, 24 September 2006).

The Mmabana Cultural Centre is visited mostly by schoolchildren. Although there is a general lack of interest from local communities in visiting the cultural centres in Mangaung, nevertheless international tourists visit the Mmabana Cultural Centre (Personal interview. Marketing Manager of Mangaung Municipality, 24 September 2006).

2.2.2 Arts and heritage tourism

The following discussion is based on arts and heritage tourism definition and major arts and heritage activities in the Mangaung Tourism area.

2.2.2.1 Definition and theoretical description

Arts tourism is based on being involved in, and stimulated by the performing arts as well as culture and heritage. Individuals interested in this seek to escape the routines of everyday life and wish to improve their social status and self-image (Malhotra, 2004:8-9). Arts tourism is closely related to heritage tourism. In our century, tourists are increasingly interested in arts and a heritage-based form of cultural tourism.

There is generally an increased interest amongst tourists to learn about world culture and heritage (Malhotra, 2004:8-9; Williamson and Jamal, 1996:7). Arts tourism can be regarded as a subset of cultural tourism, which includes movements of persons for the following reasons (Williamson and Jamal, 1996:8):

- study tours, including educational tours, which can be undertaken by university students to learn about arts in the country or regions other than those of their origin;

- performing arts, also incorporating musical groups, which can tour the world to display specific cultures to countries other than their home country or region;

- monuments – here one can also refer to local tourists travelling from their hometowns to another town to experience historical monuments such as the Women's Memorial Monument in Bloemfontein;

- nature study, which includes researchers from Universities travelling for the purpose of investigating sustainable eco-tourism practices in a country other than their own; and

- pilgrimages include tourists travelling for the purpose of undertaking pilgrimages around the world, for example to the pyramids in Egypt. Arts tourism is directed at the visitor's experience of paintings, sculpture, theatre and all other creative forms of human expression and endeavour. Furthermore, arts tourism activities include visiting art galleries and attending arts festivals such as the Mangaung Cultural Festival in Bloemfontein (McKercher and Du Cross, 2002:58).

There is a growing interest in arts and heritage amongst tourists because of an increasing awareness of the significance of heritage, a more pronounced influence of promotional efforts, more leisure time, greater mobility, and increased access to arts and higher levels of education. Special art exhibitions are major attractions at public art galleries and may generate substantial economic benefits for a city (Williamson and Jamal, 1996:7). Heritage tourism is based on nostalgia for the past and the desire to experience diverse cultural landscapes and forms. The term heritage can be used simply to describe things such as cultural traditions as well as artefacts that are inherited from the past (Hardy and Margrath, 1988:330).

In addition to the cultural and built environments of an area, natural heritage can also include gardens, wilderness areas of scenic beauty and valued cultural landscapes. Many world heritage sites are major tourist destinations. Visiting heritage attractions are often the main reason to travel.

Indeed, individual heritage sites such as the Notre Dame Cathedral in Paris provide the motivation for people to visit a country in the first place. Historical tourism is a main form of heritage tourism (National Trust Heritage Preservation, 2007:1).

Heritage tourism, which is based on history, tends to be education-orientated. As such, this type of heritage tourism includes guided tours of buildings, monuments and ruins, dramatic sounds and light performances and the re-enactment of historically significant occasions.

Heritage tourism also includes local cultural traditions. In addition to local cultural traditions, architecture, archaeology and natural sites, family patterns, religious practices and the subtleties of refined traditions combine in various ways to make up what is described as the heritage of a country. This community heritage embraces folklore traditions, arts and crafts, ethno-history, social customs and cultural celebrations (Hardy and Margrath, 1988:330).

2.2.2.2 Major arts tourism activities in Mangaung

In Mangaung, there are both the Bloemfontein art route and the Mangaung cultural route. There are also various different art galleries. The majority of the galleries are found in Bloemfontein, the most famous being the Oliewenhuis Art museum, a main attraction and focal point in the arts world (Personal interview, Marketing Manager of Mangaung Municipality. 24 September 2006).

According to Mr Peterson (Marketing Manager of Mangaung Municipality), there is a steady interest in art within Mangaung. This is evidenced by the fact that the various art galleries in Mangaung attract a significant number of visitors. The Mangaung Tourism authorities send visitors to art galleries in Mangaung. However, the art galleries are not effectively marketed amongst the local residents who do not seem to take time to visit them.

The researcher suggests that Mangaung Tourism combine the art galleries in Mangaung for a joint effort of marketing them in collaboration with tour operators. Mangaung tourist itineraries should not exclude art galleries (Personal interview, Marketing Manager of Mangaung Municipality. 24 September 2006).

Mangaung Tourism can develop a unique local art gallery that should incorporate local and national artworks. The location of the art gallery should be accessible from other galleries. The Mangaung art gallery could serve as a sister art gallery to private galleries where the private owners can contribute by supplying reputable artworks. This will help to promote art in Mangaung and the gallery could also refer visitors to other art galleries around Mangaung. The notion of arts tourism can play an important role when linked to the concept of outdoor tourism.

2.2.3 Outdoor tourism

The following discussion is based on outdoor tourism definition and major outdoor activities in Mangaung Tourism area.

2.2.3.1 Definition and theoretical description

Outdoor tourism involves activities that take place outside the urban areas, and may normally be associated with rural and eco-tourism. The following activities are involved: (Malhotra, 2004:244; Page and Dowling, 2002:25–29; Williamson and Jamal, 1996:7).

- Biking areas and clubs. There are many mountain bike trails in South Africa, but they are not always easy to find. Most, if not all, of the riding destinations are natural, as opposed to man-made trails that are constructed from artificial materials. Mountain biking in Cape Town is a favourite destination for many with the slopes of Table Mountain providing the ideal backdrop.

There are, however, many other destinations with great mountain ranges, such as Knysna on the Garden Route, the Drakensberg in KwaZulu-Natal, Sabie in Mpumalanga, and the Magaliesberg in Gauteng. The trails usually consist of dirt roads, jeep tracks, single-track footpaths and hiking trails. There are not many purpose-built and dedicated bike trails; most are dual purpose.

- Birding and wildlife areas. South Africa is the southernmost country on the African continent and is truly a world in one country. It boasts a coastline that stretches for 3 000 km from the border of Moçambique in the east to Namibia in the south-west. South Africa has a superb system of National Parks, Game Reserves and Nature Reserves. Protection of the numerous species of wildlife is excellent, and one may see lion, elephant, white and black rhino, giraffe, many species of antelopes, and smaller predators in easily accessible reserves throughout the country.

- Caves – underground and underwater. Perhaps the most exotic caves are the Sterkfontein Caves situated approximately 50 km from Johannesburg. These caves are also the site of some of the most important discoveries concerning the evolution of man and have been declared a World Heritage Site.

- Hiking and rock climbing. Here one can refer to, among others, the Golden Gate National Park which was established in 1963 to conserve 11 500 ha of golden sandstone cliffs and highlands along the Lesotho border with KwaZulu-Natal and the Free State provinces. Great caverns and rock shelters are home to various raptors, including the bearded vulture, the black eagle, the blue crane and the jackal buzzard. Animals to be found on the lower grassland slopes include black wildebeest, eland, red hartebeest and oribi. These areas are well suited to rock climbing and hiking.

- River rafting. The best time to enjoy river rafting in South Africa is in the warmer months, between November and May, as this is when the rivers are full from the rainy season. Some of the most thrilling white water rafting opportunities in South Africa can be found along the mighty Tugela River in KwaZulu-Natal, with the 30 km canyon offering rafters a mix of easy currents and thrilling rapids. Other great adventures include the Orange River, perfect for thrill seekers and rafting holidaymakers alike.

- Rodeo, horseback and ranching adventures in South Africa are varied and spectacular. Visitors may explore sandy beaches, vineyards and mountains on horseback. There are opportunities to enjoy wildlife, birdlife and many picturesque South African treasures whilst horse riding. The horse does the work whilst the tourist relaxes, breathes in the fresh air and admires the beautiful sights.

- Tours in South Africa offer exceptional wildlife experiences and safari destinations. Visitors can explore the wildlife-rich Sabie Sabie Private Game Reserve bordering the Kruger National Park, which offers day and night game drives.

Outdoor tourism is related to eco-tourism. Eco-tourism areas are natural areas that are undisturbed or uncontaminated and have flora and fauna. These areas deliver economic and conservation benefits to the communities. Normally, eco-tourism is developed with the idea of conserving and maintaining the natural and cultural ecosystem (Cooper and Shepherd, 1998:7).

2.2.3.2 Major outdoor tourism activities in the Mangaung Tourism Area

There are a number of nature reserves, parks and dams like the Krugersdrift Dam were water sports take place. The nature reserves are distributed relatively evenly across the Mangaung area. These parks have a small staff occupation in relation to the services rendered in the area.

The outdoor activities include adventure, water-sport, caravanning and camping, sports, guided game walks, game drives, scuba diving, fishing, hunting and bird watching (Personal interview, Marketing Manager of Mangaung Municipality. 24 September 2006).

Leisure tourists are the main visitors to outdoor facilities. The majority of these tourists are whites who tend to stay overnight while travelling to the coast or returning from coastal holidays. Visitors to outdoor facilities come from different regions. The majority reside in the Free State province; almost half come from Gauteng, and the remainder are from the Eastern and Western Cape. The visiting patterns to the outdoor facilities in Mangaung are evenly distributed throughout the year (Visser, 2005:13).

According to the Marketing Manager, Mr Peterson, the Mangaung Municipality is currently developing a department of tourism development , therefore little has been done by the Municipality in terms of ecotourism development (Personal interview: Marketing Manager of Mangaung Municipality. 24 September 2006). After looking at outdoor tourism, the following discussion will focus on conference and business tourism.

2.2.4. Conference and business tourism

The following discussion is based on conference and business tourism definition and major conference and business tourism activities in the Mangaung Tourism area.

2.2.4.1 Definition and theoretical description

According to Rogers and Peppers (1998:16-17), conferences can be used as an appropriate tool by any organisational group like the private and public sectors, corporations, trade associations, scientific or cultural societies wishing to confer, exchange views and, consequently, to convey a message, open a debate or give publicity to some area of opinion on a specific issue.

No tradition, continuity or periodicity is required to convene a conference. Table 2.10 illustrates the extent of business/conference tourism in South Africa.

Table 2.10 Tourists' purpose of visit by province in South Africa.

Provinces	VFR	Business tourist	Business traveller	Shopping	Holiday
Gauteng	24%	8%	15%	22%	23%
Western Cape	16%	6%	11%	3%	59%
Eastern Cape	18%	11%	10%	2%	53%
Kwazulu Natal	23%	5%	9%	24%	32%
Mpumalanga	12%	3%	7%	24%	47%
Limpopo	11%	1%	4%	38%	40%
North West	36%	14%	8%	12%	21%
Northern Cape	30%	4%	12%	8%	42%
Free State	40%	3%	2%	20%	7%

Adapted from: South African Tourism. Quarterly report [Q3], (2007).

From Table 2.10, it can be derived that 40 percent of VFR tourists visited the Free State province. There were 20 percent shopping tourists, 3 percent business tourists, and 2 percent business travellers who visited the Free State province in the year 2007. The business tourism and business traveller are a very important component of economic growth in the Mangaung area.

The Mangaung area as an urban area in the Free State Province should therefore be prepared to take advantage of this business market. The development of the planned international convention centre in Mangaung may be a positive move towards accommodating this international market. Although not generally limited, conferences are usually of a short duration with specific objectives. Conferences are generally on a smaller scale than congresses. Conference tourism may also involve a component of leisure (Personal interview, Senior Marketing Manager of Mangaung Municipality. 03 September 2006).

Conference attendees may, for example, choose to take excursions to local restaurants and entertainment places, or go on sightseeing tours as a way of relaxing after a working day. In this manner, delegates will have an opportunity to socialise on an informal basis (Rogers and Peppers, 1998:18-19).

The conference conveners and business tourism may sell their destinations with an emphasis on the entertainment, culture, leisure, shopping and sports facilities available. The benefits of conference and business tourism include greater economic income, all year round activities, long-term investments and environmentally friendly tourism (Rogers and Peppers, 1998:18-19).

2.2.4.2 Major forms of business and conference tourism in Mangaung

The conference sector in Mangaung primarily consists of guest houses, hotels, guest farms and tertiary institutions. Amongst others, there are conference facilities on the premises of the Mangaung Municipality, the Central University of Technology, Free State, the Free State University and the Sand du Plessis Theatre (Personal interview, Senior Marketing Manager of Mangaung Municipality. 03 September 2006).

According to the Senior Marketing Manager of Mangaung Local Municipality, Mr Claassens, business and conference tourism is currently one of the largest tourism activities in Mangaung. The business and conference centres are normally booked throughout the year. Mr Claassens also feels that Mangaung Tourism should be positioned as a conference destination rather than a holiday destination. An international convention centre is to be erected in Mangaung because of the considerable demand in that sector. The only disadvantage is that Mangaung Tourism does not put much emphasis on promoting conferences and business tourism in and around the Mangaung Tourism area (Personal interview, Senior Marketing Manager of Mangaung Municipality. 03 September 2006).

The current Mangaung Tourism area stakeholders are private and public tourism businesses. Given the fact that Mangaung is planning to construct an international convention centre, it may accommodate the fast growing business market. The conference and business tourism drift can be, to some extent, related to conference and events tourism.

2.2.5 Events tourism

The following discussion will focus on events tourism definition and major events tourism activities in the Mangaung Tourism area.

2.2.5.1 Definition and theoretical description

Events tourism is anything that happens, as distinguished from anything that exists; it may also be an occurrence, especially one of great importance. Within the tourism industry, there are a variety of events that include carnivals, festivals, training days, trade exhibitions, environmental days, art displays, fireworks displays, music festivals, career exhibitions and street parties (Tassiopoulos and Damster, 2000:50; Watt, 1998:1).

The aim of hosting events is to attract more tourists to a town and to encourage local communities to participate in various activities. The objectives should be specific, measurable in terms of statistics, achievable to those participating, and relevant to the resources that are currently available. The timing of an event should also be accurate (Watt, 1998:2).

According to Saayman and Saayman, (2004:29), there are specific goals that will motivate an event to be held, such as:

- increased community pride;
- strengthening of values and traditions;
- marketing benefits, such as positive image creation;
- increased community involvement;

- intercultural interaction;
- extending the tourism season; and
- economic benefits/impacts.

According to Strydom, et. al. (2006:1), arts festivals can be categorised as a form of events tourism and are currently more popular in South Africa than ever before.

2.2.5.2 Major forms of events tourism in Mangaung

According to Strydom, et. al. (2006:1), events tourism has a major economic impact in Mangaung. For instance, the Volksblad Arts festival alone generates more than R18 000 000 for Mangaung. The Mangaung Cultural Festival (MACUFE) has a major impact on the economy of Mangaung. It is regarded as one of the best event in Mangaung because it attracts visitors from all over the country to this area.

The two Bloemfontein festivals (MACUFE and the Volksblad Arts Festival) are considered as successful festivals in Mangaung. Bloemfontein has more superior venues for festivals than Botshabelo and Thaba Nchu. The Sand du Plessis, Wynand Mouton and Albert Wessels theatres in Bloemfontein have excellent facilities for hosting festivals. Bloemfontein, unlike other cities that host festivals, is easily accessible given its location on the N1, making it a less stressful experience for festivalgoers in terms of moving from one place to another (Personal interview, Senior Marketing Manager of Mangaung Municipality. 03 September 2006).

There is a need for Mangaung Tourism to market the Mangaung area as an events destination. Mangaung has a variety of cultures, which make it an ideal events destination. According to Mr Claassens (Senior Marketing Manager), the Municipality needs to budget for sufficient funds for promotional purposes.

Currently, the festival and events organisers carry the responsibility of marketing events to the target markets (Personal interview, Senior Marketing Manager of Mangaung Municipality. 03 September 2006).

2.2.6. Historical tourism

The following discussion is based on historical tourism definition and major historical tourism activities in Mangaung Tourism area.

2.2.6.1 Definition and theoretical description

Historical tourism is a form of heritage tourism. According to Gartener (1996:316), historical tourism is reflected by means of museums, monuments, historic sites, man-made structures and other physical reminders of past events that contain evidence of previous civilisations or important periods of history. Urban tourism areas preserve historical buildings on the premises of tourism attractions so that they can educate visitors about the background of their city. For example, in the United States of America the destruction of the World Trade Centre in September 2001 is commemorated annually as part of historical tourism. The South African government erected the Hector Petersen Memorial museum as part of historical tourism in Soweto to educate visitors about the slaughtering of the scholar political activists on 16 June 1976 by the South African Police (Lucille, 2008:1 and Cable News Network(CNN), 2008:1).

2.2.6.2 Major forms of history tourism in Mangaung

There are a number of museums in Mangaung that are under the control of the national and provincial government's Department of Arts and Culture. The majority of the museums are located in Bloemfontein. The biggest of these is the National Museum, followed by the South African War Museum and the Afrikaans Literature Museum (Visser, 2005: 71-70).

Museums mainly provide educational services. Schoolchildren are the main market for these museums and therefore mainly educational services are offered. Interestingly, race plays a significant role regarding the visitor numbers of museums in Mangaung. Black visitors tend to visit those museums that do not put a great deal of emphasis on history and those that do not attach historical elements. The South African War Museum by far receives the largest number of national and international visitors (Anglo Boer War Museum, 2008).

According to the Public Relations Officer of the Women's Memorial Museum, historical tourism in Mangaung is currently one of the main motivations for tourists visiting Mangaung. There is also a township route with a new development of museums containing a rich history. The township route has a positive future because of the growing history market. History tourism in Mangaung also generates a good income for the city (Personal interview, Public Relations Officer of the Women's Memorial Museum. 02 September 2006).

Currently, however, Mangaung Tourism does not market history tourism effectively (Personal interview, Public Relations Officer of the Women's Memorial Museum. 02 September 2006). The funds made available by the Municipality for museum projects are limited, and therefore the progress of museums is delayed. There is a need for the Mangaung municipality to speed up the process of updating the history museums since they only incorporate old South African history that is not suitable for post-1994 South Africa (Personal Interview, Public Relations Officer of the Women's Memorial Museum, 02 September 2006).

2.2.7. Supportive facilities

The following discussion is based on supportive facilities in the Mangaung Tourism area.

2.2.7.1 Accommodation in the Mangaung area

According to Table 2.11, accommodation in Free State sold 911 834 beds per night. The Mangaung area, as an urban region in the Free State province, needs to take economic advantage of the accommodation sector. The accommodation establishments in the Mangaung area are normally fully booked during major events in Mangaung. This proves that there is not yet sufficient accommodation to cater for the large number of visitors in the area. Furthermore, South Africa will be hosting the 2010 Soccer World Cup and it is estimated that over 21 million tourists will flood into South Africa over a period of six months.

The Mangaung area as one of the hosts of the 2010 Soccer World Cup will need to extend the number of available accommodation places in the area.

Table 2.11 illustrates bed nights sold in South Africa.

Table 2.11 Bed nights spending per province in South Africa

Provinces	2006	2007	Difference %
Gauteng	4 765 382	5 664 610	18,8%
Western Cape	3 952 562	4 252 117	7,5%
Eastern Cape	856 998	1 031 012	20,3%
Kwazulu Natal	2 040 051	2 068 160	1,3%
Mpumalanga	1 060 383	1 004 175	-4,6%
Limpopo	801 818	713 404	-8,8%
North West	442 993	454 276	2,5%
Northern Cape	321 824	282 187	7,6%
Free State	672 257	911 834	35,6%

Adapted from: South African Tourism. Quarterly report [Q3], (2007).

According to table 2.11, it can be seen that South Africa generates good capital from beds sold every night in the accommodation sector.

Free State as a province is doing well in terms of the number of beds sold per night with 672 257 beds sold in 2006, which grew to 911 834 beds sold in 2007 accounting for a 35,6% increase. Most of the accommodation varies from one star to five stars. The accommodation is often fully booked during the major events such as sports and cultural festivals in Mangaung area. Table 2.12 presents the number of accredited accommodation places in Bloemfontein.

Table 2.12 Graded accommodations in Mangaung Tourism area

Category	Total
Bed and Breakfast	23
Guest Houses	54
Self catering	10
Country House	4
Hotels	12
Lodge	8
Caravan and camping	1
Backpacker and hostelling	0
MESE	0
Total	**112**

Adapted from: Tourism Grading Council SA, (2008).

According to table 2.12, the majority of the graded accommodation units are guest houses (54). According to Mr Peterson (Marketing Manager of Mangaung Municipality), service in the Mangaung accommodation sector ranges from bad to excellent. Normally those that are not yet graded with stars by the South African Grading Council offer bad to good service and those that have been graded offer excellent services. The variety of services offered in the accommodation sector makes accommodation affordable to all types of markets (Personal interview, Marketing Manager of Mangaung Municipality. 24 September 2006).

Accommodation in Mangaung is one of the major employers of people from local communities. It is projected that with the coming development of the international convention centre and the 2010 Soccer World Cup, the accommodation sector in Mangaung should expand so that it can accommodate a larger number of visitors (Personal interview, Marketing Manager of Mangaung Municipality. 24 September 2006).

2.2.7.2 Entertainment facilities in the Mangaung Tourism area

In the Mangaung area, entertainment facilities are in a great demand from visitors as well as the local communities. This is evident when looking at the statistics in Table 2.13.

Table 2.13 Visiting Friends and Relatives (VFR) tourists spending in the Free State province.

Category	Rand total VFR tourists	Per capita	Percent ages
Transport	R101 237 511	R77	61%
Accommodation	R4 690 515	R4	3%
Food	R35 035 537	R29	23%
Entertainment	R10 992 703	R8	6%
Gifts	R9 076 675	R7	6%
Total	R161 032 941	R125	100%

Adapted from: Visser, (2005:32)

According to Table 2.13, the Visiting Friend and Relatives tourists spend over R161 032 941 per year in the Free State province – a huge spending and boost for the economy of the Mangaung Tourism area. The transport sector is the largest, followed by the food sector in the second place. The entertainment sector is in third place and the gift sector, which includes shopping, is in fourth place.

The accommodation sector is in fifth place. The Mangaung Tourism area should therefore use a package-type of tourism product offering such as selling, shopping, transport, entertainment and accommodation together.

There is variety of entertainment venues for visitors and local communities in Mangaung. The entertainment sector of Mangaung Tourism area can be categorised into restaurants, fast food outlets, theatres and cinemas, pubs and sports facilities. Restaurants in Mangaung are responsible for a major financial injection in the local economy. The sector is one of major employers of people from local communities. Restaurants in general are highly affordable and easily accessible in Mangaung (Personal interview, Senior Marketing Manager of Mangaung Municipality. 03 September 2006).

The restaurants offer a variety of cuisine to choose from, and the township restaurants also offer African cuisine that is ideal for the international market. According to Mr Claassens (Senior Marketing Manager), restaurants attract more customers in the evenings and over weekends. When there are events in the Mangaung area, restaurants are usually in great demand (Personal interview, Senior Marketing Manager of Mangaung Municipality. 03 September 2006).

Cinemas play a major role in the entertainment sector of Mangaung. Approximately one third of the economic injection comes from the theatres and cinemas. During holidays, weekends and events days, theatres and cinemas are in great demand. The market consists of local communities and stopover visitors (Personal interview, Senior Marketing Manager of Mangaung Municipality. 03 September 2006).

There are places for relaxation such as taverns in the townships, and pubs in the town area. However, nightlife is not safe since crime is escalating in Mangaung. Some of the taverns also organise live performances. These live performances attract visitors from outside Mangaung who eventually stay overnight and spend money in the area (Personal interview, Marketing Manager of Mangaung Municipality. 24 September 2006).

2.2.7.3 Sports

Vodacom Park sports complex is the main sports venue in the city and in the province. There are several other sports venues in the city, including facilities belonging to the University of the Free State, schools and sports clubs. Currently, Vodacom Park is earmarked to host soccer games during the 2010 Soccer World Cup.

2.2.7.4 Shopping

According to Table 2.13, the gift sector which forms part of shopping, accounts for more than R9 million and thus contributes towards a significant economic injection in the Free State Province. The Mangaung area as the urban area in the Free State Province is directly and indirectly affected by this economic gain. Mangaung offers a variety of goods to customers like national and international designed sports clothing for men and women, gold/diamond jewellery, national and international reputable furniture and a variety of other commodities (Personal interview, Marketing Manager of Mangaung Municipality. 24 September 2006)..

Currently, the shopping sector is one of the economic boosters of Mangaung. There are more than five shopping malls that offer shopping facilities. The Mimosa Mall, Southern Plaza and the Waterfront Mall are the three main shopping complexes in Mangaung. However, none of the shopping malls in Mangaung has a retailer offering local products for tourists, such as South African souvenirs and artefacts (Personal interview, Marketing Manager of Mangaung Municipality. 24 September 2006).

2.2.8 CONCLUSION

The aim of this chapter was to provide an overview of tourism attractions in Mangaung. Descriptions and analyses of the existing tourism attractions, which affect the marketing and development of the tourism system in Mangaung area and the future ability of these attractions to sustain the tourism demand, were presented. Strategies for further development of these products will be discussed in Chapter 6 as part of data analyses, and further integrated in Chapter 7 for the Mangaung Tourism area strategic marketing plan.

CHAPTER 3

STRATEGIC PLANNING ISSUES

3.1 INTRODUCTION

Tourism today is a major contributor to the world economy. By the close of the twentieth century, international tourism was generating well over $450 billion annually. The global tourism industry has been estimated to be worth some $3,5 trillion. It is estimated that 8,2 percent of the world's workforce is employed in the tourism industry, accounting for 207 million jobs worldwide in an industry responsible for 700 million international tourists. It is also expected that by 2020, international tourism will be generating up to $2 trillion a year (World Travel and Tourism Council, 2006).

The large cities need to take advantage of this tourism growth for economic benefits. According to Law, (1993:1), large cities across the world are the most important tourist destinations. Urban areas have the ability to attract visitors across the world with facilities such as museums, shops, theatres, sports, local communities complemented by high standards of resources, urban areas with sustainable tourism development and economic growth in general.

3.2 STRATEGIC PLANNING

Drummond and Ensor (2001:3) define strategic planning as specification of timing of the proper moment to apply strategy, selection of strategies necessary to achieve goals, the allocation of resources needed to make the strategy a success and sequencing of strategies required to achieve objectives.

According to Jain (2000:9), strategy in an organisation is, "The pattern of major objectives, purposes, or goals and essential policies and plans for achieving those goals, stated in such a way as to define what businesses the company is in or wants to be in and the kind of company it is or is to be". Strategy gives direction that all members of the organisation relate to. Strategy is about deployment of potential results and development of reaction capability to changing environments.

In essence, strategic planning is a tool that the organisation may use to organise the resources, operations, goals and objectives in a manner that they cooperate to achieve a common goal. Figure 3.1 indicates a conceptual framework for strategic marketing planning in tourism. This chapter will deal with strategic planning issues such as:

- critical success factors;
- situation analysis (Swot-analyses);
- mission and goal formulation;
- target marketing; and
- competitive positioning.

The marketing mix strategy, as indicated in figure 3.1, will be dealt with in chapter 4.

Figure 3.1: Conceptual Framework for strategic marketing planning in tourism.

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┌─────────────────────────────────┐
│     CRITICAL SUCCESS FACTORS     │
└─────────────────────────────────┘
                 │
                 ▼
┌─────────────────────────────────┐
│        SITUATION ANALYSIS        │
└─────────────────────────────────┘
                 │
      ┌──────────┴──────────┐
      ▼                     ▼
┌──────────────┐      ┌──────────────┐
│ Environmental│      │   Resource   │
│   Analysis   │      │   Analysis   │
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┌─────────────────────────────────┐
│      URBAN GOAL FORMULATION      │
│           Urban Mission          │
│            Urban Goals           │
│          Urban Objectives        │
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│    URBAN STRATEGY FORMULATION    │
│   Tourism Business Unit Analysis │
│      Urban Portfolio Analysis    │
│ Product-Market Expansion Strategy│
└─────────────────────────────────┘
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┌─────────────────────────────────┐
│     TARGET MARKETING STRATEGY    │
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┌─────────────────────────────────┐
│      COMPETITIVE POSITIONING     │
└─────────────────────────────────┘
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│       MARKETING MIX STRATEGY     │
│          Product Strategy        │
│          Pricing Strategy        │
│        Distribution Strategy     │
│         Promotion Strategy       │
└─────────────────────────────────┘
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Adapted from: Heath and Wall, (1992:1).

3.3 CRITICAL SUCCESS FACTORS

According to Johnson and Scholes, (1999:192), critical success factors can be defined as parts of the strategy where the organisation should be ahead of the competition. Parts of the strategy include factors like good funding, good services and location issues.

In essence, critical success factors are factors that are critical for the effective functioning and operation of an organisation. An organisation cannot function or do without the critical success factors. These factors result in an efficiency of operation and profitability within an organisation. The organisation that is ignorant of critical success factors might end up having to decide not to continue with its operations due to a lack of profitability and mismanagement.

The following steps may be followed as part of the process of determining critical success factors (Johnson and Scholes, 1999:193):

- critical success factors should be manageable (maximum of six factors). If the organisation has many critical success factors, it becomes impossible to achieve their productivity within a reasonable time frame;

- identify the core efficient foundation with the ability to win competitive advantage. The organisation should focus on aspects that will put them ahead of competition. The core efficiencies are the aspects that the organisation cannot do without, for example financial resources, infrastructure and human resources; and

- any move that the competitor makes, like introducing a new product into the market, may have an impact on the organisation. Therefore, the response mechanisms should always be in place.

When the critical success factors are in place, the organisation may then focus on analysing the current situation in the business through the swot analysis technique.

3.4 SWOT ANALYSIS

SWOT is a business acronym standing for Strengths, Weaknesses, Opportunities and Threats. SWOT analysis is a technique used to identify and empower the organisation's opportunities and strengths and respond to weaknesses and threats to obtain a competitive edge and better profitability (Bennet, 2000:147 and McDonald and Payne, 1998:109-113). SWOT analysis also seeks to analyse current environments and future environments so as to identify threats, opportunities, weaknesses and strengths for the urban tourism area and tourism business units at large.

Changes in economic, political, technological, competitor and demand environments can have a major influence on the organisation. Therefore, the swot analyses become important in terms of anticipating the influence of environments. Figure 3.2 depicts a link between the environmental and resources analysis.

Figure 3.2: Urban Analysis
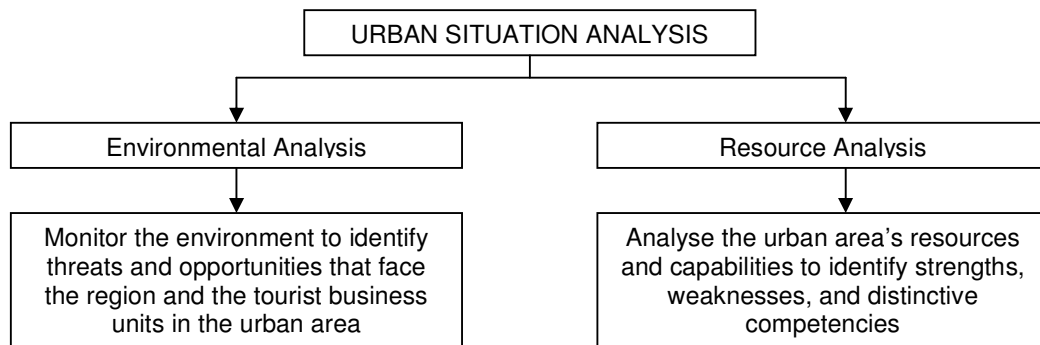
Adapted from: Heath and Wall, (1992:30)

As a guideline in completing a SWOT analysis, the organisation should identify internal and external business factors that are critical for success.

Below is an example of a SWOT analysis checklist that an organisation may use (table 3.1).

Table 3.1. Example of a SWOT analysis checklist/table

Strengths	Weaknesses
Competitive advantages	Obsolete facilities
Ability to innovate	Lack of management depth
Distribution system	Low brand name image
Marketing skills	Weak marketing image
Brand name recognition	Low research and development
Cost advantages	capabilities
Financial strength	Below-average marketing skills
Complete product line	Lack of financial muscle
Reputation/image	High operating costs
	Shaky reputation/image
Opportunities	**Threats**
Expand product line	New competitors
Enter new markets	Slowing market growth
Diversify to broaden risk	Changing needs of customer
Improve buyer/supplier relationship	Adverse demographic changes
Improve technology	Weakening economy
Improve regulatory/legal climate	• Unfavourable
Favourable demographic changes	• regulatory environment.

Adapted from: Bennet, (2000:147)

After an organisation has completed a SWOT checklist, it may target the external environments for analysis. This could be done through environmental scanning.

3.4.1. Environmental Scanning/analysis

According to Heath and Wall (1992:43), environmental scanning is an instrument used to analyse aspects influencing the organisation from outside such as the socio-cultural, political, technological and economic environments.

The environmental analysis also seeks to identify strengths, weaknesses, opportunities and threats in the organisation that includes key competitors and prominent future markets. The organisation that does not scan the environments runs a risk of becoming a victim of an unfavourable environment that will result in a waste of financial resources and opportunities.

According to Bennett, (2000:160) and Kotler, et. al. (2003:114), the business environment today can be classified into three components: the macro environment, which is the external environment, the market environment and the microenvironment, which is the internal environment. Figure 3.3 shows the relationship between the environments.

Figure 3.3: The Micro, Market and Macro environment relationship
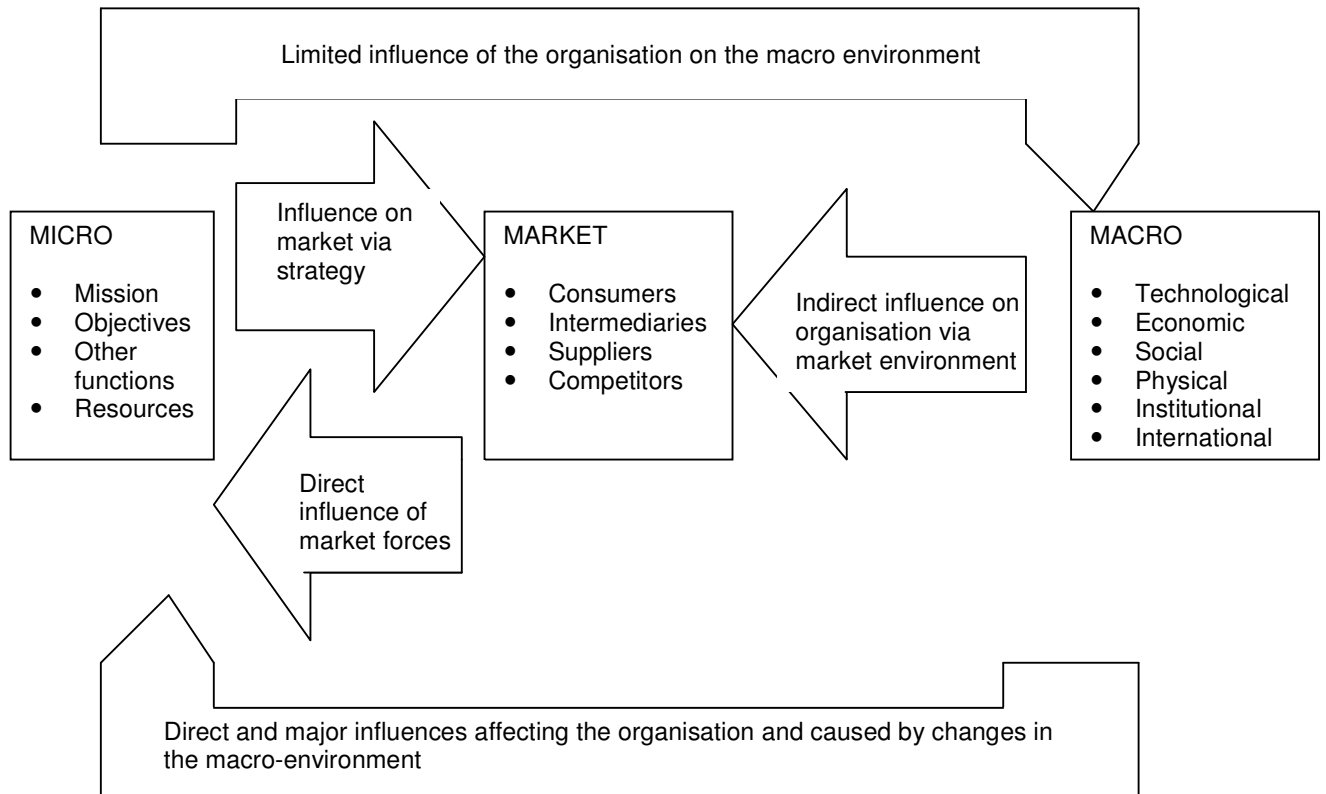
Adapted from: Bennet, (2000:160)

The micro environment consists of factors which the organisation can control that include organisational resources like finance and staff, mission statement, objectives and management. The market environment on the other hand, is made up of factors that the organisation can partially control, like suppliers and markets. The macro environment consists of factors that influence the organisation from outside its boundaries and the organisation has no control over the macro environments. The following aspects make up the macro environment: military, technological, physical, social, economic, international, demographic, political and international environments (Bennet, 2000:161; Heath and Wall, 1992:51).

The different business environments will be discussed as follows:

3.4.1.1 The market environment

The following discussion will be based on the elements of market environment.

a) The market

The market is orientated around identifying means to satisfy customer needs. An organisation that fails to satisfy the customer needs will suffer a disaster. Urban tourism organisations need to know the needs of their market and their buying power and behaviour. Knowing the needs of the market will result in the organisation's ability to produce relevant products and quality services for the customers. By identifying specific needs of the market, an organisation will be able to develop relevant marketing messages to that market segment (Bennet, 2000:162; Drummond and Ensor, 2001:24-27).

b) Suppliers/Intermediaries

Urban tourism areas depend on different suppliers to satisfy tourist's needs. So, for instance, a holiday resort will be supplied by private sector businesses (butchery) with meat, and food. The municipality supply companies with electricity. Therefore, there must be communication with the suppliers to secure good quality products for the urban tourism areas (Drummond and Ensor, 2001:24).

c) Competitors

The competitor's actions may change from time to time. The product manager should have in place constructive evaluation criteria that must be implemented from time to time to monitor the competitor's actions (Drummond and Ensor, 2001:24).

3.4.1.2 The macroenvironment

The macro environment differs from the microenvironment in the way that it is difficult to predict changes from time to time. The following aspects constitute the nature of the macro environment (Palmer, 1994:35):

- The external environment is without boundaries and changes are taking place from time to time. A lack of sufficient finances in the organisation diminishes the chance of anticipating the macro environment. An organisation should prepare itself financially through investments that are directed to anticipating the external environment.

- The macroenvironment has weak environmental signs. It is difficult for the organisation to identify the impact of the changes in the macro environment at an early stage therefore, managers discover changes after they have occurred.

- External environments are uncontrollable in nature. Managers can do nothing to stop the impact of external environments but to adapt to them. Normally organisations do not posses full domination over environmental factors. Natural disasters like storms will have a negative impact on a nature resort and there is nothing a manager can do to control the damage caused but only to adapt to the situation (Aaker, 1998:24).

- The macroenvironments are divergent and require diversity of expertise. When the manager is faced with diverse macro environments that he has to deal with, he should get expertise to help anticipate the relevant environment. If the damage is in the product design, the manager should get product experts to handle the problem.

The following are external environments that may be a challenge to the organisation:

a) The demographic environment

Demography may be defined as "the study of human populations in terms of size, density, location, age, gender, race, occupation and other statistics" (Cooper and Boniface, 1994:24).

The following aspects greatly influence the South African population:

i)   The race groups diversity

According to Statistics South Africa, (2007), there are four races: Blacks (38 079 900), Whites (4 352 100), Indians (1 173 700) and Coloureds (4 245 000) within the total population of 47, 9 million. Blacks are not yet developed in terms of tourism due to a lack of sufficient income and private transport. However, the situation is currently changing since many opportunities to travel and job opportunities with disposable income are being made available to Blacks. Tourism product marketers should do market research among Blacks to identify their preferences in terms of tourism products and send marketing messages to them (compare Cohen, 1995:19; George, 2001:36).

ii)   The population age structure

According to Statistics South Africa, (2007), about 13 004 600 of the Black community are younger than 14 years old, with 1 617 400 above 65 years. A total of 1 099 700 of the white community was younger than 19 years and 575 300 of the white population was 65 years. It is expected that by the year 2010 there will be more than 2, 5 million people at the age of 65. People over the age of 65 and higher are able to travel since they have more money. The tourism product marketers should analyse the needs of the people in terms of travelling preferences and also treat senior citizens (65 years and older) as a unique market segment.

iii) Urbanisation and dispersion of the population into cities

According to George, (2001:38), most of the South Africa's population is concentrated in urban areas. The Gauteng province in South Africa has the largest number of people residing within its boundaries. The other neighbouring provinces should market their tourism destinations extensively so as to win tourists from the large Gauteng province if they have suitable products for this market.

iv) Size of the household

The household size has a role to play in market segmentation. The smaller households spend less money and have the ability to travel. When the product managers focus on small households as the target market this will bring more profit into the business because the smaller families have more money to travel. The bedroom facilities sold to the smaller households in South African accommodation facilities can form a market for the accommodation industry, more especially among the white families with disposable income, where there is a tendency to keep small households of four people so they will have more money to spend on travel.

This will result in less spending in the smaller families. The business manager should therefore determine the household sizes in the market segment and target those who have smaller households with disposable income and market with the goal of accumulating more profit (Cohen, 1995:25; George, 2001:39).

b) The cultural and social environment

According to Woodruffe, (1995:232), the cultural and social environment affects the way people live and behave. Amongst the values that they list in this environment are the languages people speak, the type of education they have, their religious beliefs and the type of food they eat.

This includes the society's style of housing, family sizes and beliefs about marriage (Drummond and Ensor, 2001:23; Pitt, 1998:30).

i)   Cultural and religious differences

In every race group, various subgroups can be found, like Muslims, Hindus and Christians. Furthermore, in South Africa, there are eleven languages. The manager will have to decide on promotional activities and services offered that would suit everybody. The product manager must have a variety of food, for example for Muslims who do not eat pork, to have an alternative like vegetables (Cohen, 1995:19; George, 2001:43).

ii)   Educational levels

According to Marx and Van der Walt (cited in Bennet, 2000:170), "the higher the educational levels, the higher the level of development". In South Africa, the minority groups enjoy adequate education whereas the majority still do not have good education. The better qualified the person, the better the income and that makes the educated people a better target market for taking holidays. The marketing manager should have in place tour packages that will also cater for the less well-educated, for instance additional cultural attractions may be used (Cohen, 1995:26).

iii)   Changing roles of women in the society

In the past, women seldom had chances of employment. However, recently more women are climbing up the organisational ladder. Indications are that woman executives will represent a substantial market segment in future. The product manager should therefore have in place a product that will cater for the needs of women and include marketing messages that will be relevant to the women segment (George, 2001:43; Theobold, 1994:147).

c) The economic environment

The economic environment seeks to address issues that affect the economic progress of the industry at large, and to include factors such as exchange rates and income per capita (Palmer, 1994:36).

i)   Exchange rates

The South African currency is weaker compared to developed countries like America. This is therefore advantageous for tourism since it becomes expensive for local people to travel overseas and becomes cheaper for overseas tourists to visit South Africa. So local people will tour through their own country and this brings economic growth (Cohen, 1995:28; George, 2001:40; Woodruffe, 1995:232).

ii)   Inequalities in income and increase in per capita income

In South Africa, the minority groups earn larger salaries than the majority group. The product managers should have in place tour packages that will be affordable for those who earn an average income. Domestic travel will be a better option for the nationals since it is more affordable to travel within their country (Cohen, 1995:26; George, 2001:40).

d) The physical environment

South Africa has good tourism accommodation including, five star hotels, airport facilities, caravan parks, modern coaches and good road networks. The tourist manager should take these aspects into consideration and adapt to these environmental features through collective tour organising, for example in South Africa, South African Airways will have agreements with Holiday Inn and Thompson's Tours to offer packages to the tourists (Bennet, 2000:175).

e) The political government environment

There are several tourism acts passed by the South African parliament. These include the Tour Guides Act of 1978, Tourism Act of 1996, and Travel Agents and Travel Agency Acts. The manager should familiarise himself with these acts and legislations to be aware of precepts and prohibitions contained in these acts (Drummond and Ensor, 2001:23; Palmer, 1994:37).

f) The international environment

The current weak rand makes tourism affordable in South Africa to the international market and also enhances the success of large global scale conferences hosted by South Africa. The success of international events held in South Africa creates a good impression on visitors from international communities who visit our country. Product managers in the domestic tourism industry should adjust services to meet the international standards so as to satisfy the needs of the foreign tourists (Bennet, 2000:183).

g) Technological environment

Tourism has benefited greatly from technological inventions like motorcars and airplanes. The invention of computers also influences the tourism industry. Managers should also be aware of the disadvantages of technological innovations as it can mean retrenchment of employees since they will be replaced by technology. On the other hand, the manager should not be ignorant of opportunities that technology may present. The technological developments can mean an opportunity to innovate in terms of quality service delivery. In a hotel, the use of an electronic reservation system could maximise fast service to the customers. There will be no need for the long queues at hotel reservations (Cohen, 1995:28; Drummond and Ensor, 2001:23; George, 2001:40; Palmer, 1994:39).

h) The military environment (safety and security)

The military and police environment in South Africa is highlighted by events such as the murder of two German tourists in Soweto, the murder of Chris Hani of the Communist party and senior members of the ANC in 1993, and the bombing of the Victoria and Alfred Water Front in Cape Town. Incidents such as these create a bad perception of the country, since the tourism industry is fragile. The tourism product managers should have strategies in place to adapt or respond to such occurrences (Cohen, 1995:28; George, 2001:44).

3.4.1.3 Urban environmental scanning procedure

The product manager can use the following process for scanning different environments:

Figure 3.4: Urban environmental scanning procedure

External Environment
- Political
- Social
- Economic
- Ecological
- Technological

Seek exposure

Broad Trends

Delineate

Relevant Trends

Undertake

In-Depth Analysis of the significance of Trends

analyze

analyze

forcast

Impact on Product Market

forcast

forcast

New Opportunities

Direction of trends in the future

Product/Market Momentum with Trends

Product/Market Momentum without Trends

strategic action

strategic action

strategic action

Regional Strategic Marketing Planning

Adapted from Heath and Wall, (1992:44)

55

Figure 3.4 shows the steps to take in the environmental scanning process:

- The organisation should observe trends prevailing in the different environments.
- Environmental trends can either be an opportunity or threat to urban tourism. Thus, a thorough observation on trends should be done to determine the type of trend.
- Future focusing on environmental trends should be done and if the environmental trends seem to be important for the benefit of urban tourism offerings, it is vital to determine the course they will take.
- The product manager should analyse new opportunities prevailing from environmental trends that may not be relevant but present a new opportunity to the urban tourism offering, for example the developing markets that were not part of the tourism offering before.
- The urban strategic planning process can be related to the results or outcome of the environment as a trend. When the product manager has scanned the environment, the results thereof could be used to develop a suitable marketing plan (Heath and Wall, 1992:45).

The product managers may consider the following approaches to expose the external environments and changes facing the urban tourism organisation.

The first approach will be the irregular approach that could be done on an ad hoc basis to anticipate changes affecting the organisation. The second approach is the regular approach, which involves periodic surveys done within the business to identify external environmental changes. The periodic approach creates a proactive attitude in decision making for the urban tourism organisation. Thirdly, the continuous approach that includes regular monitoring of environmental factors provides good information for decision-making and strategy formulation. The continuous approach will be the best to analyse trends. Trends are unpredictable and therefore need regular evaluation so that the management is not caught by surprise.

The product managers should analyse in which way the trend is influencing the organisation (Jain, 2000:131-132). This will allow the product manager to know where to initiate the process of responding to the trends. When the organisation has undergone the process of scanning the environments then the product managers may look into possible opportunities and threats facing the organisation.

3.4.2 Opportunities and threats

Opportunities are those favourable conditions that the organisation should take advantage of to increase productivity. Opportunities take place outside the organisation. Threats are those unfavourable external conditions that affect the organisation. The organisation does not have control over the threats or the opportunities. The only solution to anticipate threats is for the organisation to follow an adaptation strategy. If the urban tourism organisation does not adapt to threats they may retard the operations of the organisation and eventually result in unwanted loss of finances (Heath and Wall, 1992:13, Johnson and Scholes, 1999:98).

When evaluating opportunities and threats facing the organisation, managers should consider changes in the environment resources, like finances and abilities of the organisation, because the organisation cannot respond effectively to opportunities and threats if it does not have proper skills and resources. To evaluate the level of impact and probability of occurrence of opportunities and threats, the probability of occurrence matrix diagram will be used. The matrix has eight factors that are critical for the organisation's success. If the organisation has more than eight critical success factors, the other critical success factors are left out because they do not have a high level of occurrence and have a low impact on the organisation. This is illustrated and explained further in figure 3.5.

Figure 3.5: Probability of occurrence matrix

PROBABILITY OF OCCURRENCE

	High	Low
High	6 5 1	 3
Low	2	 4

LEVEL OF IMPACT

Adapted from: Bennet, (2000:168)

Figure 3.5 demonstrates environmental issues facing a hotel frequented by foreign visitors in January 1994 in South Africa:

1. South Africa first democratic elections causing a national stay away in 1994.
2. The general improvement in the South African economy.
3. The new airports development in major cities.
4. The South African Airways introduction of more overseas flights
5. The 1994 South African first democratic elections creating a decrease in foreign tourists visiting South Africa.
6. More casino resort to be opened in the South African neighbouring countries like Swaziland.

It should also be noticed that the above aspects are not necessarily critical success factors in all cases. This depends on the issues facing the organisation at the given time. According to figure 3.5, the eight factors as described from 1 to 6 shows that the hotel has a high level of occurrence and impact of critical success factors with regard to 1, 5 and 6. The matrix shows that there is a low level of occurrence of 3 and 4 and a low impact of occurrence of 2.

To measure the level of impact of opportunities and threats, the organisation should answer three questions (Bennet, 2000:168):

- does representation as critical success factor to the organisation pose an opportunity or threat? For instance, will the issue of national elections bring profitability to the organisation or not. This is needed to find out the measure in which the organisation will be affected by the national elections;
- when will the event occur? For example, if the petrol prices increase, will this happen in the low or high season of the organisation; and
- the product manager should find out which market areas will pose opportunities and threats to the organisation. Are there any threats and opportunities impacting on the services of the organisation's product?

The opportunity/threat profile will be used to answer the first three questions. The profile will demonstrate the possible profit impact and possible time of occurrence of the opportunities and threats issues on the organisation. This will be shown in figure 3.6.

Figure 3.6: Opportunity/threat profile
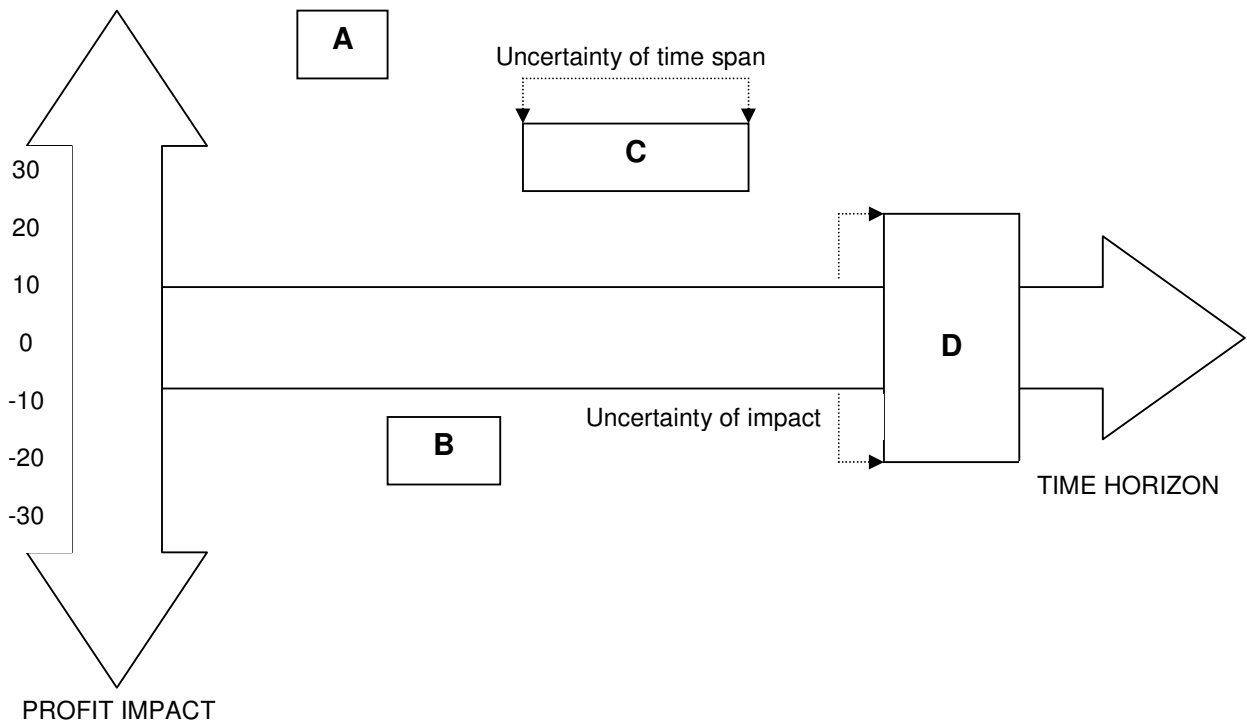
Adapted from: Bennet, (2000:189)

Figure 3.6 is explained as follows:

0 = measures an issue that an organisation does not have evidence of its impact on it.

10 to 30 = measures the evident impact on the organisation caused by the positive issue that is happening.

-10 to –30 = measures the evident impact on the organisation caused by the negative issue that is happening.

In figure 3.6, issue A is likely to happen in the near future with a positive impact on the organisation's profits. Issue C will also have a positive impact on the organisation but it is not clear when it will impact on the organisation. In the case of issue D, it is not clear whether it will occur and whether it will have a positive or negative impact on the organisation.

Issue B is likely to happen in the near future with a negative impact on the organisation's profits.

3.4.3 Internal analysis

According to Thompson and Strickland (cited in Bennet, 2000:167): "Assessment of the internal environment requires an analysis of an organisation's existing and accessible resources in order to determine its performance capabilities" (Aaker, 1998:18). An urban tourism area can do an internal analysis by asking themselves the following questions (compare Coyle, 2004:90-93):

- human resources: What is the number of employees, level of qualifications and experience? (Aaker, 1998:18);

- financial resources: The product manager may ask if the projects have to wait until adequate finances are available (Aaker, 1998:18, Reed, 1997:86);

- physical resources: The product manager may ask what the product is able to offer (Aaker, 1998:18; Reed, 1997:87); and

- operational administration may ask what type of members the organisation needs, what type of operational and administrative structures are needed. Strydom, (1992:128) as well as Reed, (1997:85-88) and Aaker, (1998:121-129), stipulate the following factors that the tourism organisation needs to consider for internal environmental analysis:

- quality and variety of attractions;
- availability of suitable accommodation;
- quality services availability;
- availability of entertainment;

- ability to buy company basic facilities; and
- availability of recreation and entertainment.

3.4.4 Strengths and weaknesses

Strengths are where the organisation is doing well in terms of service delivery and resources above its competitors. Strengths happen inside the organisation. The organisation should focus on developing continuously to stay ahead of its competitors. Strengths can be controlled (Cooper and Lane, 1997:66).

Weaknesses are the constraints the organisation experiences in terms of moving towards a certain direction. Weaknesses, like strengths, are internal of nature. The organisation should improve on its weaknesses to obtain a competitive edge.

Weaknesses can be improved on by finding out where the organisation is performing poorly and set up long- and short-term strategies to achieve better standards (Cooper and Lane, 1997:67 and Coyle, 2004:88-89).

The next step in the strategic planning process for a tourism business is the formulation of a competitor profile.

3.5 COMPETITOR ANALYSIS

The competitor analysis is the process where the organisation assesses its services, products and sales against its competitor's business abilities with the aim of identifying whether the competitor is doing better. According to McDonald and Payne, (1998:248), competitors may be classified as follows:

- leadership. The competitive organisation is excellent in all aspects like services and managerial operations;

- strong. The strong competitor is able to maintain an independent strategy that does not put at risk their short-term position and the variety of strategies;

- favourable. The favourable competitor can be seen in a service market niche as exploiting a specific competitive strength with more opportunities to develop their position and having several strategies to their advantage; and

- tenable. The tenable competitor's continuation in business depends on their performance; they can either develop for the better or withdraw from the business.

When the organisation analysis is completed, the factors that affect competition should be taken into consideration (figure 3.7).

Figure 3.7: Forces that affect competition
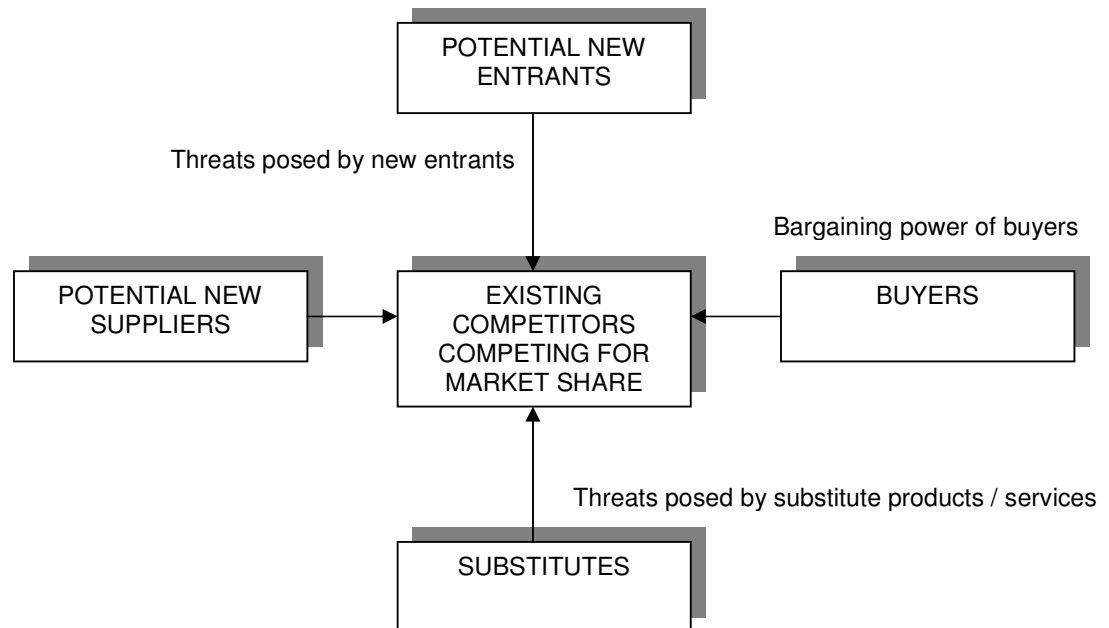
Adapted from: Drummond and Ensor, (2001:25)

The forces that affect competition factors based on figure 3.7 are discussed as follows (Drummond and Ensor, 2001:25):

- existing competitors compete for the same tourist's money and free time. An example is that of a guesthouse competing with a hotel in the same town for the same customer. The customer may choose to stay in a guesthouse rather than staying in a hotel since a guesthouse is viewed as an alternative to a hotel (Bennet, 2000:162);

- potential competitors are all new hotels entering the market, thus adding new capacity to the industry. These competitors are eager to capture market share, thus creating more intense competition. In the hotel industry specifically, it is difficult for the new entrants to enter the market (George, 2008:44);

- substitute products pose a threat since they are alternative products performing the same function as far as the customer is concerned. For example, the prospective tourist may choose to stay at a guesthouse rather than at a hotel (Bennet, et. al. 2005:102);

- bargaining strength of suppliers is when a limited number of suppliers serve one industry. For example, in the restaurant industry South African Breweries as the main supplier of beer can constitute a large part of sales thus making SAB a powerful supplier. The supplier bargaining strength may make it impossible for the company to impose high price increases (George, 2008:44); and

- the bargaining strength of buyers is when the customers influence the company price and service delivery with their needs and wants. Customers are in need of best prices, quality services and improved products. For example, a tour group will always be on the look out for special services like specially prepared meals (Drummond and Ensor, 2001:25).

In analysing competition for tourism products, a competitor profile grid can be used. Here the organisation and its major competitors are evaluated according to factors important for similar organisations to be successful (critical success factors). These factors will have a specific weight given to them with regard to their order of importance and all of these weights must add up to one (1). The total scores will depict the competitive leader in those success factors, therefore depicting the competition.

Figure 3.8: Competitor Profile Grid

CRITICAL SUCCESS FACTORS	W	COMPETITOR A		COMPETITOR B		COMPETITOR C	
		E	T	E	T	E	T
1. Good Representation	0.2	4	0.8	4	0.8	3	0.6
2. Sufficient Funding	0.2	1	0.2	4	0.8	3	0.6
3. Research and Structured Information	0.2	2	0.4	3	0.6	3	0.6
4. Networking	0.1	3	0.3	3	0.3	2	0.2
5. Effective Marketing	0.3	3	0.9	3	0.9	2	0.6
TOTAL	**1.0**		**2.6**		**3.4**		**2.6**

W = weight, E = evaluation on the scale 1 – 5, T = weight x evaluation

Adapted from: McDonald and Payne, (1999:24)

According to figure 3.8, the competitor is evaluated as follows:

1 = very poor

2 = poor

3 = acceptable

4 = good

5 = very good

Each critical success factor is first weighted against the first competitor and then evaluated also against the second competitor and the weight multiplied by the evaluation resulting in the total. After compiling the competitor profile grid the organisation may ask the following questions as a guide to interpret results from the grid: Who is my major competitor? In which areas are they performing better?

In which areas am I performing poorly? Am I doing good? What must be done to improve my weak points? What must I do to strengthen my strong points and stay ahead?

The organisation will then have a direction to formulate strategies. The results of the competitors' profile should enable the organisation to identify factors that will need more serious attention. These factors are called priorities and give an indication in which areas the business should focus over the short to medium term.

The next step in strategic tourism planning is the formulation of a mission statement.

3.6 MISSION STATEMENT

The mission statement becomes important in the strategic planning process when the organisation needs to define where it is headed and how it is getting there.

McDonald and Payne, (1998:57) define a mission statement as "an enduring statement of purpose that provides an animated vision of the organisation's current and future business activities in service and market terms, together with its values and beliefs and its points of differentiation from competitors".

The mission statement objectives will be as follows (Drummond and Ensor, 2001:127-134; Harrison, 2003:122-124; Thompson, 2001:194.):

• to ensure cooperation and purpose within the organisation;
• to motivate the utilization of resources within the organisation;
• to create a coordinated and balanced organisational climate;
• to become a focal point to those who are focused on the business mission;
• to expose those who do not comply with the mission;

- to have in place a work structure originating from objectives and goals attached to tasks to be performed;
- to have time and performance assessed;
- to have in place a specific organisational purpose; and
- to translate purposes into goals that are achievable.

When the organisation develops the mission statement, the previous experiences of urban tourism should be taken into consideration.

Figure 3.9. depicts a hotel mission where customers receive a good quality service, staff's recognition, supplier partnership and shareholder growing in terms of shares, resources reliability and Government regulations compliance with high standards.

Figure 3.9: Stakeholders' mission statement for a Hotel

Customer / Service Quality

Suppliers / Partnership

Staff Internal Recognition

HOTEL MISSION

Stakeholders Growth Reliability

Referral / Resources

Government Regulations
Compliance
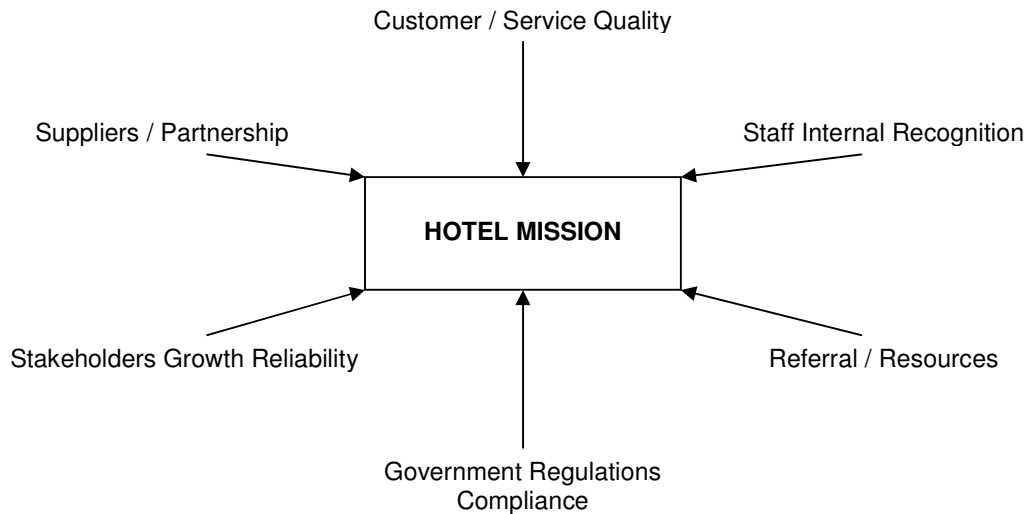
Adapted from: McDonald and Payne, (1998:59)

3.6.1 Criteria for developing mission statements

According to Heath and Wall, (1992:65-66), there are various aspects that need to be taken into account when developing urban tourism mission statements:

- the past tourism experiences, urban historical background and tourism industry stakeholders should be involved when developing the mission;

- the characteristics of the urban tourism environment. For example, if the safety of tourists is the major concern in the urban environment then it must be addressed in the mission statement;

- the lack of tourism resources can hinder the possibility of mission statements realisation. For example, the Free State Province in South Africa is unlikely to become the surfing mecca of South Africa;

- the urban tourism business stakeholders, tourism public, local government and community organisation preferences must be taken into consideration; and

- the mission statement should be based on the urban area of excellence. For example, if the urban tourism excels in coastal tourism, it must be emphasised in the mission statement.

The next step in the strategic marketing process in tourism is to formulate goals and objectives.

3.7 GOALS AND OBJECTIVES

It is necessary to bring clarity between two loosely used terms, goals and objectives in companies for the purpose of the marketing plan. A marketing objective is a statement that exposes and outlines what is to be achieved by the company's marketing activities and strategies. Goals are a means by which the organisation needs to achieve marketing objectives (Cambridge Training and Development Manual, 1996:137; McDonald and Payne, 1996:60).

To create marketing objectives and strategies, the swot analyses may be used to obtain the strengths, weaknesses, opportunities and threats. Objectives should be targeted towards the organisation. The objectives may have sub-objectives in support of the main objectives.

Long-term objectives should be relevant to the organisation's mission statement and should be clear and specific with an achievement time frame. The corporate objectives should be measurable and be specifically focused on the target market and services it wishes to serve and address (Heath and Wall, 1992:71-72). The objectives should be practical and able to integrate the organisation and staff members. Experts recommend the following four possible actions to develop marketing objectives:

• selling existing services to existing markets;
• extending existing services into new markets;
• developing new services for existing markets; and
• developing new services for new markets.
  (Cooper and Shepherd, 1998:85; Lancaster and Massingham, 1996:29-30).

The following areas in a tourism business normally need objectives (Figure 3.10):

Figure 3.10: Areas that need objectives
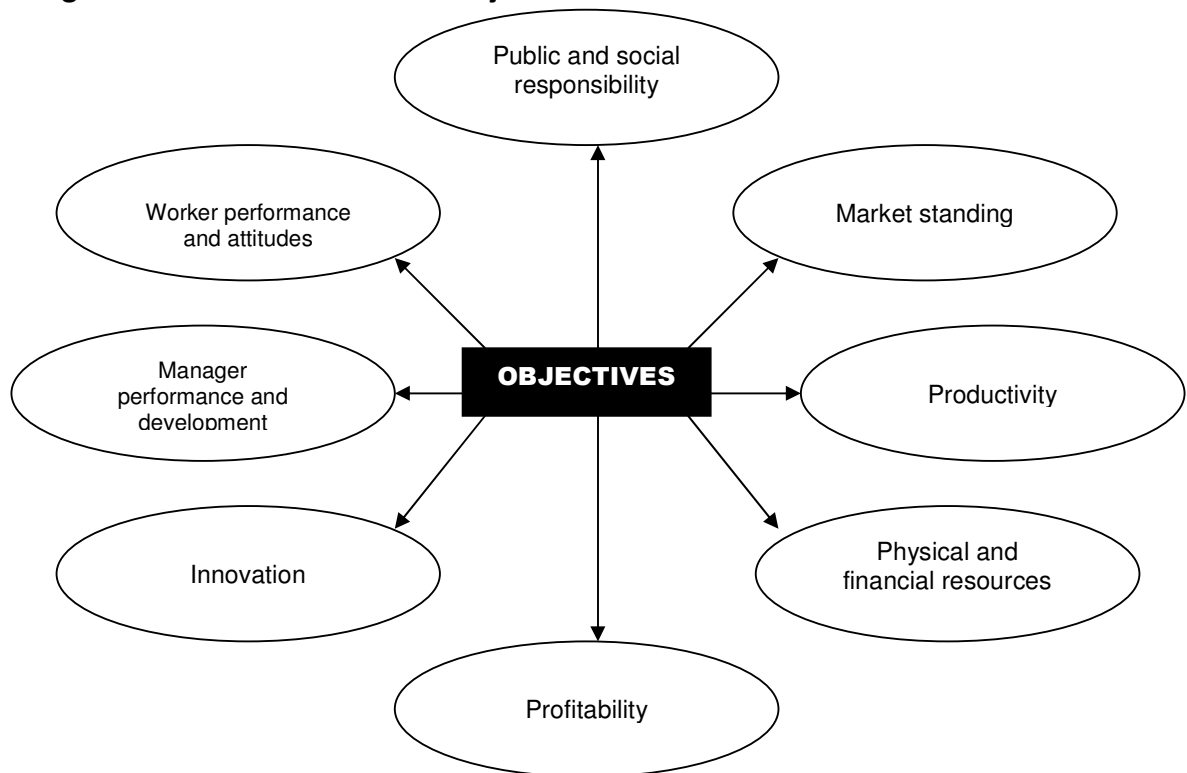
Adapted from: Bennet, (2000:151).

Objectives and goals should be subdivided into short-term, meaning achievable within the next six or twelve months, and long-term objectives, which means they will be achieved after five years. For each objective, there should be a person responsible (Strydom, 1992:131).

When an organisation deals with objectives, it should avoid poor levels of credibility, motivation or feasibility, narrow information and ignoring different options. According to Bennet, (2000:150-151), there is a need for objectives in a business in the following areas:

3.7.1 Market Standing

The decision depends upon the business as to what products it wants to sell and markets it want to serve.

For example, a hotel may decide to extend their services with a restaurant as a short-term goal for the next year and in the long-term extend their service into a one-stop hotel (Drummond and Ensor, 2001:136).

3.7.2 Productivity

The productivity of the organisation will be determined by the total amount of input (e.g. cost) compared to the output (profit). The organisation may decide to use shareholders' finances for the first six months and build a profit base for the next five years (Drummond and Ensor, 2001:136).

3.7.3 Financial and physical resources

The organisation should strategise in terms of how the finances should be generated and utilised. The organisation in the short-term may obtain a loan from the bank to cover costs for the next six months and charge the customers service fees to build up a financial base (Drummond and Ensor, 2001:136).

3.7.4 Innovation

Innovation is necessary for the organisation to cope with changing customers' needs and wants. Products and services need to be upgraded with modern technology and information technology like Internet reservations in a hotel (Poon, 1993:266-282).

Management may decide to use the manual reservation system at the front desk for the first six months and upgrade to electronic reservation systems for the next five years.

3.7.5 Manager's performance and development

It is important that the managers should perform excellently since this will enhance productivity within the organisation. The organisation may decide to offer training to management in leadership for the first six months and extend the course to cover other topics like conflict management, and relationship marketing for the next five years (Baum, 1993:27).

3.7.6 Staff performance and attitudes

The better skilled the staff is, the better they will offer quality service. Management may decide to give staff members once a month training in customer care and extend to other training, e.g. problem solving for the next five years (Evans, et. al. 2003:72).

3.7.7 Social and public responsibility

The organisation may take social and public responsibility to retain the staff and customers and enhance its image. The public relations manager may organise the sponsorship of the local small business industries for the first six months and sponsor big sport events for the next five years (Holloway, 1998:331).

According to Pearce and Robinson, (1997:111), it will be a risk for the organisation to take one of these areas of objectives as overriding. For example, Protea Hotels concentrated more on competitive positioning objectives against its competitor, Sun International. This led to profitability decline until Protea Hotels corrected the situation by focusing on all areas that need objectives like public and social responsibility. Therefore, the organisation should equally satisfy all areas that need objectives.

3.7.8 Profitability

The satisfied staff is likely to keep the customer happy by delivering quality services. The happy customers will then become loyal to the organisation and this will positively impact the organisation profitability in the long run (Kotler, et. al. 2006:46).

When the organisation has formulated goals and objectives, then the product managers may start focusing on market segmentation.

3.8 MARKET SEGMENTATION

Market segmentation is a process of dividing a total perceived market into segments and in each market segment, group individual customers who have common characteristics, similar demands and needs for the products or services (Bull and Mike, 1993:11-25; Coltman, 1989:176-192; Fridgen, 1996:167-168; Johnson and Thomas, 1992:8-18).

Heath and Wall, (1992:93) suggest that market segmentation should be based on four assumptions:

- each market segments' members have unique preferences and needs;
- one product like skiing, will be favourable to specific segments rather than to other markets;

- potential tourists with similar characteristics can be grouped into segments; and
- specific product offerings can be developed to reach specific target markets by destination and tourism businesses.

According to Coltman, (1989:182-186), Heath and Wall, (1992:94) and Theobold, (1994:16) there are four categories of market segmentation which will be discussed in more detail.

3.8.1 Geographic Segmentation

The market is subdivided by location and the different needs and preferences of tourists are considered. Since these preferences and needs differ depending where tourists live, the following criteria may be used: climate, population density, local, national or international markets, size of city and urban or rural area. Strydom, (1992:45) suggests three practical implications to be taken into consideration, based on the above-mentioned variables:

- the distance of the tourist product from the tourists is important. Tourists need a convenient travelling distance to a destination;
- tourists' actual residences can influence the type of accommodation preferred. Tourists coming from urban areas will prefer different types of accommodation from traditional urban accommodation; and
- the financial resources requirements when focusing on promotions for international markets should also be considered. For example, the weak South African currency is making it expensive to market products to international markets.

3.8.2 Demographic segmentation

According to Cooper and Boniface, (1994:23-25), demographic segmentation focuses on the following aspects of the market:

- age;
- average family size;
- gender;
- income;
- level of education;
- vocation;
- race;
- religion; and
- nationality.

Demographic segmentation is a powerful tool that will make it easier for the organisation to penetrate the market because the organisation will be able to identify specific needs, wants and demands of the market it is targeting by means of different market categories, like: age, income, level of education, religion, nationality and vocation. This will allow the organisation to be exposed to the needs and wants of the market. When the organisation knows the needs and wants of the market, it can easily penetrate the market.

3.8.3 Psychographic segmentation

Psychographic segmentation focuses on segmenting the market with personality traits or lifestyle characteristics. This type of segmenting can expose reasons why tourists visit a specific destination. Mill and Marrison (Heath and Wall, 1992:96) suggest "Demographic data may be likened to the bones of a skeleton and psychographic data may be likened to the flesh.

The bones form the basis of structuring, but it's only by covering the forms with flesh that the features become recognisable. Information about a tourist's attitudes, interests and opinions can give a much closer picture of the segment being described."

The VALS (V=value; A=attitudes; LS=lifestyle) typology was developed in the eighties to extend psychographics segmentation (Heath and Wall 1992:97). Figure 3:11 illustrates the VALS topology.

Figure 3.11 The VALS typology
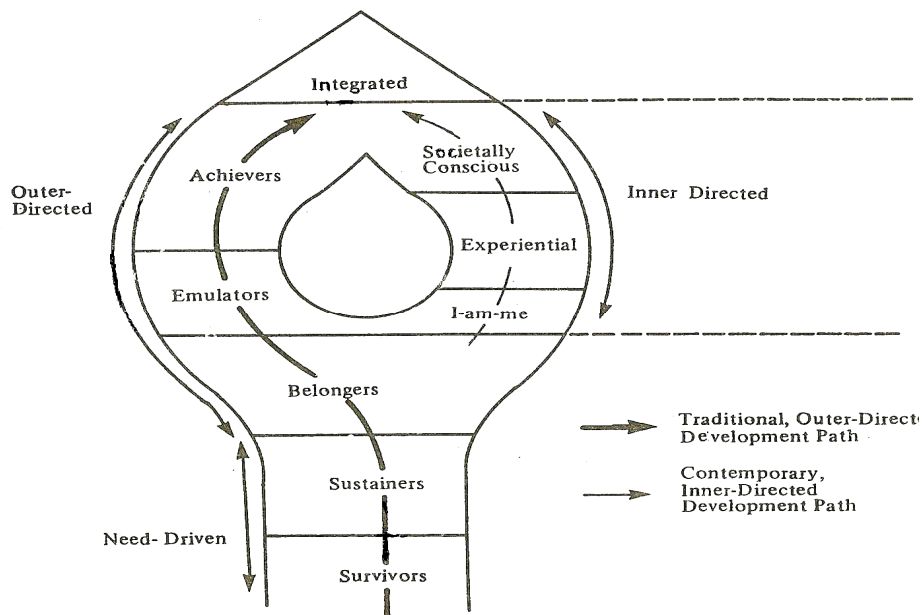
Adapted from: Heath and Wall, (1992:98)

Each of the nine lifestyles depicted in figure 3.11 are discussed as follows:

- survivors – old, poor, misfits;
- preservers – angry and resentful;
- belongers – aging, deeply stable;
- emulators – youthful, ambitious;
- achievers – middle-aged, prosperous;
- i-Am-Me – young, impulsive, dramatic;
- experiential – seek direct experience, artistic;

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- societal conscious – mission orientated, successful; and
- integrated – tolerant and understanding.

The entire above-mentioned variables of the VALS typology can form a unique market segment. By a unique market segment, it means the tourism product manager may integrate all the markets into one market with a product offering that satisfies the needs and wants of the market.

3.8.4 Behavioural segmentation

Behavioural segmentation is developed from psychographic segmentation and focuses on the study of tourists' behaviour towards the product. The other side of behavioural segmentation is benefit segmentation, which focuses on the benefits tourists receive from product offerings. Benefit segmentation may include variety, prestige and accessibility. As a point of departure of market segmentation, benefit segmentation may be used complimented by psychographics, geographic and demographic data with an idea of having an in-depth profile result of each market (compare Kotler, et. al. 2006:272-276 and Heath and Wall,1992:100).

Traditionally, tourism product owners made use of either demographic segmentation or geographic segmentation or a combination thereof. For example, the guesthouse owner may decide to target high-income families (demographic) from Gauteng (geographic).

According to Heath and Wall, (1992:103), the following aspects are used as criteria for the determination of market segments:

- executability – The market segment strategy should be unique enough before promotion efforts take place;
- accessibility – The existing promotion campaigns and methods of distribution channels should have the ability to react to the market;

- measurability – How many active and potential tourists are there in a specific market that could be targeted;

- substantiality – Availability of sufficient number of tourists in the segment to support marketing efforts;

- defensibility – Do the characteristics of tourists in the segment match the marketing efforts directed to them;

- stability – In the event of environmental changes, the market should remain unique and stable; and

- feasibility – The aiming of different elements of the marketing mix to a single market segment should be able to draw that market's interest to the relevant marketing mix component.

After the organisation has the market segmentation in place, they can start developing positioning strategies.

3.9 COMPETITIVE POSITIONING

When the organisation has segmented its market successfully, then the organisation should position itself in the eyes of the consumers against the competitors.

According to Payne, (1993:95) positioning can be defined as a differentiated point where the organisation positions itself against the competitor as superior in the mind of its target market.

Positioning gives meaning to the product in terms of what it stands for, what is the benefit that can be derived from the product, and sets product evaluation criteria for customers (Fridgen, 1996:256; Bennet, et. al. 2005:223).

Drummond and Ensor, (2001:183-184) suggest the following range of approaches to positioning:

- positioning by attributes – this positioning approach is based on what the customer sees as benefit in association with a product, the product benefit is emphasised to attract the customer. For example, Heinz company products are positioned on the attributes of non-artificial preservative, flavour or colouring (George, 2008:160);

- positioning by price – this positioning approach is used when a high price is perceived as quality. For example, the Hilton Hotel positioned room rates high to reflect quality (Bennet, et. al. 2005:223);

- positioning associated with user – this positioning approach is used when the product application is associated with the user. For example, Ecover cleaning products are positioned as environmentally friendly products for the environment conscious customers (George, 2008:160);

- positioning by the product benefit – this positioning approach is used when a product is associated with the customer. For example, Volvo positions itself using the product benefits of durability and safety (George, 2008:160);

- product class positioning – this positioning approach is used when tourism is positioned as a way of life rather than luxury. For example, Kellogg's Nutrigrain bars are positioned as morning bars, a substitute for the traditional breakfast (Drummond and Ensor, 2001:183-184);

- competitor positioning – this positioning approach is when the slogan is used to position the company. For example, Avis used the slogan, "we are number two, so we try harder" to position itself in the market (George, 2008:161);

- position by symbol – this positioning approach is used when a symbol is used to position the company. For example, Esso Petrol Company has used the symbol of the tiger to position itself in the business environment (Drummond and Ensor, 2001:183-184);

- position by origin – this positioning approach is used when reputation is used to position the product. For example, Audi uses the German slogan "Vorsprung durch technik" hoping that the customer will link the product to the German reputation for quality engineering (Drummond and Ensor, 2001:183-184);

- positioning by personality – this positioning approach is used when a product is positioned by means of personality. For example, Harley Davidson motorbikes are positioned as a macho product (Bennet, 2000:206); and

- positioning by usage occasions – this positioning approach is used when the product is positioned by means of usage occasions. For an example, SPAR supermarkets are positioned for usage after normal hours near to the customer's homes (Bennet, et. al. 2005:223).

The positioning approaches are available for the company to decide which one will be the best to apply based on the business environment prevailing. Payne, (1993:114) suggests important factors for successful positioning:

- credence – the attributes exposed to the consumers must be believable. For example, a nuclear power generator cannot position itself as environmentally friendly;

- competitiveness – the product should be unique to the customers. For example, Herbal Essence was launched in the presence of the competitor Pantene in 1995; however in 1997, Herbal Essence ranked number two behind Pantene;

- consistency – the positioning message should be the same for a long time so as to establish a position against the competitors; and

- clarity – the product message should create a clear differentiated position in the minds of the consumers. A message of "finger licking good" differentiates KFC from competitors.

Figure 3:12 explains the positioning process.

Figure 3.12: The positioning process

1. Positioning concept
The product (brand) meaning derived from the needs of the buyers comprising the target market.

4. Positioning effectiveness
The extent to which management's positioning objectives are achieved in the market target.

Market Target

2. Positioning strategy
The combination of marketing actions used to portray the positioning concept to targeted buyers.

3. Brand positioning
The positioning of the brand by the buyers in the target market.

Adapted from: Cravens, (1994:305)

Step 1: Selecting the positioning concept

According to Cravens, (1994:304), the positioning concept is, "The general meaning that is understood by customers of its relevance to their needs and preferences." The positioning concepts should therefore be intertwined with the customers' needs and wants. There are three forms the concept may have:

- functional concepts are consumption needs related products;
- symbolic concepts are linked to consumers' self enhancement needs; and
- experiential concepts relate to recreational products. (Cravens, 1994:306; Payne 1993:96).

Positioning approaches are as follows (Craven, 1994:307; Heath and Wall, 1992:120; Drummond and Ensor, 2001:183-184; Bennet, et. al. 2005:223):

- **Attribute, relating to product features**

The product manager should use product features to market the product. For example, Singapore Airlines impressive in flight features like the physical outlook of the interior of the airline, seats and staff may be projected to the public with a motive of stimulating desire and action from the customer side, in terms of using the product (George, 2008:160).

- **Price/quality**

Various prices linked to positioning objectives may be used. The product manager should use value based pricing to attract consumers. The manager of Kentucky Fried Chicken (KFC) should consider the costs (total amount paid for the product by the company) and the competitor (Nandos) current price for the same product and what the customer is willing to pay.

KFC should then price at least below the competitor's (Nandos) price and above their costs for profitability purposes and less than the amount customers are willing to pay (Cravens, 1994:307).

- **Use or application**

The brand is positioned in terms of how it works. The product manager must pass marketing messages that will convince the customer that the product meets his expectations. For example, Formula 1 Hotel marketed with attractive beds and competitors labelled with uncomfortable beds in their rooms (Bennet, et. al. 2005:223).

- **Product class**

The product is positioned with another brand with similar class. The product manager may use popular public figures to market the products. The Carousel Hotel marketed itself with the famous political leader Nelson Mandela as having used their accommodation (Bennet, 2000:206).

- **Competitor**

The brand goes against the competition in positioning. The product manager should have sufficient information about the competitor and develop strategies to gain a competitive edge. For example, Avis positioned itself as number two against the 'giant' Imperial car rental firm (Bennet, et. al. 2005:223).

Step 2: Choosing the positioning strategy

According to Cravens, (1997:204), the positioning strategy collects the total amount of resources to be used in a marketing programme and gives direction on how to use these resources amongst the marketing mix components (product, distribution, promotion and price). The implication is that there will be many alternatives depending on the deployment of resources.

The following are factors affecting the positioning strategy (figure 3.13):

Figure 3.13: Factors influencing the choice of a marketing positioning strategy.
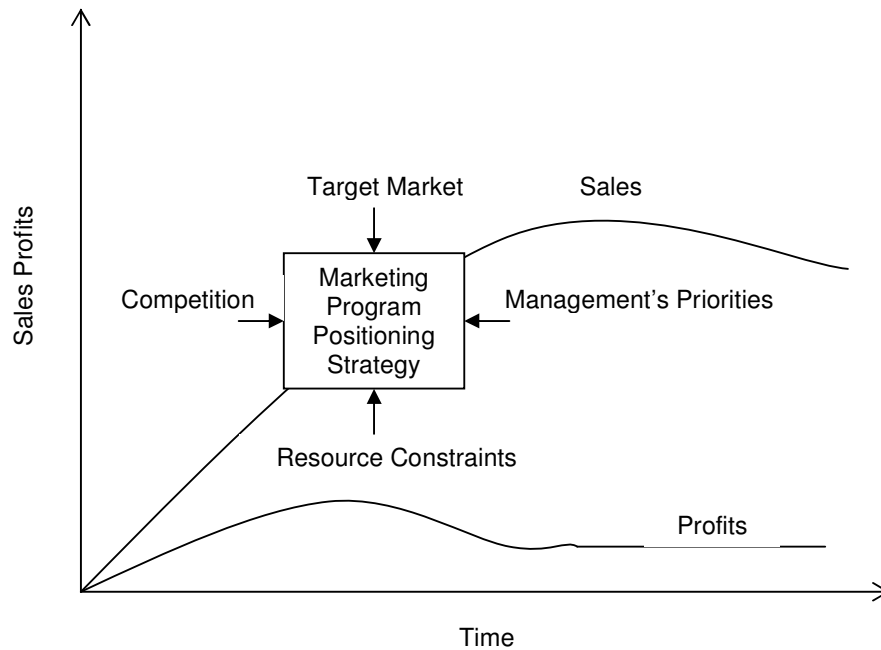
The following issues are evident from figure 3:13:

• **The target market**

The target market's characteristics expose the nature of marketing messages that should be directed to them (Palmer, 1994:284-285).

• **Product life cycle stage**

The product life cycle stages will help in terms of the proper respond mechanisms needed by the organisation since these stages change from time to time (Bennet, 2000:211-213).

- **Management priorities**

Management priorities may be one-sided, focused and ignorant about most important aspects. For example, the focus may be on market share with an ignorance of product, promotion, distribution strategies, resource and competitive influences (Lazenby, et. al. 2004:10).

Step 3: Combining the positioning components

Figure 3.14 shows the major strategic guidelines in combining the positioning components.

Figure 3.14: Positioning strategy overview

Product positioning strategy			Product / service strategy	
Product objectives	Channel of distribution of objectives		Distribution strategy	
Brand strategy	Type of channel	Price position relative to competition		Marketing program positioning
Product management strategy	Distribution intensity	How active will price be	Price strategy	
Advertising/sales promotion role and objectives	Channel configuration	Pricing objectives		
Creative strategy	Channel management strategy	Price management strategy		
Media and programming strategy			Advertising and sales promotion strategy	
Advertising management strategy		Role and objectives of sales force		
		Size and deployment strategy	Sales force strategy	
		Sales force management strategy		

Adapted from: Cravens, (1997:207)

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In the explanation of figure 3.14, an illustration is used of company A in terms of how it combines marketing mix components into a coordinated strategy (compare Cravens, 1997:205-206; Bennet, 2000:206):

• **Product strategy**

A company may have product strategies aimed at positioning the company in the eyes of the customer against the competitor. The product strategy includes factors like unique restaurants, strategic location, outstanding customer service and modern technology systems.

• **Distribution strategy**

The distribution strategy is aimed at supplying products to company chain stores so as to make the product accessible to the customer. Product distribution may be a vertical marketing system, supplying global branches with centrally located management points. For example, distribution of products by using quick and easily accessed restaurants by customers.

• **Pricing strategy**

Price can be used to position the product in the eyes of the customer. The price emphasis will be on value and the uniqueness of the prices. For example, Hilton Hotel is highly priced and positioned as the high-class accommodation.

• **Promotion strategy**

The promotion strategy may be to position the company products against the competitor by means of promotional elements. For example, company A's strategy may use all promotional aspects, personal selling, advertising, publicity, and sales promotion to position its products in the market.

- **Competitive advantage**

The strategy may be to combine the uniqueness and value for service that is value based priced to customers. The product uniqueness and ability to satisfy the needs and wants of the customers offers a competitive advantage to a company against the competitor.

Step 4: Determining position feasibility

According to Cravens, (1997:212), positioning analysis is about identifying the competitors involved in a target market, how the market perceives, evaluates and positions them and what are the needs and wants of consumers. Several methods can be used to determine positioning:

Method 1: Customer and competitor research

The organisation may choose to use mathematical methods to analyse competitor and customer research results. The outcome of the research will then give the organisation a clear picture of its position against the competitors (compare George, 2008:161).

Method 2: Test marketing

Market testing is used to gather information about new product performances, as well as new positioning strategies for new products. The product managers may take decisions to test the product to find out the risk associated with investing in these markets. Secondly, to know how fast the new product will be accepted and the difference between marketing risks and cost versus the scale of the product launch (Guiltinan and Gordon, 1997:209).

Method 3: Positioning models

The positioning map may also be used as indicated in Figure 3.15 to position the organisation against the competitors.

Figure 3.15: Positioning Company A against its competitors on the positioning map

Good representation
10
9
C   8   C
B   A 7   A + B
6
5
4
3
Sufficient funding   2   Effective Marketing   Strategy
10 9 8 7   6 5 4 3 2 1   2 3 4 5 6 7 8   9 10
2
3
4
A   5   A
6
7
C   B   8   B + C
9
10
Research & structured Information
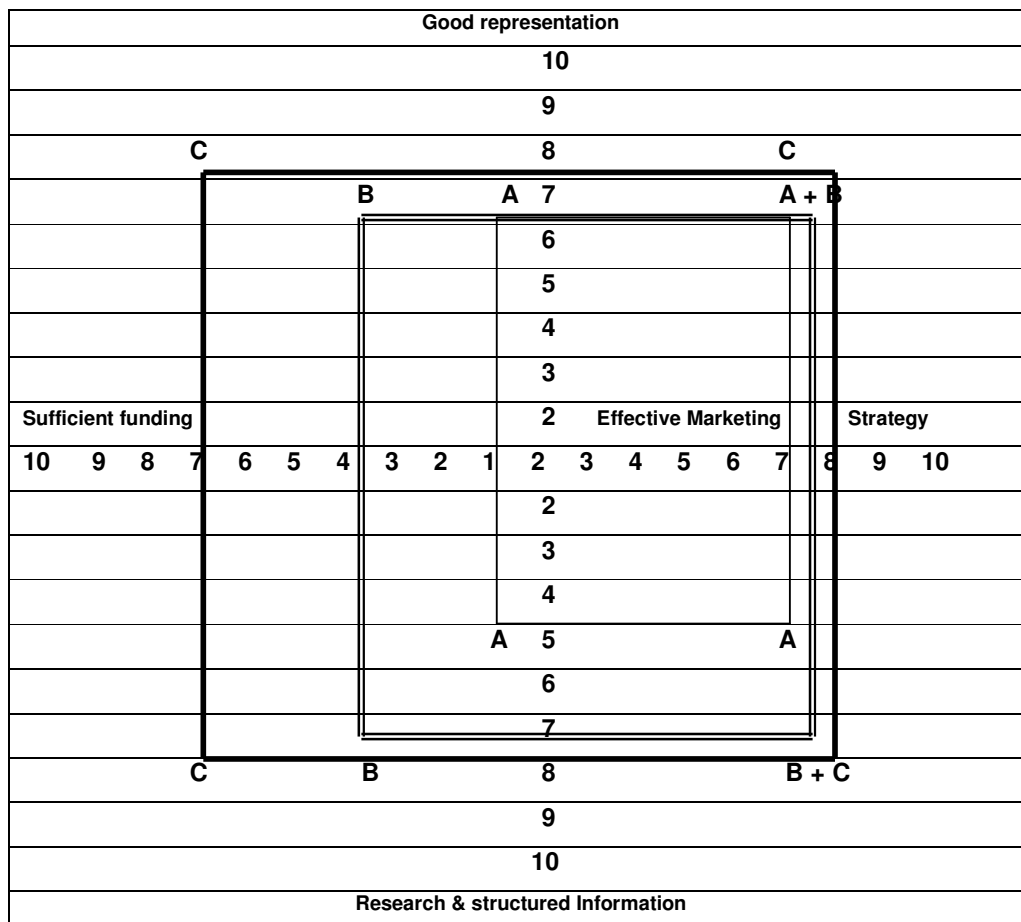
Adapted from: Kotler, et. al. (2003:292)

Figure 3.15 shows how company A is positioned against company B and company C. There are four factors that are positioned on the map, namely: good representation, sufficient funding, effective marketing strategy, research and structured information. The factors are positioned on the map in accordance with their order of importance.

The centre of the map is 0 followed by 1 up to 10 towards the corner of the map. Company A is therefore scored in terms of the value of its critical success factor against the competitors B and C towards the corner (10).

According to the positioning map on effective marketing, company A(8) is positioned at the same level with competitor B(8), competitor C(7) is positioned less than companies A(8) and B(8). The challenge will be for company C(7) to strategically improve its marketing and move towards the corner(10). In terms of sufficient funding on the positioning map competitor C(7) is positioned better than company A(1) and competitor B(4). Therefore, company A should develop strategies to improve its finances and build up towards the corner (10) to gain competitive edge against competitors B and C.

To position company A on the positioning map, company A should first score its critical success factors. The score should be between one and ten, followed by competitor B factors and then draw a line towards the centre of A and B. This will reveal the position of each competitor (compare Reed, 1997:258-261).

According to Kotler, et. al. (2003:288-289), the companies should guard against three major positioning mistakes. The first is under-positioning. In this instance, customers have a very little and limited perception of the company or are unaware of any distinguishing features. The second error is over-positioning or a narrow picture of the company. The third positioning mistake is confused positioning where buyers cannot clearly understand the company image.

3.10 CONCLUSION

This chapter has dealt with strategic planning issues. Theoretical information based on the elements of strategic planning was discussed from different sources. The elements of strategic planning that were discussed in the chapter are the critical success factors, SWOT analysis, competitor analyses; mission statement; goals and objectives; market segmentation and competitive positioning. The next chapter will focus on strategic marketing planning issues.

CHAPTER 4

MARKETING PLANNING ISSUES

4.1 INTRODUCTION

Once comprehensive strategic planning has been performed by an organisation, as discussed in Chapter 3, attention can be focused on the marketing mix. This chapter will therefore address the elements of the marketing mix as part of a marketing planning process.

The marketing mix consists of the following aspects:

- product mix;
- price;
- distribution; and
- promotion mix, consisting of advertising, personal selling, publicity and sales promotion.

The following discussion deals with these aspects.

4.2 PRODUCT

The tourism product can be defined as, "an amalgam of many components, the attractions of the destination, the facilities at the destination and the accessibility of it" (Bennet, 2000:7). This shows that the tourism product is not just a hotel, airline or sunny beach; rather it is the combination of different components constituting a comprehensive product. In addition to this, tourists view the product experience as a price-based experience, and from this, it follows that the price and product image are the basic components of the tourist product.

Tourists choose a destination based on the following considerations:

- appeal of facilities and attractions;
- accessibility by any mode of transport they prefer;
- affordability; and
- The image that corresponds with their preferences and needs (Bennet, et. al 2005:6).

The components of the tourism product include facilities, attractions, image, accessibility and service. Figure 4.1 illustrates the components of the tourism product:

Figure 4.1 Components of the tourism product
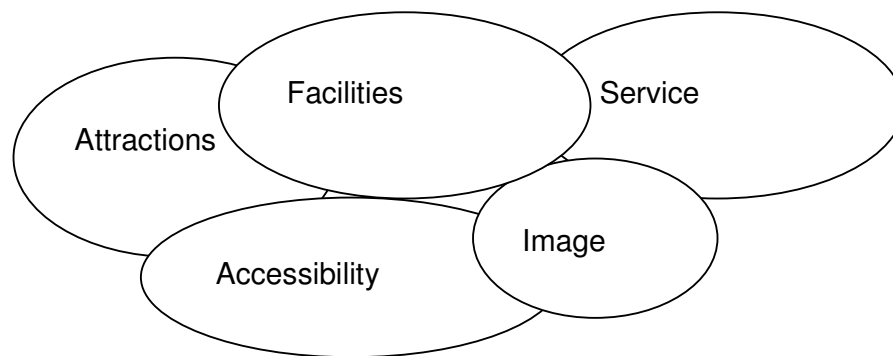
Adapted from: Bennet, (2000:7)

Each of the above-mentioned components will be discussed below in more detail.

4.2.1 Image as a component of the tourism product

Image exposes quality and uniqueness (Johnson, 2000:106) and the perception of image forms an important part of an attraction. For example in South Africa, the Lost City at Sun City has a good tourist image due to excellent public relations and millions of rands invested to create the image.

Du Plessis, (1994:80-81) further elaborates that perception has three attributes:

• previous experience of the product;
• family and friends' word-of-mouth recommendations; and
• immediate prospective tourist needs.

The expectations of tourists regarding the product or destination are shaped and determined by their previous visual and verbal messages concerning the need of planning a holiday at the particular destination. A tourism marketer must therefore work hard to create images that will attract tourists to the destination.

4.2.2 Accessibility as a component of the tourism product

Accessibility is one of the most important elements of the tourism product, and involves the convenience, speed and cost at which the tourist product is reached.

Pizam and Mansfeld, (1999:41-42) suggest that the following aspects are of the utmost importance for accessibility of the tourism product:

• infrastructure such as roads, railways and seaports. The tourist area needs good infrastructure to enhance access to the destinations;
• equipment such as public vehicles, and also their size, speed and range. Tourists visiting rural areas, for example, will need transport to enable them to access such areas;
• operational factors such as pricing service frequency and routes serviced. International tourists will require packaged prices as they regard these as economical. Tourists expect services that satisfy their needs and wants in the destination.

Tourists also often require tours that provide them with enough exposure at various attractions when travelling around the destination; and

• regulations by the government and prosecutions relating to transport operations. Government regulations should also be adhered to, since they may have a serious impact on the proper facilitation of services, for example the issue of fitness certificates for public transportation.

4.2.3 Tourist attractions and facilities

Tourist attractions are central to tourism because without these, there would be no motivation to visit the product. Without attractions, tourism will not exist and there will be little need for hotels, transport, facilities and promotional strategies.

According to George, (2001:290) "[a] destination is a place, including a physical or perceived location, consisting of primary and secondary attractions and supporting amenities that entice people to visit. Basically, it is where offerings designed to meet tourist needs are located."

There are three types of tourist attractions namely: natural attractions, man-made attractions and socio-cultural attractions (Godfrey and Clark, 2000:64-70).

4.2.3.1 Natural attractions

Natural attractions originate from the physical environment. The nature of natural attractions is determined by the following aspects: landscapes, animals, plants, beaches, geographical features and water.

Examples of natural attractions in Southern Africa are:

• the Kruger National Park;
• Clifton Beach;

- the Victoria Falls in Zimbabwe;
- the Okavango Swamps in Botswana; and
- The Namib Desert in Namibia.

According to Godfrey and Clark, (2000:66) the natural attractions of holiday destinations and landscapes are the core focus of the tourists' needs and furthermore are the most important tourist motivation. Tourists can never be attracted to a destination unless it offers abundant sightseeing possibilities and other tourist attractions (compare Briedenhann and Wickens, 2003:73).

4.2.3.2 Man-made attractions

These are tourist attractions designed by man. Examples of such attractions are the following (Middleton and Clarke, 2001:11):

- modern and ancient architectural structures;
- monuments;
- parks and gardens;
- managed tourist attractions such as zoos;
- casinos;
- speciality shops; and
- sports events.

4.2.3.3 Socio-cultural attractions

According to Pizam and Mansfeld, (1999:396), socio-cultural attractions are camping, culture, history, art, religion, science, politics, economy, administration and the way of life of a particular community. Cultural attractions include:

- museums;
- history;
- folklore;

- language;
- special events;
- traditional dress; and
- traditional crafts.

Tourism products should be easily identified and recognised as satisfying the needs and wants of the customers and this could be done through the business concept of product branding. One of the approved ways of stimulating interest in the tourism attractions is through branding. Branding tourism products can be explained as follows:

4.2.3.4 Branding

Branding is the use of a name, symbol, term or design or combination of these aspects to identify the product of an organisation and to distinguish it from those of their competitors (Mariotti, 1999:1). Branding consists of a brand name and a trademark. The brand name is a feature that can be verbalised, such as Holiday Inn or South African Airways. A trademark, on the other hand, is a feature that can be recognised but not verbalised, such as a symbol or design for example, the welcoming open arms on the South African Tourism logo (McDonald and Payne, 1992:18).

A brand name differentiates a product offering from other products, and it also adds perceived value, which has implications for the price that can be charged for the product (McDonald and Payne, 1992:18). Kotler, et. al. (2003:313) mentions the advantages of assigning a brand name or symbol to a product and specifically refers to the following aspects:

- the brand name tends to reflect quality benefits to customers;
- branded products help customers to avoid risks regarding products. For example the Nike sign on a product will represent quality as opposed to a product without this symbol;

- the brand distinguishes and identifies the product from those of the competitors; and
- the consumers' feelings about the organisation are influenced by their feelings about the brand therefore, branding is an opportunity for the organisation to enhance its image (see also Bennet, 2000:210).

a) Why branding?

According to Nilson, (1999:4), company or brand success is based on the following:

- the company has to be seen as the best in one or more aspects. If not, there would not be any reason for choosing that company when spending money;
- branding should reflect the company as having a competitive advantage. It is useless to have a good product if the customer does not see it that way;
- the product is identified by the brand. The brand helps one to be seen, talked about and remembered by the public;
- the communication process can be facilitated quickly and effectively by means of branding. A name is followed by a full set of emotions and impressions for example, if one mentions Nelson Mandela in South Africa, people have a set of associated emotions and will picture a specific individual; and
- branding is the process of tapping into the customer's ability to retain impressions and bringing them together with oral or visual expressions.

The term branding has been misused and has created confusion in businesses. It has been used to define graphic or artistic features such as logos and letterheads, whereas the term actually refers to the building of those values reflected by a specific brand. Having strong values attached to a brand will give the brand commercial power and it will remain in the minds of customers for a long time (McDonald and Payne, 1992:137).

b) Brand terminology

Different types of brands exist, and these are discussed as follows:

- **The corporate brand**

  The corporate brand is that brand symbol embracing all the activities of a corporation (Wichmann and Gregory, 1997:7). The corporate brand identifies specific responsibilities that individuals within the company should take. The purpose is to provide general information and reassurance, not to expose a different set of values. For example, the Holiday Inn Group coordinates all staff departments' activities to complement the image that the group wants to portray to the public (Wichmann and Gregory, 1997:7).

- **House brand**

  The house brand can be linked to traditional branding. All products have similar types of brands for example McDonalds. The advantage of such a brand is that it is easy to match the company and the product, since a house brand covers several products, thus making marketing efforts less expensive. The disadvantage is that it can become hidden in the eyes of the customer precisely because it covers many products (Nilson, 1999:87-98).

- **The range-based brand**

  These are also called product group brands. A number of products and services with common values are attached to, or used for the range brand. The disadvantage of this type of branding is that the company may overload products under one umbrella. An example of this is that Sun International may focus more on casinos than on rooms (Nilson, 1999:87-98).

- **Product brand**

  This type of branding refers to one product, and one style of branding. Each product in the category receives its own brand. The advantage of such branding is that a company can be focused, although the disadvantage is that the company's ability to sustain the product in terms of turnover and capital can be very limited. For example, the BMW Company manufactures different classes of a similar brand of a car (Kapferer, 2001:223).

- **Primary brand**

  This is the "benchmark" brand, and is regarded as a leader in the market. The primary brand will have a higher market share and be known among the customers who buy the product without them feeling that they are taking any risks. The Coca-Cola Company uses Coke as the benchmark product (Nilson, 1999:87-98).

- **Secondary brand**

  A secondary brand may be positioned as number two, three or four in the market sector. It is a brand that the customer will choose when nothing else is available, and it is a brand that nonetheless has a good reputation. With their slogan "We are number two, we try harder", Avis Car Rental positioned themselves as number two to the giant Imperial Car Rental (Nilson, 1999:87-98).

- **Tertiary brand**

  The tertiary brand is not common and is, furthermore, not available in all markets. The tertiary brand entails selling at a heavy discount against the market leader's selling price. Tertiary brands are introduced for short periods and originate from factories with low expectations of profit.

The Coca-Cola company, for example, introduced the 450 ml Coke selling at a lower price, which is only available from time to time (Nilson, 1999:87-98).

- **The channel brand**

For each main distribution channel there is a specific brand. Channel brands hide the reality of the product behind the brand. Coca-Cola, for example, produced the Bibo product without its name attached to the product (Nilson, 1999:87-98).

- **The own label**

The own label is also called the private label. The difference between the channel brand and an own label is that the former is controlled by the manufacturers and is sold through several different retailers or distributors, while the latter is controlled by the retailer and produced on a co-packing basis by contracted manufacturers. For example, Jet Stores sells products with the name "Jet" on the label without the manufacturer's name, Edcon being attached (Blackett, 1998:7).

- **The fighting brand**

The fighting brand is sold to the market for not more than 24% – 30% discount. The fighting brand sells on a price platform and has no marketing support. Furthermore, the fighting brand is introduced to serve as protection for the main brand under attack by using low-priced alternatives. The company uses the fighting brand to win sales from the competitor, and when the mission is complete, the fighting brand disappears. For example, the Coca Cola company sold 450ml Coke cans at a low price and after a certain period of time, these where withdrawn from the market (Nilson, 1999:87-98).

Out of the available strategies of branding, the organisation may apply each strategy according to the environment it is faced with. The branded products that are in the market need continuous evaluation in terms of their level of appeal in the market and their profitability to the organisation. Another important product-related issue to consider in strategic marketing is the analysis of the product portfolio through an investigation into the product life-cycle concept or an application of the Boston Consulting Group matrix.

4.2.3.5 Product portfolio analysis

The Boston matrix helps an organisation to identify the performance and management of the offering's appeal and profitability within the market. The idea is to find out whether the product is still attracting customers and thus, whether it is making a profit for the organisation, taking into account the risk involved. The main purpose of the Boston matrix is to maximise the long-term profitability of a business. The functioning of the Boston consultation matrix can be explained in figure 4.2 as follows (Stern and Deimler, 2006:35-39; David, 2005:212-214 and Campbell, 2002:107):

Figure 4.2 The portfolio matrix

		High	Low
Relative Market growth	High	Stars	Question marks
	Low	Cash cows	Dogs
		High	Low
		Relative market share	

Adapted from: Kotler, et. al. (2006:84)

From figure 4.2, the following aspects can be derived:

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a) Question marks

These are the products with a high relative market growth and low relative market share. The company should market question marks in order for them to become stars. For a question mark product, a product re-launching or product redesign may increase sales. The company may embark on vigorous promotion of the product. For example, SAA were losing market share in their flights, so they launched low airfare prices during the low seasons, and the market share was regained.

b) The stars

These are products with high relative market growth and high relative market share, and which generate a high income. Stars are heavy profit makers for their company and their status should be maintained. The disadvantage of stars is that once they are faced with strong competition and rising prices, they may turn into a dog. Advertising and marketing expenditure of stars is high and product development costs have to be paid back, and these issues affect profitability. An example of a star is Cape Town in South Africa attracting tourists from all over the world.

c) Cash cows

These are leaders in a mature market and are products with a low relative market growth and a high relative market share. Cash cows may be used to cover debts, research and developments, pay dividends and subsidise other products. They are like the backbone of the company in that they finance other products such as stars, question marks and dogs within the company. Before withdrawing cash cow products from the market, the company should obtain the maximum financial advantage from them (compare Strydom, 1992:135).

d) Dogs

Dogs are products with a weak relative market share and a low market growth. Since they do not generate income, they require a great deal of money to keep them running. The company may do away with them, sell them or develop and reintroduce them as question marks. Dogs can still be profitable, however, as some companies do generate money from them, but they are not seen advertised on television.

Jain, (2000:256) indicates that: "[t]he portfolio matrix approach, however, is not a panacea for strategy development. There can be many difficulties and mistakes that can hamper the workability of the portfolio matrix." Such mistakes are the following:

- low growth segments caused by a lack of proper analysis and objectivity. The organisation should identify the needs, wants and demands of customers before they develop a product. When customer needs are satisfied, the product is likely to have a high market growth. The segment growth rate could be misjudged due to poor market research. The organisation should conduct market research in order to identify whether there is a potential market for the product;

- a fluctuating business mix may result due to a lack of financial resources and planning. The organisation should not over-plan and should ensure that their plan matches the resources and capital that they have;

- cost-effectiveness loss due to a lack of control systems and operational systems may result. The portfolio matrix needs an efficient control system. Top management may appoint an executive to take charge of the product portfolio to minimise the possibilities of lack of control; and

- market share losses may occur due to poor promotion, sales capabilities and an improper market strategy.

The organisation needs to launch a vigorous promotion of the product more especially at the question mark stage, in order to get the attention of the market.

According to Tomlison, et. al. (2001:53) and Aaker (1998:132-133), the following are among the strategies that the organisation may apply in the Boston matrix:

- invest to hold. The organisation invests enough capital to stop the product from performing poorly against environmental and competitive forces;

- invest to penetrate. The organisation may invest capital in the product with the aim of pushing the position of the product up;

- invest to rebuild. The organisation invests capital in a product with the aim of regaining a lost position;

- selective investment. The organisation strengthens the product position in some segments of the market and neglects other segments;

- low investment. The organisation harvests the business by drawing cash out and cutting the investments; and

- divestiture. The organisation may decide to sell or liquidate a product that is not profitable.

The advantages of a portfolio matrix are as follows (Cambridge Training and Development Manual, 2000:1):

- to motivate top management to evaluate the performance of each product in the market individually based on the company's goals and objectives. The organisation can develop strategies for the stars, cash cows, dogs and question mark products;

- help management to evaluate the potential of a certain product in the company. Their judgment will be backed by externally based practical information;

- the portfolio matrix helps management to plan the cash flow in a manner that will result in organisational growth and expansion; and

- for strategic moves, managers must analyse competitors and predict competitive responses in order to maintain a competitive edge.

The disadvantages of the Boston matrix are the following (Campbell, et. al. 2002:110; David, 2005 213; George, 2004:64 and Kotler, et. al. 2003:87):

- the Boston matrix does not reveal the market share, but singles out the company performance against the competitor;

- the Boston matrix ignores market dynamics. It is important that the dynamics of the market are taken into consideration because some markets such as national parks change slowly, and other markets change rapidly, for example restaurants;

- the Boston matrix has fairly limited usefulness in the service industry because there are many competitors such as multinational hotel companies, unlike in the case of the manufacturing industry where there are limited competitors (for example, household detergents);

- the Boston matrix does not consider the interrelationships between offerings. The consideration of interrelationships between the offerings assists organisations to formulate strategies much better as this will clearly distinguish between complementary and supportive offerings (such as a hotel's swimming pool); and

- the Boston matrix compels the organisation to gather information on a particular competitor, offering similar products in the market.

Therefore, it is imperative that factors such as profitability, market growth and company resources should be carefully considered when formulating the Boston matrix. These are the core factors that determine the success of the product within the market circle (compare Tomlinson, et. al. 2001:51-52).

- One of the core factors that are important with regard to the success of the product in the market circle is the packaging of tourism products. The organisation needs to provide services that satisfy and meet customer needs, wants, demand and expectations. The manner in which tourism services are packaged may be crucial for optimal tourist satisfaction.

4.2.3.6 Packaging in tourism

- According to Pizam and Mansfeld, (1999:186-187), package tours, or package holidays, are all-inclusive tours, often with flight transportation, all with limited flexibility, and with the same purpose. For example, such packages have a number of common characteristics such as being effective, safe, and less expensive in comparison to buying flight and hotel accommodation separately.

- The tourist on a package tour will be able to visit a large number of sites in a short period of time, needing neither time nor skill to arrange the tour personally, and is able to take advantage of the tour organisers' lower prices, through their clever economic negotiations.

Enoch, (1996:601) remarks that tourists can use the package: "[t]o travel to faraway countries with strange cultures, unreliable transportation, and doubtful standards of hygiene."

The World Tourism Organisation (WTO) recommendation states that: "[t]he tour type can either be package or non-package. The package refers to the purchase of travel services including transport and accommodation. All other trips are non-package tours."

According to Bloomquist and Sem, (1994:1), the following factors constitute the advantages of packaging to customers:

- the ability to budget for trips. Packages make it possible for the customer to pay for everything included in a tour;
- increased convenience. Packages allow the customer to make the reservation and payment for a tour with one telephone call;
- greater economy. Businesses that present package tours can always buy at wholesale prices and the customers can get products at the best prices;
- popular programmes and activities. Tourists are sometimes unfamiliar with attractions, and a package will make it easier for them to access these; and
- specialised interests. Packages can also include components not readily available to customers for example, a lecture by a well-known author.

The advantages of packaging to businesses include the following (Bloomquist and Sem, 1994:1):

- improved profitability. Customers may be required to stay for a prescribed period or to purchase a combination of goods and services;
- smooth business patterns. Packaging can be used during low seasons to add attractive services to the product, thus generating profit;
- joint marketing opportunities. Packaging by joining businesses can reduce the costs of marketing or promotion;
- improved target market. Packaging can allow for the tailoring of tourism products for different target markets;

- greater holiday weekend business. Packaging can be used to highlight the holidays and to develop services that will be relevant for the holiday time;
- unique recurring weekends. Businesses can develop an event that could take place every weekend for the rest of the year; and
- redirecting traffic to lesser-known attractions. Packages allow less visited attractions to be discovered by tourists and provide relief to heavily visited attractions.

Managers should consider the following aspects when developing packages (Morrison, 2002:331-333):

- willingness to do market research to determine the needs, wants and demands of the customer;
- establishing the potential attractions, businesses and marketing services available to provide these services;
- tapping into potential marketing and promotional networks that will help spread the word about one's product;
- ensuring that the physical and service skills of the business match the needs of the customers; and
- readiness to take a risk.

Packaging should be transportable, attractive and convenient. Accuracy, comprehensiveness, and convenience of delivery of products should be practised at all times by a business. The quality, quantity and specifications issues should be done according to the company's service specifications. When packaging is done in the tourism business, it is important to consider tourism routes.

4.2.3.7 Tourism routes

According to Briedenhann and Wickens, (2003:72), business in rural areas is secured by clustering activities and attractions, erecting of user-friendly signage, the establishing of easily accessible information offices, developing of tourism routes that stimulate entrepreneurial opportunity, the development of ancillary services and providing a diverse range of optional activities.

A tourism route can be defined as a route crossing one or two or more countries or regions, organised around themes, history, arts and culture for tourism purposes (Theuvsen, 2004:1 and Council of Europe, 2002:2).

According to Titanont and Chantoa, (2004:2-5), a tourism route makes it easy to maintain carrying capacity since a specific number of tourists will be permitted to use a certain product, reduce negative environmental impacts since tourists will be properly regulated and controlled, and also provide for better distribution of economic benefits since tourists are channelled equally to tourists' products.

Furthermore, tourism routes enhance cooperation and partnership between local areas, provinces, and the private sector. For example, in South Africa the Open Africa Foundation was established in 1995 by a group of scientists, business people, tourism experts, sociologists and conservationists. Its vision is "[t]o link the splendours of Africa in a continuous network of Africa-tourism routes, from Cape to Cairo" (Open Africa, 2002:2).

The mission is: "[t]o turn Africa's natural and cultural resources into one of the most valuable products on earth, based on the principle of supply and demand, which dictates that whatever is rare is valuable" (Open Africa, 2002:2).

The development of Afrikatourism, a term used to brand the idea of tourism routes and projects that are purely African, is aimed at overcoming shortcomings in achieving African tourism objectives. The idea is that tourism routes need equal involvement of the private, national and community sectors.

According to Titanont and Chantoa, (2004:2-5) and Middleton and Hawkins, (1998:39), the success of achieving sustainable travel and tourism is lodged in the competence and authority of local government that is responsible for a specific tourism destination, not excluding the private sector. One of the core factors that are important with regard to the success of the product in the market cycle is service. The organisation needs to provide services that satisfy and meet customer needs, wants, demands and expectations. The manner in which services can be improved to satisfy the customer is discussed below.

4.2.4 Service

The service industries cannot do without quality services if they want to retain customers and make profits in the long run. The service mix includes service gaps, the service chain and strategies to achieve quality services (Pizam and Mansfeld, 2000:270). These are set out below.

4.2.4.1 Service gaps

Figure 4.3 illustrates the different service gaps experienced in the business environment.

Figure 4.3 The servqual model
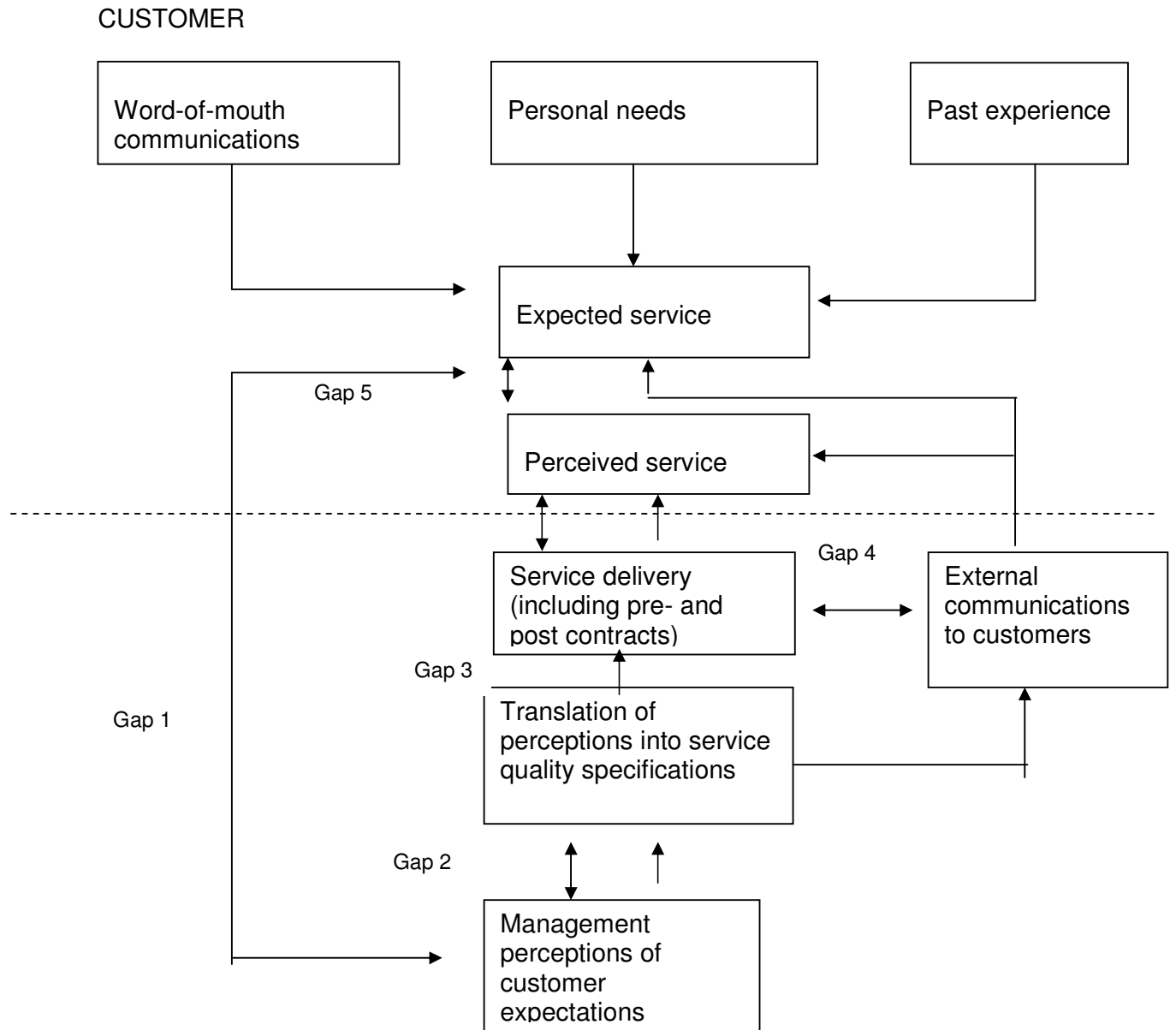
CUSTOMER

Adapted from Zeithaml, et. al. (2009:43).

From figure 4.3, the following gaps may be identified and explained:

Gap 1. The gap between customer expectations and management perceptions of these gaps.

Gap 2. The gap between management's perceptions of customer satisfaction expectations and customer satisfaction expectations.

Gap 3. The gap between service quality specifications and actual service delivery

Gap 4. The gap between actual delivery and external communication about the service gaps

The next discussion will elaborate further upon the causes of these gaps and possible ways of closing such gaps.

a) Gap 1. Not understanding customer expectations

Gap 1 mainly entails management's expectations of customers' needs, wants and demands of services.

According to Nicolaides, (2003:6) services must be offered to suit customers' needs and their willingness to pay for it. An organisation that does not have knowledge of customers' needs cannot supply them satisfactorily, therefore enlarging Gap 1. Possible causes of gap 1 are:

- management needs to have open communication with lower management, because a lack of upward communication contributes to Gap 1; and
- too many management levels are not advantageous for a company as they are likely to block the flow of communication between the customer and employees who are responsible for setting up the standard of service delivery.

Zeithaml, et. al. (2009:44-45) suggest the following strategies to close Gap 1:

- customer complaints can be used to respond to customers' needs;
- managers must react positively to customers' complaints and treat them seriously;
- the organisation can learn from other organisations, their previous experiences and how they overcame problems. The organisation can thus learn from an organisation with similar experiences;
- the organisation should keep contact with its customers. The advantage of such contact is that it helps to create opportunities for understanding complications and expectations of customers;
- key client studies should be conducted with loyal customers in order to gather information about them;
- customer panels can be created by means of inviting customers to freely talk about the service and their expectations;
- immediately after the service has been offered, customer satisfaction should be evaluated by using guest satisfaction questionnaires;
- customer expectations should be evaluated through regular assessment;
- marketing research should be used effectively. Research results should guide management actions;
- interaction between customers and management should be maximised, since frontline staff have high levels of contact with customers and also solve their problems. Supervisors must have contact with customers to offer new ideas; and
- upward communication should be encouraged and facilitated, so that managers can provide employees with solutions to problems that customers are likely to encounter.

Managerial levels should be kept to the minimum. This will help the organisation to deal with changes in the business environment.

b) Gap 2. The gap between management perceptions of customer expectations and customer expectations

Gap 2 is mainly the result of ignorance from the side of the management regarding the expectations of the customer. Management thus relies on what they think the customer's expectations are, and deliver services based on that (Nicolaides, 2003:9).

The causes of Gap 2 are explained as:

- inadequate commitment by top management. Unless management is committed to service, quality will not be achieved and therefore, management should come up with objectives and goals that should be acted upon;
- unfeasibility perception strikes an organisation when it believes it cannot meet customer expectations due to a lack of resources, capital and facilities;
- inadequate tasks standardisation results from managers who believe that their services are routine and therefore cannot be standardised; and
- the absence of service goals setting in the organisation results in inadequate service goals that are supposed to be in line with customer's needs and would be neglected, and the organisation will be doing what is pleasing, therefore losing the customer (Nicolaides, 2003:11).

Zeithaml, et. al. (2009:44-45) suggest the following solutions to close Gap 2:

- hard technology can be used to replace human effort, and soft technology such as the Galileo reservation system and a human touch can be added together, with the aim of standardising tasks within the organisation; and
- nothing should stand in the organisation's way when it comes to satisfying customer needs. The organisation should have a positive vision. Furthermore, the organisation should develop a mentality of attainability through possibility in that whatever little resources the organisation has should be used to the maximum to obtain the best results.

c) Gap 3. The gap between service quality and service delivery

This is the gap that occurs when the customer has arrived at the business. According to Bennet, (2000:239) and Nicolaides, (2003:10), possible reasons for Gap 3 are:

- employees who lose control over their jobs will be left with stress and a feeling of helplessness, resulting in poor performance;
- complex rules and procedures and unpredictable demands by the manager to employees lead to a lack of employee control.
  Pressure at work should be reduced to a manageable level to avoid a lack of employee control over the job;
- teamwork within the organisation is part of service quality. Management should stress that a lack of teamwork results in poor quality service delivery;
- unskilled employees result in poor service delivery, culminating in a poor image of the company. Therefore, management must refrain from below the standard employee's job fit;
- employees need proper technological equipment and skills to produce expected results. This dream cannot become a reality whilst the organisation practises below the standard technology job fit;
- it may be that managers only evaluate employees based on the outcome of how many customers are served per day and thus overlook customers' perception of quality. This is an inappropriate supervisory control system;
- employees may be expected to satisfy opposing demands. For example, the employee may handle reservations and simultaneously pay attention to customers to avoid offending customers by keeping them waiting in a queue for a long time. This results in role conflict and managers should avoid this when aiming for proper service delivery; and
- it should be emphasised that the employee cannot deliver the expected services standards and meet the customer expectations in the organisation without proper training and knowledge of the job.

Zeithaml, et. al. (2009:44-45) and Bennet, (2000:240) recommend the following solutions to close Gap 3:

- goals, strategies, objectives and philosophies of the organisation should be communicated to the employer, and interpersonal and technical training should be offered to the employee. Managers' and customers' expectations, perceptions and problems should be negotiated. Clarity with regard to quality standards and job descriptions should be provided;
- customers require the best services to satisfy their needs, wants and demands. Customer expectations should define service standards;
- employees must be involved in service decision making, since they have direct contact with customers;
- during the screening process and selection process, customer contact abilities should be considered and the applicant who does not have such qualities should not be employed;
- employees' technological job fit should be improved;
- the organisation should offer rewards to employees for excellent job performance and such rewards should be simple, accurate and fair;
- employees should be given adequate and deserving freedom to assume responsibility in their jobs. Employee-customer contact should be stressed in the company; and
- team spirit should be encouraged and implemented within the organisation.

d) Gap 4. The gap between service delivery and external communication

Gap 4 is concerned with what the customer experiences in the company. The transaction period will determine whether the customer will return to the tourist product as well as the word of mouth messages that will be spread about services offered by the visited organisation.

According to Bennet, (2000:243), the possible causes of Gap 4 may be the following:

- insufficient horizontal communication within the organisation results in a conflict between different levels of management. There must be mutual communication in place to avoid such conflict;
- companies with conflicting or contradicting policies and procedures may become victims of conflicts among their branches and franchises; and
- advertising and selling are sometimes overexposed in order to attract shares and profits in the company. Customers are not likely to return to a place where they were misled in terms of services. It is not good to over-promise customers.

Zeithaml, et. al. (2009:44-45) propose the following ways to overcome Gap 4:

- the company should encourage advertising and operations to have effective communication and this will result in an accurate and true promotion;
- employees should be informed about the advertising campaign so that they can adjust to what is expected of them;
- the sales department and operation office should have mutually effective communication so that promises made to the public are delivered to the customers. Quarterly or monthly meetings should be held to report on matters of common concern and successes between departments;
- the three main departments should act like triplets in a mutual relationship and should pursue proper communication. Human resources, marketing, and operations departments should have an appointed coordinator within the company to facilitate free and fair mutual communication. This will result in proper services being delivered by the organisation;
- the organisation should provide consistent services among, or across, the branches.

All stakeholders should follow the same procedures and policies; and

- a manual containing the code of conduct of the organisation can be distributed amongst all the members of the organisation. However, an exception should be made where an organisation deviates for quality service purposes.

Characteristics of service that are most important to customers should be the focus of advertising efforts to the target market, and the aim should be to reduce over-promising in promotional campaigns.

e) Gap 5: The gap between the quality a customer perceives in a service and his/her expectations

Gap 5 incorporates all the causes of Gaps 1, 2, 3 and 4: when all these gaps are closed, then Gap 5 will automatically be closed and service quality will be achieved. Service quality requires the involvement of both staff and management. The service chain can be used to provide direction on how to coordinate different levels of management in offering quality services with the goal of retaining customers.

4.2.4.2 The service chain

The service chain attempts to acknowledge the staff of an organisation. The idea is to satisfy the staff, because, when staff members are satisfied, they will deliver a standard of service that will satisfy the customer. This will result in customer retention and loyalty. The service chain identifies those elements affecting customer satisfaction. It also identifies the road travelled by the components of a company's service, from conception to end-use. It is imperative for the company to keep its staff highly motivated since they are the ones who have high levels of immediate contact with customers. Employees are the ones who solve the problems of the customers. Well-motivated frontline employees will present a positive image to customers during the first impression.

The following aspects could be attended to in order to motivate the staff (Messmer, 2001:161-171):

- during the induction process, a suitable candidate for the job should be selected. If the candidate does not qualify, the company should not place him/her;
- employees working overtime should receive extra remuneration as incentive;
- by the end of each financial year, the employee should have an opportunity to accumulate minimal shares in the company's profits in the form of employee profit sharing schemes;
- there must be awards for the best employee of the year;
- long-service employees should be promoted to higher positions; and
- if the employee has reached targets before the deadline, the company may reward him/her with a day off.

There should be a feeling of growth amongst the employees, and therefore training should be put into place for those employees wishing to expand their knowledge. The service chain is explained in figure 4.4.

Figure 4.4 Service chain

SUPPLIERS

CORPORATE VALUES

CUSTOMER

COMPANY EMPLOYEE RETENTION

PRODUCT/SERVICE

PRE-SALE ENVIRONMENT

INTERMEDIARIES

SALES PR

AFTER-SALES SERVICES

ATTITUDES CUSTOMER RETENTION

Adapted from   Blem (1995:25).
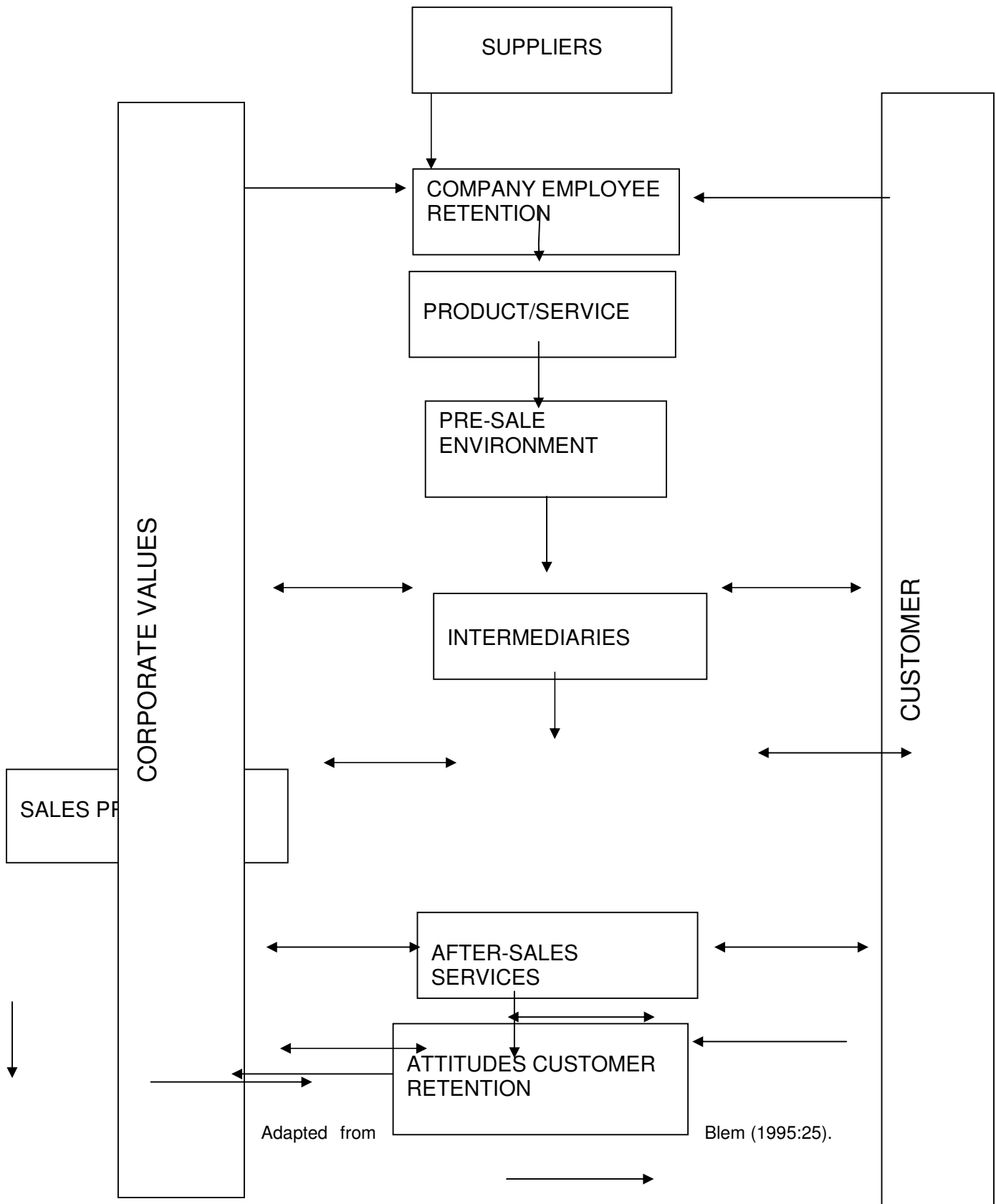
The service chain begins with the customer. The aim is to identify and satisfy the needs and wants of the customer by means of products or services. At the company's pre-sale offering, the customer becomes aware of the company's offering. The customer may see an advertisement or hear about the services from a friend. The customer will then be motivated to start wanting to use the company's services. The customer then uses an intermediary if the company is using one (Morrison, 2002:288).

After-sales service should be considered very important. The customer should be considered as important as when the company concludes sales. The attitude of the staff is very important in sales either being positive, negative or neutral; the customer will also react either positively or negatively, depending on the staff's attitude. The supplier reflects on service in terms of the quality of services delivered. The product also has an effect on the customer. The customer finds it hard to use services when the product appearance is poorly designed. Therefore, good services cannot depend on poorly designed products in the long term (Naumann, 1995:108-109).

The manner in which the product is designed reflects service standards to the customer. When the product is designed badly this will limit the customer's interest in the product. Well-trained staff, complemented by good service will result in improved sales in the company (Blem, 1995:26). The organisation should train the staff to capitalise on the following three types of services.

4.2.4.3 Types of services

The service industry is characterised by three types of services, namely pre-sale services, transaction services and post sale services (Kasper, et. al. 2006:319-322; Kolb, 2006:131-133; Hoffman, 1999:25-24 and Naumann, 1995:81-84):

a) The pre-sale environment

The customer is surrounded by the pre-sale environment before he or she orders or experiences the product. Expectations of customers are created from this stage, since he or she may be confused if they have not yet analysed their holiday needs. The customer may require more information, and if his or her expectation is higher than what the product offers, there is, unfortunately nothing that the company can do to convince the customer to buy the product.

According to Kay, (2003:15), publicity, advertising and sales promotion play a major role either to change the customer's attitude, demote or reinforce it. The company should offer telephone numbers or a website address so that the customer can contact the company for further information.

b) Transaction services

The transaction phase involves the direct exchange transaction between the customers and the company. For an organisation to perform at its best in the transaction phase, it needs well-motivated staff that will, in turn, result in customer satisfaction. If the management of the organisation satisfies the employees, the employees will in turn deliver best services to the customer. The satisfied customers are likely to be loyal to the organisation.

c) After-sale service

The organisation should send out a document that informs customers about specials. Customers may have complaints about services offered by the organisation. For example, questionnaires must be distributed to customers to test their satisfaction with the service experience afterwards.

Once the company product strategy is in place, the development of a price strategy follows.

4.3 PRICE

According to Hanna and Dodge, (1995:1), the effective way for a company to generate maximum profits is to get its pricing right. This will boost profit in the organisation and wrong price can minimise profits.

Many Managers should realise that profits are generated at the transaction level, the point where the product meets the consumer, (see also Jain, 2000:444, Bennet, 2000:130 and Heath and Wall, 1992:140).

The consumer should be regarded as a central factor in the process of setting prices. In the tourism industry, setting prices could be a complicated task, because tourists buy the total product, including hotels and restaurants jointly, which are all part of a packaged price. It is important to know the entire product. Strydom, (1992:170) suggests, "[p]rice fixing meaning the determination of a price by a company must recognise facets such as the quality of tourist's offerings, peak seasons and competitors". According to Jain, (2000:410) there are typical pricing problems that include:

- product line price imbalances. Different companies offer the same product at different prices, making it difficult for a business to decide upon a proper price;
- competitors' prices are higher or lower than those of the challenger. When the competitor's prices are higher, customers may choose to go to the challenger where prices are lower;
- middlemen exert excessive pressure to generate sales. This will cause a loss if the prices have to be lowered to sell the product in large numbers since the business may run at a loss;

- sales decline. Declining sales make it difficult to determine a proper price for the product since the organisation has to allocate more money to strategies for improving sales percentages;

- an effect by environmental realities due to frequent price changes. Changing prices frequently makes it difficult to determine a stable price that will suit customer expectations; and

- the customer's perceptions of price offering vis-à-vis distortion. If the price does not meet the customer's willingness to pay, he/she will be discouraged from buying the product (Lambin, 2000:518).

Price objectives need to be formulated before pricing strategies are formulated, since objectives provide guidelines for setting strategies.

4.3.1 Formulation of price objectives

According to Jain, (2000:410) and Lambin, (2000:518-519), the following aspects are potential pricing objectives:

- profit-orientated, desired net profit percentage;
- volume-orientated, percentage of market share desired to be achieved;
- growth;
- market stability;
- maximum long-run profits;
- maximum short-run profits;
- customer price should be based on expectations, needs and wants;
- maintaining price leadership arrangements;
- discouraging new entrants;
- building a price traffic flow in the business environment;
- making one's product visible;
- being alert to discourage others from cutting prices;
- rivals should consider one to be trustworthy and reliable;
- building excitement and interest;
- not allowing suppliers to over-demand from the organisation;

- to be seen as offering fair prices by customers;
- getting the sales support and loyalty of a middleman;
- avoiding control and sort investigations;
- speedy exit for perishable products in the manufacturing industries;
- keeping price leadership arrangement items; and
- lending a hand in the sale of weak items in the line.

The above factors suggest that a company may choose from various pricing objectives. These pricing objectives help the company to set a high price to allow it to make profit, set a low price to discourage competitors from gaining competitive edge, and set a lower price than the competitor in order to gain profits.

4.3.2 Pricing strategy for new products

According to Lambin, (2000:541-543), experts suggest various pricing strategies that the organisation may implement, and these are discussed as follows:

4.3.2.1 Market skimming strategy

Market skimming occurs when the organisation targets a small market with a relative high-priced product. High demand for a product in most markets results in market skimming. The high demand leaves customers insensitive to prices since there is no choice but to obtain the product from the service deliverer (Johnson, 2000:204). Sometimes prices can be kept high to reflect a superior image of the product. With urban tourism, the skimming strategy will be applicable in circumstances where the following occurs (Kotler, et. al. 2003:469 and Lambin, 2000:541-543):

- there are tourists with relatively inclusive demands. When tourists have an inclusive demand for the product, the product will be at a risk of being overused. A skimming strategy will ensure control over high demand of the product to avoid over-carrying capacity and depletion of the product;

- competition occurs where a price strategy is based on an imitation of the prices set by the competitors. This will allow the organisation to be positioned at the same standard as the competitor;

- the status quo could be maintained where no alternative strategy is considered and the current strategy is regarded as satisfactory. The skimming strategy may also be used as a survival mechanism of the organisation;

- a skimming pricing strategy may be strongly recommended when there are reasons to believe that the new product's life cycle will be short, and when the competition is expected to copy and market a similar product in the near future, because a low pricing strategy will make competitor innovation unprofitable;

- at the time a product may be so innovative that the market is expected to mature slowly and the buyer has no basis for comparing it to other products, thus demand is inelastic. The firm may price products highly at this point and then readjust these progressively as the market matures;

- a new product can be introduced into the market at a high price to reach a specific market segment. Thus, market entry price skims those customers who are insensitive to price. A later price cut allows the firm to reach successively more elastic segments. This is similar to discriminatory pricing where prices are adjusted to suit different consumers. When the manufacturing process is not yet stabilised, costs are likely to be underestimated because demand is hard to evaluate. It is risky to anticipate the kind of demand, growth or cost reduction that can result from a low price (Morrison, 2002:533); and

- when the firm does not have the financial means necessary for a successful product introduction, charging high prices is one way of generating such resources. To be effective, the introduction of a new product requires heavy expenditures on advertising and promotion.

A skimming strategy is not commercial but rather financial in nature. Its main advantage is that it makes price adjustments possible depending on the market and competition developments. Commercially, it is easier to cut a price than to increase it. The strategy's importance is lodged in its ability to generate finances that can be utilised for alternative activities (Holden and Nagel, 2002:166).

4.3.2.2 Market penetration strategy

According to Lumsdon, (1997:2002), a penetration strategy is common when the market is sensitive to price and the competitor is challenged by lower prices. The market penetration strategy offers lower prices on products similar to those of the competitor in order to gain a share of the competitor's markets. Customer demand must be elastic over the entire demand curve, as there are no upper segments to be allocated priority and the only strategy is to serve the entire market at a price low enough to satisfy the largest number of customers.

It is possible to achieve lower prices by increasing products in the market significantly because of economies of scale. The new product is likely to be threatened by the competition at its launch. The penetration strategy is used here to discourage competitors from entering the market. Low prices act as very efficient barriers to entry because the organisation is at risk of losing profits. The market penetration policy is the only valid policy to develop the market when the top range of the market is already satisfied (Holden and Nagel, 2002:117).

4.3.3 Price strategies for existing products

The following discussion is based on price strategies for existing product.

4.3.3.1 Maintenance of the price

If a market segment, which is responsible for a significant portion of a region's product sales, is not affected by a change in the environment, existing prices can be maintained. Such a strategy is appropriate where a price strategy is difficult to determine because the reaction of customers and competitors to price change cannot be predicted (Kotler, et. al. 2003:470).

4.3.3.2 Price increase

According to Cravens, (1994:476), increase in prices can be conducted as follows:

- during periods of high inflation, high prices may be useful to keep profitability. Price may be increased and reduced after inflation to equalise price levels; and
- to imitate competitors, a company may decide to increase price. The long-term impact of prices must be considered before price increases. It may increase profits, and the product demand may be reduced by price changes (see also Holden and Nagel, 2002:17).

4.3.3.3 Price reduction

There are three reasons for deciding to lower prices:

- it can occur as a strategy for defence against competitors;

- price lowering can take place based on aspects such as extended experience and technological progress; and
- price lowering can be a reaction to clients needs. If low prices are a prerequisite for market growth, clients' needs must be seen as a pivotal point in the marketing strategy (see also Holden and Nagel, 2002:17).

The company should take into account the following considerations if a price reduction strategy is decided upon:

- price reduction may have a long-term impact, such as the perception of inferior products in comparison with competitors' products; and
- a superior and exclusively positioned image can be damaged in the process.

If price lowering destroys the enterprise's financial position, the strategy must be avoided even if it may be the best option under the circumstances (Kotler, et. al. 2003:474; Holden and Nagel, 2002:178).

4.3.3.4 Price flexibility strategy

According to Jain, (2000:428) a price flexibility strategy means that a product with similar features may be offered to different markets at different prices. For example, SAA offers different classes with various price fares on the same airline.

4.3.3.5 Single price strategy

A single price strategy occurs when a product is priced to accommodate a specific market segment. According to Strydom, (1992:178) a single strategy may be applied in the following circumstances:

- students or aged markets can receive special prices;
- a group of people utilising a tourism product may be granted a price reduction; and
- regular tourism product users may receive price reductions.

4.3.3.6 Product line price strategy

A company can price competitive products in its product line differently, when products:

- contribute more towards the company's profitability;
- do not cover the company's pro rata share but contribute more than differential cost; and
- the organisation's shares cannot be changed, but elimination of shares is the company's only refuge (Holden and Nagel, 2002:166).

4.3.3.7 Price leadership strategy

According to Jain, (2000:435), price leadership is applied when one organisation emerges as the leader and indicates the price. The rest of the industry then adopts the leader's price. Price leaders have a large market share and display the following characteristics:

- price leaders often use modern technological innovation for product development and as a result, this affects the manner in which pricing decisions will be made;
- price leaders have a strong distribution system;
- price leaders are normally characterised by good client relations;
- price leaders have an effective market information system;
- price leaders are sensitive to price changes in the industry at large;
- price leaders are considered to be experts in price changes;
- price leaders have effective product lines and good financial records;

- price leaders have commitment to a specific quality product; and
- price leaders are equipped with the necessary legal knowledge of the corporate world (also see Holden and Nagel, 2002:166).

4.3.3.8 Bundling pricing strategy

According to Hanna and Dodge, (1995:152), marketers who use this pricing strategy combine several of their products in a package and reduce their prices in this manner. A restaurant may introduce an all-inclusive price for a starter, dessert, meal, and juice, or include a salad bar. The product bundle adds an advantage for the customer who can benefit from a product that he/she might not have bought. No matter how minimal the benefits are regarding the products, the customer might be influenced to buy them. For example, an airline might include on-board services such as refreshments, in-flight movies or magazines in the ticket price.

4.3.3.9 Premium pricing

According to George, (2001:188), tour operators, restaurants and resorts make use of premium pricing to position themselves as upmarket offerings within a certain type of market. The reflection of value and quality complemented by promotional messages should however match customers' expectations. Physical evidence should reflect the price of the product complemented by current technology used for information systems and online bookings.

4.3.3.10 Discriminatory pricing

Tourism prices can be adjusted to suit different consumers, locations and times. This means that the same product may be priced at two or more different prices, although the costs are the same. For example, a hotel may charge more for a room during busy times and charge less for the same room when it is not busy. Marketers may also use yield management to apply price discrimination to the target market. This means that consumers from one segment will be prevented from receiving prices intended for one another. For example, a hotel may want to charge business travellers more, it may require a month's advance booking for a cheaper room rate, compelling business travellers to pay a higher rate since they often cannot book in advance (Morrison, 2002:529).

4.3.3.11 Tactical pricing (based on volume and time of purchase)

Companies that buy large numbers of rooms in a hotel pay certain rates, either for a single period or throughout the year. For example, tourism associations organising a conference at a hotel may receive one free room per night for every 20 room-nights booked (George, 2001:190).

4.3.3.12 Psychological pricing

Here, the price is slightly adjusted to attract consumers. Psychological pricing avoids using prices such as R20, R50, or R100. Instead, prices are set slightly lower to reflect the perception of added value to customers. For example, to jump from R9, 95 to R10, 00 may look like a big increase, and instead, a marketer uses prices such as R19, 95 or R99. 00 (Morrison, 2002:534).

4.3.4 Pricing methods

Kotler, et. al. (2003:464-471) recommend the following pricing methods in the service industry:

4.3.4.1 Cost-orientated price determination

For profit purposes, the variable cost and average fixed cost of a product are calculated and a certain percentage is added to the cost (Kotler, et. al. 2003:492).

4.3.4.2 Competitor-orientated price determination

The organisation takes its pricing cue from the competition and may not necessarily implement equal price fixing. The competitor based-price does not depend on costs or demand of the product; nevertheless, one should focus on establishing the price against those of the competitors. It is crucial to know the following about the competitor:

- the organisation should at least have a list of prices of the competitors;

- the organisation should focus on possible competitors' price changes;

- the competitor is likely to react to any price changes, thus the organisation should have reactionary mechanisms in place for such eventualities;

- price changes have financial implications for the organisation. The organisation should have reserve finances that will enable it to survive periods of price changes;

- the organisational costs should be properly estimated to encourage profitability; and

- the competition's pricing strategy may lead to a price war amongst the competitors.

The organisation should have reserve finances that will enable it to survive price war periods. The organisation should not focus on one pricing strategy, but must have alternative strategies in place to keep up with the competition (Pender, 1999:205).

4.3.4.3 Value-based price determination

The value of a product's price is determined by the customer's willingness to pay for the product (Cravens, 1994:492). Price is based on what consumers think an offering is worth, and therefore marketers should first find out how much consumers are willing to pay for an offering with or without certain benefits. Marketers should also look at cost, competitor's prices and the customer's willingness to pay, and then decide on the price. The price should always be set around what the customer is willing to pay (George, 2001:188; Heath and Wall, 1992:146). When the organisation's pricing strategy is in place, the distribution strategy may follow.

4.4 DISTRIBUTION

According to Middleton and Clarke, (2001:292), "[a] distribution channel is any organised and serviced system, paid for out of marketing budgets and created or utilised to provide convenient points of sales or access to consumers, away from the location of production and consumption."

Distribution channels in the tourism industry include tour operators, travel agents and other intermediaries. These will be discussed as follows (Saayman and Slabbert, 2001:227):

4.4.1 Indirect tourism marketing intermediaries

Some of the indirect tourism intermediaries are:

4.4.1.1 Tour operators

The duty of the tour operator is to assemble the essential elements of a holiday: transport, accommodation, meals and attractions. He/she also combines different offerings and sells them as a package, sometimes through a travel agency. As an example, a package might include a return flight from Mauritius to Cape Town with SAA, seven nights' accommodation at Protea Hotels, and a trip to Robben Island (Lumsdon, 1997:189).

4.4.1.2 Travel Agencies

These are intermediaries who supply information on behalf of principal companies as well as other intermediaries. For example, Motsamai Travel may sell ancillary services, including travel insurance, foreign currency exchange, advice, information about visas, and they may also collect payments and holiday bookings. Travel agents receive a commission from tour operators and principals for customers' bookings using computer reservations (Laws and Dimitrios, 2002:6-7).

4.4.1.3 Tour brokers

Tour brokers sell attractive bus tours to different markets. Tours to townships, wine tours, trips to sporting events and religious events are examples of bus tours in Southern Africa (Kotler, et. al. 2003:505).

4.4.1.4 Consortia and franchises

Consortia and franchises allow companies to market products together without financial attachments. Consortia are common for marketing of tourist attractions such as hotels and travel agencies.

For example, SAA, Protea Hotels and Robben Island Museum in Cape Town can combine resources to produce thousands of brochures aimed at hotels, restaurants, tourist information centres and libraries, to make information available to tourists. Franchises allow companies to use their trademarks, names and advertising to maximize their distribution of offerings (Holloway, 1998:136).

4.4.1.5 Sales representatives

Sales representatives are recruited by principals to develop businesses that already exist and to create new business in a country. For example, a hotel in Johannesburg may hire a hotel representative in London (Briggs, 2001:145).

4.4.1.6 Convention/meeting planners

Convention/meeting planners plan and coordinate an organisation's external meeting events. Educational institutions, associations and government agencies are examples of markets for conventions and meetings (Morrison, 2002:340).

4.4.1.7 Incentive travel planners

These are tour operators who arrange and put together tailor-made packages that include accommodation, meals, tours, special functions and transportation for clients (Vellas and B'echerel, 1999:251).

4.4.1.8 National tourist agencies and information centres

Their purpose is to provide tourist information that is accessible to all, and tourists can book and reserve a variety of offerings through these centres. For example, SA Tourism markets internationally and makes bookings for accommodation and other tourist activities through its international offices (Saayman and Slabbert, 2001:254).

4.4.2 Direct marketing intermediaries

According to the Middleton, (2002:293-294); Vellas and B'echerel, (1999:238-277); O'Connor, (1999:21-29); George, (2001:204); Briggs, (2001:128-130); Burke and Resnick, (2000:206); Bly, (2002:122) and Ogilvy, (2000:146), the direct marketing intermediaries include the following:

4.4.2.1 Information technology

The distribution and selling of tourism offerings are shaped by the rapid development of information technology. These technological developments have made information available at all levels of the distribution system, also regarding the availability of offerings. For example, bookings for offerings can be made at the touch of a button. Due to the perishability and intangibility of the tourism offering, computers have helped to convey more up-to-date information about offerings, unlike brochures and timetables. The following are thus made available to consumers (Seaton and Bennet, 1996:431; Sheldon, 1997:1-2 and Buhalis, et. al. 1998:411):

- more information, and improved entertainment facilities (such as in-flight entertainment and information channels);
- improved operational tasks (such as room check-out) personalised service (the telephone operator acknowledges a guest by his/her name); and
- better service due to better departmental functioning in companies.

4.4.2.2 Central reservation systems and global distribution systems

These are programmes that provide online reservation facilities to travel agencies and other intermediaries. The central reservation system enables travel agencies to connect to thousands of principals around the world to book airline tickets; access reservation system information, book hotel rooms and car hire and make available information such as flight schedules (Middleton, 2002:293-294).

4.4.2.3 Point-of-sale systems

The point-of-sale system allows consumers to buy tickets directly at shops, or at departure points such as airports and train stations. This helps to minimise the time customers spend queuing (George 2008:273).

4.4.2.4 Multimedia kiosks

Such kiosks provide educational information and information directories. They are   alternatives to traditional printed travel literature (brochures), which take up a great deal of space and date quickly (George, 2001:204).

4.4.2.5 CD-ROM

A CD-Rom stores a large amount of information about destinations electronically, and consumers can view it at home (Bly, 2002:122).

4.4.2.6 The internet

The internet is a global network of computers linked by telephone lines and satellites. The internet allows tourism marketers direct access to potential consumers without losing money to intermediaries (Buhalis, et. al. 1998:411).

4.4.2.7 Digital television

Travel channels are used in conjunction with the internet and enable viewers to select text and pictures of tourism offerings, make purchases, and send messages back to selected travel agents (Bly, 2002:122).

4.4.2.8 Internet cafés

There are internet café's that serve food and also have internet linked-computers for the general public to use. They make it possible for travellers to meet and find information about the places they are visiting (George 2008:273).

4.4.2.9 Video conferencing

Video conferencing is an extension of the telephone system with video cameras added. Meetings and conferences may be conducted by business travellers through the system (Briggs, 2001:128-130).

4.4.2.10 Virtual reality

Virtual reality allows a customer to experience a situation visually and with sound added. This gives the customer a pre-experience of the service before the purchase (George 2008:273).

4.4.3 Choice of distribution channels

The company decides which channel of distribution to use and how much money will be needed. The decision is based on the position of the sales point, the feeling of the tourist about the tourism product, the marketing effectiveness, and the type of product, allocation of funds for distribution and the image of the agency. Dickman, (1999:228) and Middleton and Clarke, (2001:295-298) note the following distribution channels:

4.4.3.1 Consensus channels

Consensus channels refer to a situation when all parts of the channel work together because they have mutual interests. There is no one part of the channel that controls another.

For example, the Protea Hotels do business cooperatively, however they are managed independently (compare Strydom, 1992:182).

4.4.3.2 Vertically coordinated channels

Vertically coordinated channels mean that a single enterprise owns and controls the retail and distribution functions of production.

For example, the Nandos' franchising system is arranged in such a manner that Nandos' headquarters control the level of service delivery in all the franchised counterparts. The management and layout of the Nandos' franchise is controlled by headquarters (compare Strydom, 1992:182).

4.4.3.3 Vertically integrated channels

When vertically integrated channels are followed in the organisation, all the production functions and distribution are owned and controlled by one business. The vertically coordinated tour operator controls the channel based on one contractual financial benefit from retail agents. For example, Sure Astra Travel controls the bookings and tours that are booked through this agency (compare Strydom, 1992:182).

4.4.3.4 Multiple channel strategies

Multiple channel strategies are found when two or more different channels are used to distribute a product. There are two basic types of multiple channel strategies (Middleton and Clarke, 2001:296 and Strydom, 1992:181):

a) Complementary channels

Complementary channels refer to a situation where each channel serves a different market segment. They are used to reach untouched markets. For example, the South African Tourism Sho't Left project is used to stimulate domestic travel.

b) Competitive channels

Competitive channels involve two or more competitors distributing the same product. The foremost aim is to increase sales volume. For example, Protea Hotels and Holiday Inn offer the same product at the same time, competing for the same customer with the aim of making profits.

4.4.4 Monitoring and managing channels

A channel modification strategy can be applied to situations where a critical evaluation of existing channels indicates an unsatisfactory situation. Distribution channels need to be evaluated regularly to make required adjustments. Such adjustments are necessary, since tourism is likely to be affected by unexpected changes in the following areas (Heath and Wall, 1992:153):

- holiday habits and consumer markets;
- needs of clients;
- competitor's perspectives;
- sales changes in the market;
- existing products' sales volume; and
- promotion, price/product strategies.

Evaluation of existing distribution channels can take place, while taking into account issues such as distribution costs, market coverage, client service, marketing communications and control over distribution networks (compare Dickmann, 1999:230).

Once the distribution strategy is in place, the company may formulate promotional strategies.

4.5 PROMOTION

The promotional mix is a powerful tool used to make people aware of the existence of the product. The promotional mix consists of the following aspects: advertising, personal selling, sales promotion and publicity (Block and Robinson, 1994:1). The elements of promotion are discussed in figure 4.5.

Figure 4.5 Steps in developing an urban promotional strategy

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┌─────────────────────────────────────────────────────┐
│              IDENTIFY TARGET AUDIENCE                 │
└─────────────────────────────────────────────────────┘
                          │
                          ▼
┌─────────────────────────────────────────────────────┐
│          DETERMINE PROMOTIONAL OBJECTIVES             │
└─────────────────────────────────────────────────────┘
                          │
                          ▼
┌─────────────────────────────────────────────────────┐
│       DETERMINE THE PROMOTIONAL APPROPRIATION         │
└─────────────────────────────────────────────────────┘
                          │
                          ▼
┌─────────────────────────────────────────────────────┐
│         ESTABLISHING THE MIX OF PROMOTION             │
│                   COMPONENTS                          │
└─────────────────────────────────────────────────────┘
                          │
                          ▼
┌─────────────────────────────────────────────────────┐
│           SELECTING SPECIFIC STRATEGIES               │
└─────────────────────────────────────────────────────┘
```

| Sales promotion strategy | Personal selling strategy | Publicity strategy | Advertising strategy |
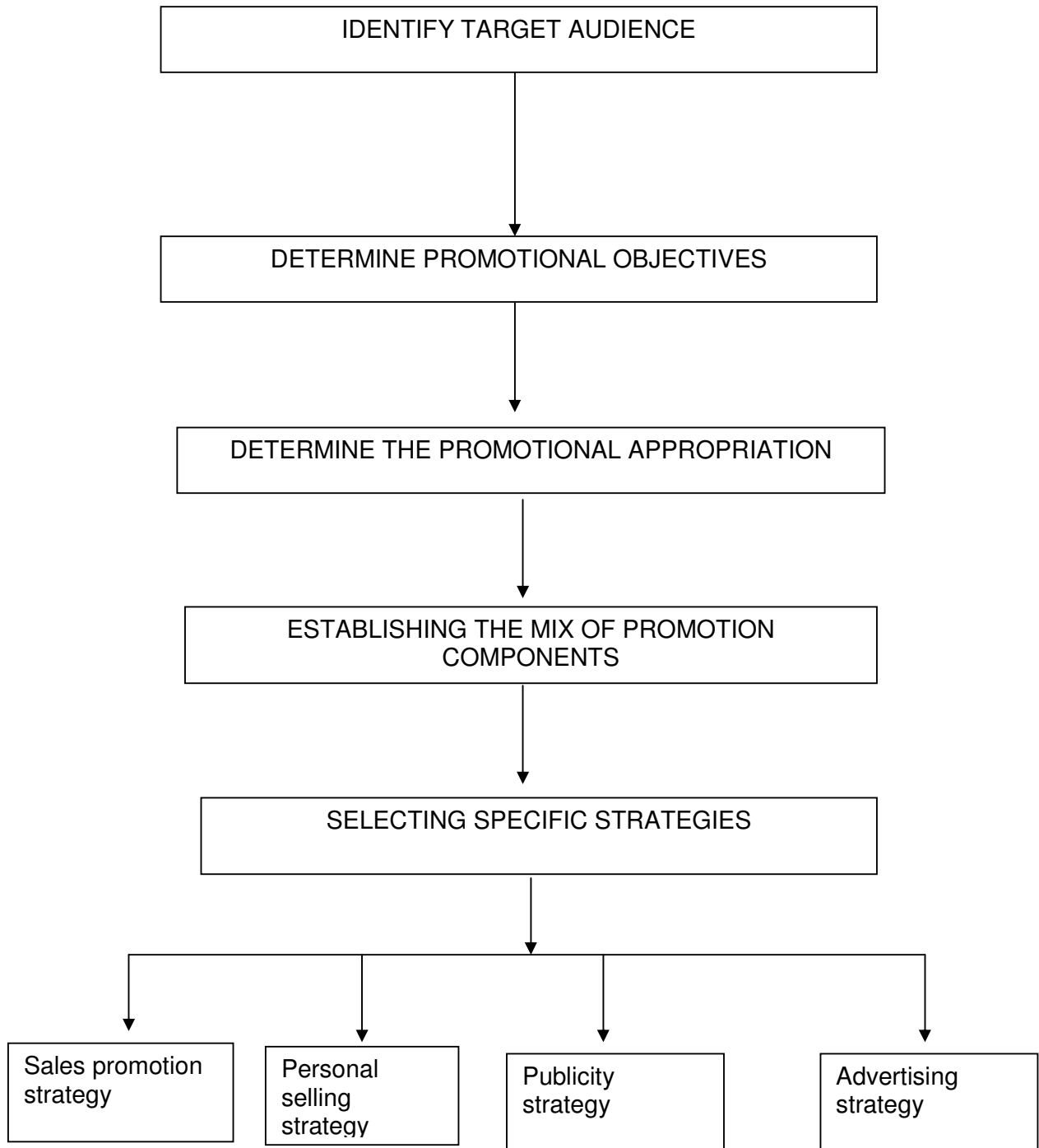
Adapted from: Heath and Wall, (1992:155)

A step-by-step analysis of figure 4.5 indicates the following:

4.5.1 Identifying the target market

Relevant target markets should be approached with relevant promotional messages (Wells, et. al. 2000:175). As for the intermediary's choice, the decision of which group to target with marketing messages depends on the organisation (Baack and Clow, 2004:338).

4.5.2 Determining promotional objectives and strategy

Determining promotional objectives and tasks follows the target audience identification. Objectives should reflect strategies that the organisation needs to take and should take into account which responses are legitimate (Wells, et. al. 2000 171-176 and Briggs,
2001:119-120).

According to Wilmhurst, (1999:77-78), the organisation should consider the following factors influencing promotional strategy:

- markets and products. The organisation should promote relevant products to the relevant markets;

- the product life cycle. Promotional budgets can be more expensive in the growth stage than in the maturity stage of the product life cycle;

- buyer behaviour. The manner in which the customers purchase the products influences the promotion timing. During the low demand periods, more promotional strategies are needed to increase the level of product demand; and

- competitors' activities. The competitors should be monitored and evaluated from time to time in terms of promotional strategies that they apply. This will help the organisation to keep up with the competitor promotion strategies.

4.5.3 Determining the promotional budget

The budget for promotion can be determined as follows (Wells, et. al. 2000:183-184 and Morrison, 2002:383):

- the affordable method. This means that one sets the promotional budget on what the organisation thinks it can afford. For example, the organisation will have to match their returns, expectations and the total capital set for promotion;

- competitive–parity method. The promotional expenditure is based on the expenditure of the competitors. The disadvantage is that this method assumes that the competitor is following the correct promotional strategies; and

- the objectives and task method. The organisation should decide on the total spending for promotion based on the specific objectives they want to attain.

Heath and Wall, (1992:153) points out that promotion consists of methods that within limitation are interchangeable, with some standing at a better position to obtain the envisaged results. Promotional methods include the following:

- advertising;
- personal sales;
- sales promotion; and
- publicity.

4.5.4 Advertising

According to Jefkin, (1992:3), "[a]dvertising is the means by which we make known what we have to sell or what we want to buy." Advertising is popular in the tourism industry, with heavy cost requirements.

Organisations should exercise care and efficiency when approaching and formulating advertising strategies. Marketing services have a contemporary purpose dictated by size, distance, cost, scale and convenience. Advertising seeks to address the need to communicate a message for private purposes or for commercial service and to inform and persuade. Advertising is diversified and must therefore be focused on a specific audience. Advertising can do the following (Aaker, et. al. 1992:90-94; Farbey, 1998:15 and Wilmhurst, 1999:23-24):

- create awareness. Customers prefer to deal with things they know or have heard of. It therefore helps to make things known. For example, loyal customers at Holiday Inn will rather use their services instead of their competitors;

- create and develop favourable attitudes. It helps to create a positive view of the product. For example, the KFC staff members' attitude towards the customer promotes the image of the company;

- brand identity development. It helps to invest the product with a unique set of characteristics. For example, McDonalds' chain stores are perceived by the customers to offer unique services;

- product positioning in the market. It helps to position the product in a market and to identify with it. The Kruger National Park is positioned as the biggest National Park in the Sub-Saharan Africa region;

- persuade. This means that one influences the customer to be interested in the product. This can be done through sales promotion, advertising, personal selling;

- create demand. This makes the product worthwhile, attainable and desirable. The advertising of products will make customers aware of the product and create demand for the product;

- build up enquiries. These serve as a bridge between product and sales to obtain price estimates, literature, and sample or price estimates. For example, the Protea Hotels advertising through the internet will make it easier for customers to obtain prices and the necessary information about services;

- support distributors. This means that suppliers will be strengthened in the local marketplace;

- help to sustain the organisation in the long-term. Help to strengthen, reinforce, consolidate, re-establish, explain or rebuild relationships of the organisation;

- launch new products. To convey launch messages to the public. For example, promotional activities may be held closer to the markets during the product launches. For example, Nandos may organise a sport tournament for university students with the aim of promoting new products;

- offset competition. Help meet and match competitors. For example, the Sandton Hotels can advertise their products to the same customers to whom Sun International is advertising its products;

- help provide a point of difference. Provide a unique personality, point of interest and features separating it from other products. For example, Avis Car Rental is advertised as the second best in the market and that has given it a unique position; and

- help reach people. When people cannot be reached due to economic reasons, advertising may be used. For example, Sun International may use less capital-consuming strategies to advertise their services, such as fliers, to reach their markets.

4.5.4.1 Advertising strategies

According to Aaker, et. al. *(*1996:252) and Farbey, (1998:30), the following questions should be answered to formulate advertising strategies:

a) Who is the target audience?

The identification of the relevant audience will assist the organisation to identify the relevant point of contact like the language to use for the marketing messages to the target market.

b) What is the problem?

The organisation should know the needs of the market to be able to draft relevant marketing messages.

c) What does the customer want?

It is important for the organisation to know the customers' expectations of the marketing messages sent to them to meet their expectations.

d) What are the principal assets or benefits?

The focus of marketing messages should be on the benefits that the customer will get from the product.

e) What is the importance to the economy?

The importance of the product to the economy can also be emphasised to the customer with the idea of pulling the customer's interest in the product.

4.5.4.2 Choosing among the media types

There are two broad types of media: print media and broadcast media. Print media consists of newspapers, magazines, guidebooks, outdoor advertising and direct mail. Broadcast media comprises the internet, CD-Rom, radio, television, cinema, video tape and presentations on personal computers (George, 2004:231). Media selection is based on the consideration of factors such as the size of readership or viewer ship of different media. Radio and television provide a very good medium for reaching listeners in rural areas.

Table 4.1 outlines the various South African print and broadcast media.

Table 4.1 Usage of printed and broadcast media by percentage of adult population in South Africa, 2006-2007

TELEVISION	2006	2007	Percent
SABC 1	68,5%	71,6%	3,1
SABC 2	54,9%	60,7%	5,8
SABC 3	41,4%	47,8%	6,4
M-NET	10,1%	7,3%	-2,8
DSTV	6,9%	9,7%	2,8
e TV	55,6%	59,7%	4,1
RADIO			
RADIO	92,7%	93,5%	0,8
COMMERCIAL	90,2%	91,1%	0,9
COMMUNITY	18,7%	17,1%	-1,6

Adapted from: South African Advertising Research Foundation, (2007)

According to Table 4.1, in 2006, the SABC 1 channel had a total of 68.5 percent of the audience and it grew up to 71,6 percent in the year 2007, which accounted for 3,1 percent growth. The marketers may have to consider advertising on the SABC 1 channel for the purpose of reaching the largest television market in South Africa.

The SABC 1 channel is followed by the SABC 2 channel, which in the year 2006 had a total of 54,9 percent viewer ship. This grew to 60,7 percent viewership, which accounted for 5,8 percent growth. The SABC 3 channel has the highest growth rate of viewership from 41,4 percent in the year 2006 to 47,8 percent in the year 2007, which accounts for 6 percent growth. The marketers may use the SABC 3 channel as a future advertising medium. SABC radio has a larger number of listeners amongst the adult population than the commercial radio. However, the commercial radio is the largest in terms of growth of listener ship. It grew from 90,2 percent in the year 2006, to a total of 91,1 percent in the year 2007. This accounts for 0,9 percent growth.

The marketers may use both the radio and commercial radio to convey marketing messages to the relevant target markets. The organisation should consider costs attached to advertising in any category of promotion. It can be very costly to advertise on the radio and television. The organisation should, however, target the relevant tools that they can use to advertise cost-effectively (Sissors and Baron, 2002:34-35). Table 4.2 indicates the top ten favourite radio stations in South Africa.

Table 4.2 Top ten favourite radio stations in South Africa, June 2008

Radio	Population	Percentage of listener ship
Ukhozi	4 325 000	13,9
Umhlobo Wenene fm	3 423 000	11,0
Lesedi fm	2 286 000	7,3
Thobela fm	2 071 000	6,7
Motsweding	1 810 000	5,8
Metro fm	1 711 000	5,5
RSG	1 137 000	3,7
97.2 Jacaranda	980 000	3,1
East Coast Radio	947 000	3,0
Gagasi 99.5	919 000	3,0

Adapted from: South African Advertising Research Foundation, (2008)

According to Table 4.2, Ukhosi, has the highest number of listeners in South Africa, which is 13,9 percent. Ukhosi is followed by Umhlobo Wenene fm with a total of 11,0 percent listener ship in South Africa. The marketers can use these radio stations extensively for the purpose of reaching the large population of radio listeners. Lesedi fm and Thobela fm are in the same range of listener ship with a slight difference of 0,6 percent. The marketers should consider the language and cultural issues attached to these radio stations when marketing through them. Table 4.3 indicates the newspaper readership percentages in South Africa.

Table 4.3 The newspaper readership by percentage of the total population in the provinces in South Africa, 2008

Province	2006	2007	Difference
Gauteng	58,0%	67,7%	9,7
Limpopo	28,4%	41,7%	13,3
Mpumalanga	33,2%	45,0%	11,8
Free State	32,6%	35,1%	2,5
Kwazulu Natal	39,6%	39,6%	0
Eastern Cape	25,2%	27,2%	2
Western Cape	66,0%	66,7%	0,7
Northern Cape	37,3%	43,1%	5,8
North West	38,3%	42,4%	4,1

Adapted from: South African Advertising Research Foundation, (2008)

According to Table 4.3, Gauteng has the highest percentage of newspaper readers in South Africa with a total of 67,7 percent. This compares to the year 2006 when the total was 58,0 percent of readers. Gauteng is followed by Western Cape with a total of 66,7 percent readership in the year 2007. The marketers can use newspapers extensively for the purpose of advertising in Gauteng and the Western Cape provinces.

Limpopo province has the highest growth rate of newspaper readership in the country, from 28,4 percent in the year 2006, it climbed to 41,7 percent in the year 2007, which accounts for 13,3 percent growth. The marketers can use Limpopo in the future for newspaper advertising.

4.5.4.3 Media strategies

According to Strydom, (1992:242) and George (2001:231) the aim of media strategies is to choose the correct media through which promotional messages can be conveyed to the target markets.

Such advertising strategies involve the following:

- newspapers that are regularly published and deliver a quick response;
- magazines can be used for colour and quality printing. They can reach the target markets easily. However, the printed information may be outdated when it reaches the customer since is compiled a long time before publication;
- brochures can be used because of high flexibility and they can be used as a guide by customers;
- television. Picture and sound can be combined, however it is an expensive and short-term advertising medium;
- radio. The costs are low and the advertisements are brief and unlikely to be heard by listeners;
- cinema. These advertisements have the advantage of sound, colour and picture movement;
- direct post. Their cost is high; however, they have the ability to reach large numbers of customers. They can easily be ignored; and
- outdoor advertisements are large and easily convey messages. However, the relatively high costs should be taken into consideration (compare Sissors and Baron; 2002:35).

The following factors are very important in the choice of media (Strydom, 1992:242-245 and George 2001:232-233).

- cost-per-thousand-contacts-comparison. Here the criteria used are based on the most cost-effective way to reach a large audience;
- bringing together target audience and media features. Here customers and the media profile are compiled and brought together. However, costs must not be ignored; and
- advertising copy strategy. Here the focus is on the words, symbols, colour, and layout of an advertisement.

The company needs to decide on strategies that should be implemented for advertising purposes. These strategies may be decided upon and implemented based on the usage of printed and broadcast media by percentages of each population.

4.5.5 Personal selling

According to Mondy, et. al. (1998:2-16), "[p]ersonal selling is an interpersonal process that involves the seller engaging in some kind of face-to-face or direct contact with prospective consumers in order to persuade them to make a purchase or a booking."

Kolb, (2006:285) indicates that when anyone in the office tells the tourists about what a city can offer that forms part of personal selling.

4.5.5.1 Types of personal selling in tourism

According to Marks, (1997:10); Kolb, (2006) and Kay, (2003:14-15), personal selling can be presented in various categories, namely:

a) Internal selling

These are efforts made within a company to obtain sales, and include face-to-face transactions such as a travel agent selling a holiday to customers.

b) External selling

The business comes face-to-face with the customer outside the company and makes presentations about the product. An example of this would be a hotel sales representative who calls on corporations to book conference facilities and large numbers of rooms. In addition, there are sales representatives of airlines, cruise lines, and tour operators who visit travel agencies in the hope of selling products.

This is a very expensive and time-consuming selling technique because it involves employing and training a sales force that follows a series of personal selling steps.

c) Prospecting

Prospecting involves the sales representative identifying prospects or potential consumers for the company.

d) Preplanning

The company sales staff needs to know as much as possible about the prospective consumers or company. The information about the company will make it possible for the sales person to answer questions from the consumer.

e) Demonstrating the offering

Demonstrating the product involves presenting the facts about the offering to the potential consumers who may buy the offering.

f) Dealing with enquiries

Enquiries are based on sales presentations concerning price, choices, purchasing deadlines, or meeting additional needs of customers.

g) Closing the sale

The sales person must get the client to pay for, or reserve the offering.

h) Telephone sales

Buyers usually regard cold calling, where the sales representative randomly calls prospective consumers, as irritating and intrusive.

Telephone sales have nonetheless, become an important part of external selling and are particularly effective after a consumer has shown interest by perhaps responding to an advertisement.

i) Passive personal selling

A service-based industry such as the tourism industry provides an experience for consumers and employs a high number of staff who has daily contact with people. Hotel waiters, bar staff, porters, chambermaids, coach drivers and airline cabin crew all come into contact with consumers and are essentially part of the sales staff. Similarly, staff uniform, presentation, behaviour, telephone techniques and body language all affect the image of the company and are important factors to be considered in personal selling and, ultimately, in promoting the company.

j) Personal skills

An employee's appearance and presentation are very important. Clothing, hairstyles and hygiene must be in line with the image of the company. Of equal importance is the way that an employee deals with consumers. A friendly smile, eye contact, confidence and a listening ear make up the ingredients of retaining the customer (George, 2001:248-250; Marks, 1997:10).

4.5.6 Sales promotion

The following discussion is based on definition and important areas of sales promotion.

4.5.6.1 Definition of sales promotion

According to Schultz and Beth, (1999:6), sales promotion is an element of the marketing mix other than advertising, selling, or public relations.

Yenship, (2006:7) indicates that sales promotion is "a planned and implemented marketing activity that both enhances product or service appeal and changes customer behaviour positively in return for an additional benefit for purchase or participation". Sales promotion can be anything to do with special offers. This happens when the business has conducted its market research and results in relevant messages being developed for a specific target market.

4.5.6.2 Specific areas of sales promotion in the tourism and hospitality industry

According to Cummins, et. al. (1998:115-128) and Yenship, (2006:147-215), the following sales promotion tools can be used in the service industry:

a) Merchandise/point-of-sale material

These include posters, brochure dispensers, counter cards and window displays widely used in the tourism industry. Airlines also give away in-flight magazines.
For example, SAA provides Sawubona magazines and flight bags that include a comb, washing kit and a pair of socks.

b) Sampling

Sampling refers to giving away free samples of items to encourage sales. "Taster" sessions are often used as part of exhibitions to make tourism destinations tangible. For example, the South African winemakers in Stellenbosch may give away a sample of items to attract consumers.

c) Coupons/vouchers

These are certificates that offer consumers services when they buy specific products. Such items can be used in the restaurant industry, hotels and tourist attractions, as well as cruise lines.

Coupons can be distributed through print media: newspapers, door-to-door distribution and promotional packs. All of these provide free entry or discounts.

d) Discounts

Discounts are the most popular type of sales promotion. These entail a reduction of price without coupons or vouchers and can be introduced immediately, for example at restaurants and hotels (two for the price of one, and children eat for free and stay for free).

e) Patronage awards

These are known as loyalty incentives aimed at the current market.
A good example is that South African Airways may offer free air miles or frequent-flier points to regular users. These points can be converted into free travel, hotel rooms and free car hire.

f) Competitions

These include contests such as sweepstakes and games with an opportunity to win money or a holiday. For example, a hotel may introduce cards that can be used at the casino to replace money and customers may use empty cards to win more money on their cards.

g) Gifts and premiums

Premiums are merchandise items given for free in exchange for a purchased product. For example, a restaurant may give away promotional items such as caps, t-shirts and stationery with its name printed on them.

h) Exhibitions

This is where all sectors of tourism come together, and it allows consumers to experience the product away from the product.

4.5.7 Publicity

According to Smith, et. al. (1991:1) publicity: "[i]ncludes all the activities designed to build and maintain mutual understanding between a tourism and hospitality company and public." An example is the Sun International financial sponsorship to the Nelson Mandela Foundation in South Africa.

4.5.7.1 Publicity forms

According to Kincaid, (1998:372); Mersham, (2001:8-9); Marconi, (2004:22) and Deuschl, (2006:4-6) the following constitute forms of publicity:

a) News releases

News releases are organised by the organisation with a deliberate intention of pulling the customers and the general public to a specific new development in a hotel.

b) Editorials (or features)

Editorials are the marketing mechanisms that are used by companies to draw the customers' attention to the product's selling point, for example the restaurant's location in a city mall.

c) Press launches

Press launches are used by companies generally to market changes, innovations and new products to the general public. For example, SAA launched Mango Airline as the affordable domestic flight in South Africa.

d) Receptions

Receptions are normally used by companies to lobby and influence targeted guests in terms of buying the product.

e) Staged events such as a theme event or major sporting events

Staged events attract the attention of the media, and in turn, the media broadcasts these events on mediums like television for the general public and tourists.

f) Product visits such as TV holiday programmes

Companies can also arrange sponsored customers or television crew product visits with the aim of giving publicity to their offering.

4.5.8 E-marketing

According to Reedy, et. al. (2000:4-5), electronic marketing is all the online or electronic-based activities that facilitate the manufacturing of the products according to the customer needs and wants and the selling of the products to the customers.

It is the network technology focused on market research, product development, strategies of effectively selling the product to the customers, ways in which the product can be distributed to the customer, keeping the customers' records, researching the customer satisfaction survey and keeping records of customers' feedback.

According to Kotler, et. al. (2003:689) and Kleindl, (2003:5-7), e-marketing is the marketing part of the e-commerce. E-commerce is about the buying and selling process supported by the internet. E-business is the part of e-commerce concentrating on electronic exchanges between the company's employees and management like the intranets, extranets and the internet.

The tourism product marketers should integrate electronic marketing as part of the daily business practice. It is a powerful tool that can build healthy customer relationships, reduce marketing costs and increase the pace at which the service is delivered to the customers. In the same breath, the use of e-marketing can also benefit the customers in terms of making it easy and convenient to purchase products in the comfort and privacy of their homes without travelling to the company premises.

4.5.8.1 Forms of E-marketing

According to Peterson, (1997:39), Smith and Chaffey, (2005:7-9), and Inkpen, (1998:178-180), forms of e-marketing include the following:

a) Internet

The World Wide Web (internet) is the software and hardware communication tool that is very critical for the success of the e-marketing inside the company. The internet connects universities, government laboratories, businesses, and individuals around the world. The company can use the internet to send information to customers and customers can immediately reply and purchase the product. The internet domains include the following (Rayport and Jaworski, 2004:4-5 and Smith and Chaffey, 2005:138-158):

- business to consumer (B2C) e-commerce. The companies design websites and load product details that they need to sell directly to the consumer. For example, the pricerunner.com website;
- business to business (B2B) e-commerce. This type of electronic selling is normally used by the suppliers to market their products to tourism organisations. Example, the EC21.com website;

- customer to customer (C2C) e-commerce. The customers contact each other and exchange information about goods and products. For an example, the ebay.com website; and

- customer to business (C2B) e-commerce. Customers can contact the companies with suggestions, questions or also give feedback on their experiences during their involvement with the company. For example, the priceline.com website (Smith and Chaffey, 2005:7-9).

b) Interactive Digital Television.

It allows the direct response from the audience. The buyer is able to go through the complete process off buying and make an offer to purchase in the comfort of his home (George, 2008:273).

c) WAP Mobile phone

Companies can use the mobile phone to see customer's profile. They can also inform customers about specials and discounts. In the United Kingdom, customers select their airline seat preferences using their mobile telephones (George, 2008:273).

d) DVD and CD

Information such as data, video clips, images and animations about a company can be loaded on the DVD's to catch the customer's attention (Kotler, et. al. 2003:693).

4.5.9 The promotion mix decision

According to Powers and Hsu, (2002:68) and George, (2004:220), the promotions mix refers to all the necessary components that can be used by the marketer for a communication campaign. The company marketing situation and promotional objectives will determine the promotional mix adjustments.

When the company chooses to use all the elements that constitute the promotional mix, it is called integrated marketing. Integrated marketing includes sales promotion, advertising, personal selling and publicity used together to achieve the organisation promotional goal. The advantages of promotional marketing are:

• increase of relative market share;
• the organisation will have a variety of tools to use to capture a large market;
• promotional costs will be saved;
• the product can reach different markets; and
• permits the organisation flexibility to best promote their products.

When the marketer applies integrated marketing, he or she can achieve profitability with a variety of promotional mixes including advertising, personal selling, sales promotion, direct marketing, printed literature, sponsorship and public relations. A cost-effective mechanism may entail the organisation deciding to alternate among the promotional mix tools.

For example, management may use the public relations department together with the marketing department. This strategy will create effective contributions from all the departments operating in promotions. The marketing manager may decide to use sales promotion to achieve faster sales and the marketer may, in turn, decide to use personal selling to attract more customers to the product.

4.6   CONCLUSION

This chapter dealt with strategic marketing issues. The strategic marketing issues discussed in this chapter include product mix, price, distribution and promotion mix. When the organisation has these marketing factors in place, the efforts of formulating marketing strategies and mapping out future marketing planning will be effective.

However, timely, flexible strategy adjustments should be practised in accordance with changing environments. The next chapter will discuss the marketing plan.

CHAPTER 5

THE MARKETING PLAN

5.1 INTRODUCTION

According to George, (2001:58), "[m]arketing planning is the process by which a tourism and hospitality company attempts to analyse its existing resources and marketing environment in order to predict the direction it should take in the future."

Marketing planning is important since it ensures that the tourism marketer targets the right markets and segments; it ensures cost-effectiveness and causes marketers to focus on one offering at a time. In the tourism industry, marketing planning focuses the company on its objectives, shape and corporate mission statements, and encourages the company also to focus on the strengths and weaknesses as complemented by the company's plans for the future (compare McDonald, 2002:27-28).

The tourism industry is characterised by different forms and sizes of marketing planning. For example, in hotel groups, airlines and destinations, the planning assumes a formal approach and is normally written down in a document known as the marketing plan (Hatton, 2000:6).

5.2 THE FUNCTIONS OF THE MARKETING PLAN

According to Cohen, (2001:2), "[a] marketing plan is essential for every business operation and for efficient and effective marketing of any product or service." The marketing plan will help the company to clearly focus on where it is going and how it plans to get there. The marketing plan will also direct the company as to how much time, effort and resources are needed to accomplish its goals. According to Cohen, (2001:2) and Dibb and Bradley, (1996:4), the marketing plan has the following functions:

- the marketing plan acts as a road map;
- the marketing plan stimulates thinking and aims to make better use of resources;
- the marketing plan assigns responsibilities, tasks and timing;
- the marketing plan predicts problems, opportunities and threats;
- the marketing plan assists with the management's control and implementation of strategy;
- the marketing plan informs new participants of their roles and functions; and
- the marketing plan plots the acquisition of resources for implementation.

A more detailed discussion of the functions follows.

5.2.1 The marketing plan acts as a road map

The purpose of a road map is to describe the geographical terrain as well as to identify different roads, distances, times, speed, resting places, accommodation or repairs. Like a road map, the marketing plan explains:

- the environment you are going to find yourself in;
- how to begin your plan in order to reach your objectives and goals; and
- the environment of the marketplace comprising of competitors, laws, politics, regulations, economic and business conditions, the state of technology, forecast demand, social and cultural factors, target market, and the company's overall resources.

5.2.2 The marketing plan stimulates thinking and aims to make better use of resources

The marketing plan assists one towards doing less yet obtaining maximum results, it helps with one rand to do the work of ten rands, builds one's strengths and reduces one's weaknesses, and it thus helps the company to obtain a competitive edge against competitors. As one is working on the plan, new ideas will be generated.

It will help one to anticipate many helpful opportunities to identify obstacles that may hinder the process (compare McDonald, 1995:140-143 and Hieberg and Cooper, 2003:91-93).

5.2.3 The marketing plan assigns responsibilities, tasks and timing

According to Cohen, (2001:4), "[n]o strategy will ever be better than those who implement it." If this is the case, it follows that timing and delegation are crucial. The marketing plan will outline different responsibilities within the organisation.

5.2.4 The marketing plan predicts problems, opportunities and threats

The marketing plan exposes problems, opportunities and threats that may challenge the company. This will help to focus one's mind as to how to anticipate the threats, problems and opportunities that lie ahead. The company management should have a strategy in place that will help them identify opportunities and threats. The marketing plan should therefore be designed to take advantage of opportunities, propose solutions to problems and avoid threats.

5.2.5 The marketing plan assists with the management's control and implementation of strategy

A strategy refers to the route one is taking. The route that one takes is situated within a physical and geographical environment. On the road, different problems such as bad weather may occur and interfere with one's planned strategy. Almost nothing goes exactly as planned originally. In the same manner, the marketing plan should make room to accommodate alternative paths in order to arrive at the destination with relative ease. The marketing plan must distinguish clearly between what is happening during the implementation of the strategy, and what is envisioned to take place.

This will create a measure of power and control over corrective actions necessary to put one's project back where it is supposed to be and to reach the desired objective (compare Hatton, 2000:30-45).

5.2.6 The marketing plan informs new participants of their roles and functions

For a strategy to be successful, coordination between different actions is needed – both inside and outside the organisation. Relevant role players should be informed of their responsibilities and tasks in terms of how they fit into the strategy. The marketing plan should present in detail to everyone how they fit into the strategy and how their actions should fit with actions of others. This will help new people to be up-to-date regarding their responsibilities.

The marketing plan is thus a document that explains the objectives to all participants and by whom, with what, and when objectives will be met (compare Lancaster and Massingham, 1996; 164-168).

5.2.7 The marketing plan plots the acquisition of resources for implementation

For any project that the business wants to achieve, the resources to accomplish the project are always limited. Marketing plans play a major role in attracting investors, people, money and other assets to the project. The marketing plan may also be used as a sales tool since one has to convince investors that capital, goods and labour will be utilised in an efficient and effective manner to achieve objectives despite competitor and other potential threats. The marketing plan provides power and control over the project with regard to actions, costs and alternatives from start to finish (compare Bradley and Dibb, 1996:4).

5.3 BENEFITS OF MARKETING PLANS

The marketing plan can benefit the organisation in the following manner (Briggs, 1997:44; Cohen, 2001:4 and Goetsch and Stanley, 1995:21-23):

- the marketing plan allows for self-examinations through swot analyses;
- marketing planning result in innovations, especially those new ideas that produce future growth;
- resources are utilised more effectively and costs are reduced since they are controllable;
- there is better organisation and accountability because of the delegating of responsibilities concerning managerial duties. This is enhanced by the fact that deadlines or the accomplishment time of objectives are set;
- marketing planning anticipates the future by foreseeing and anticipating solving problems;
- the budget of the company will be realistic since the marketing planning outlines the expected expenditure and highlights warnings of any deviations along the way to be dealt with in advance;
- the marketing planning leads to participation of all levels of the company. As a result, thinking is promoted, problems are anticipated and answers are provided. The involvement of all levels of management results in building a team spirit, better morale, and increased productivity (Kotler. et. al. 2003:54);
- a good marketing plan helps the company to obtain investments and sponsorships; and
- marketing planning results in innovations and new ideas that produce future growth.

Marketing plans do not indicate a compulsory route to be followed instead they are directive. Marketing plans are not mandatory; they give direction to the organisation. They encourage uncompromised commitment to marketing planning.

They do not predict and dictate direction towards the future; instead, they help the organisation to gather resources that will help them create the future (compare Kotler, et. al. 2003:75).

5.4 MISTAKES IN DEVELOPING A MARKETING PLAN

A business should avoid the following mistakes when formulating the marketing plans (Benveniste, 1989; 59-86; Hatton, 2000:30; McDonald and Payne, 1996:45-50):

- thinking that top management will delegate the planning to the planner;
- failing to focus on long-term planning;
- failing to develop suitable company goals that help the organisation in developing a marketing plan;
- failing to commit to the process of marketing planning;
- failing to use plans as standards for measuring managerial performance;
- the absence of a climate in the company that allows for efficient planning;
- thinking that marketing planning is something apart from the entire management process;
- absence of review meetings between top management and departmental or divisional heads regarding plans;
- the company making intuitive decisions that may contradict the marketing planning;
- the company putting in a great deal of work and expecting maximum results;
- thinking that there is a white paper that cannot be amended until the next planning cycle;
- "false prophecy" that the marketing planning will solve all the problems; and
- ignoring the fact that planning is a management tool that can improve management's capabilities.

5.5 CHARACTERISTICS OF MARKETING PLANS

The marketing plan is characterised by the following factors (Blackwell, 2002:4-5; Hieberg and Cooper, 2003:89; Johnson, 1993:1):

• understandable. It should be organised and readable. All involved should be able to make sense of the written plan;

• complete. The planning must contain all elements of the marketing planning;

• specific. The marketing plan must contain specific and accountable goals, objectives, strategies and tasks;

• adaptable. It should have strategies that are responsive to external environments suitable to company goals and resources; and

• flexible. The marketing plan should be flexible so that it can be adapted to changing market environments or unpredictable events.

5.6 TYPES OF MARKETING PLANS

Marketing plans are categorised depending on the purposes they aim to achieve. There are two different types (Cohen, 2001:5 and Hatton, 2000:31-32):

5.6.1 The new product plan

This is the marketing plan prepared for a product, service, product line or brand that is not known by the market. The new product plan can be designed before the project development starts, because this will allow alternatives to be created in time before major resources are committed. The new product marketing plan also creates a general idea of what cost and proper timing of competitive projects will be. A new product plan presents more "unknowns" because it has not been proved by the market and has no track record within the company.

5.6.2 Annual marketing plans

Annual marketing plans are created for products, services and brands already in the company's product line. The plan may be adjusted from time to time. Annual marketing plans should be reviewed annually to allow the company to implement necessary changes in terms of opportunities, threats and problems that took place during the course of the budget year.

Annual plans are intended for the future, meaning that there may still be unknown environmental factors that will challenge the business, and therefore the business should forecast, assume or research environmental information. The annual plans may also be planned for several years and reviewed annually.

5.7 APPROACHES TO THE MARKETING PLAN

According to McDonald and Payne, (1996:32), there are six approaches to marketing planning (compare Blackwell, 2002:8-15; Hatton 2000-35; Hieberg and Cooper, 2003:89):

5.7.1 A planning model

The problems are tabled and information is researched to find solutions for given problems. The planning provides a framework from which understanding and communication can be modelled within the organisation and creates a platform of problem analysing. However, its weakness is based on assumptions in terms of the environmental predictions over the strategic time-span. The planning model therefore does not guarantee effectiveness in terms of responding to environmental impacts since strategies will be implemented for the first time.

5.7.2 An interpretative model

In the interpretative model, stakeholders are highly committed and represent their wishes. The stakeholders make decisions about the goals and objectives that the organisation must follow. The disadvantage is that the strategies are only based on what the stakeholders can benefit from.

5.7.3 A political model

Discussions are held with stakeholders, and decisions regarding the best strategy are reached through compromise, conflict and consensus. Those who have more power, influence the strategy to be followed.

5.7.4 A logical incremental model

Strategies are based on needs that the company is aware of, rather than the analytical process of the model. Serious issues are given priority for example, bargaining power orientated issues. The personal success is promoted and organisational success undermined.

5.7.5 An ecological model

Due to unforeseen circumstances resulting from the external environments, the organisation finds itself under pressure to take immediate decisions. This does not allow the organisation's management enough time to look at alternative strategies. The disadvantage of this model is that it does not provide decision makers with a chance to consider alternative strategies.

5.7.6 A visionary leadership model

The leader provides the strategy. His/her commitment, personal credibility and the manner in which he/she communicates the strategy to others builds the organisation's momentum.

The visionary model builds confidence amongst decision makers. The disadvantage is that the organisation may be trapped in the status quo and be unable to adapt to change.

5.8 OBSTACLES TO MARKETING PLANNING

According to Hatton, (2000:30-53), the following are obstacles to marketing planning:

• when the business strategies and objectives are confused after being formulated. The organisation should refer to objectives when formulating strategies. Clashing strategies and objectives will cause the organisation to cloud their vision and lose direction. This will result in the organisation's failure to achieve objectives;

• when the business separates the marketing foundations from its operations. It is always important for everyone in the organisation to be involved in marketing planning and the implementation thereof;

• when the company creates confusion between the marketing function and the marketing concept. The marketing function is there to ensure the organisation's effectiveness in implementing marketing concepts such as promotional activities. The organisation should have effective marketing mix concepts in place to achieve end results;

• a lack of in-depth analysis. Ignorance from the organisation in terms of researching the relevant aspects necessary for a complete marketing plan will result in ineffective planning;

• the organisational processes and strategies are confused. Strategies should not be confused with the organisational process of service delivery.

The organisational processes can eliminate the effectiveness of strategies when used to implement strategies. The organisation should therefore allow for fresh implementation of strategies from time to time;

- when there is insufficient availability of knowledge and skills. Knowledge and skills of marketing planning are necessary to ensure quality results. In the absence of skills and information, experts can be invited to the organisation to share knowledge before planning is commenced;

- when a systematic approach is not followed when formulating the marketing plan. A random approach in formulating the marketing plan will result in an incomplete marketing plan since there will be no starting point or ending point;

- when the organisation fails to prioritise the objectives. Un-prioritised objectives result in the organisation spending more on unimportant objectives at the expense of the most important objectives;

- the presence of a hostile corporate culture. It is very important for the organisation to have a harmonious corporate culture, since this will create a positive environment for the organisation to produce a workable marketing plan;

- short-terminism. This refers to the fact that it is easier for managers to plan their strategies to achieve the current budget instead of concerning themselves with the future;

- weak support from the chief executive and top management. When the chief executive does not understand the need for marketing planning and shows no active interest, it will be impossible for the senior marketing executive to improve marketing planning;

- lack of a plan for planning. Mobilising top management's support, communication throughout the company, and training programmes should form part of the company's plan for marketing planning;

- lack of line management support. The line management support staff are those involved in delivering a service in the company, therefore their inputs in the marketing planning process are necessary;

- confusion over planning terms. The marketing planning process is handled by professionals who use complex terminology in the planning process. Marketing professionals, should, however not use complex terminology when addressing operational staff. They should rather make their language understandable to everybody. Where for example, words like "objectives," are used, they must be explained to avoid misunderstanding;

- over-reliance on numbers. The company should focus more on how they see their current situation and what impact it has on their performance, rather than being excited about numbers projecting them into the future;

- too much detail, too far ahead. What is needed by the company marketing planners is information with high quality intelligence, not large quantities of data. Too much data can de-motivate and demoralise planners; and

- once-a-year ritual. The once-a-year ritual of looking at the marketing plan alone does not prove that the company takes its marketing planning seriously. A company that takes its marketing planning seriously will compile a plan and spread it over the entire year, to perform evaluations and adjustments from time to time.

5.9 APPROACHES TO OVERCOME BARRIERS TO MARKETING PLANNING

According to Dibb, et. al. (1996:5) and McDonald, (1999:515), the following principles can be applied to overcome the barriers to marketing planning:

Principle 1: Strategy before tactics

The strategic marketing plan should be developed first, and when it is in place, the tactical plan may follow. The company should then write the year plan first and work on it.

Principle 2: Situate marketing within operations

Marketing strategies should include the customer as far as possible. Sales reports and marketing should be attached to a specific individual such as the marketing director, as the responsibility attached to these should not be on the shoulders of top management alone.

Principle 3: Shared values about marketing

Marketing means the identification of the needs of the target market with the aim of satisfying them and gaining profitability for the company. Marketing begins with an attitude of mind, not with functional activities. Marketers should therefore first position the company properly in the minds of the customers to create positive attitudes towards the product.

Principle 4: Structure around markets

The company should organise its marketing activities around their group of customers. Marketing activities should therefore not be organised around functional activities. The unavailability of quality market planning will lead to the plan having poor and limited value.

Principle 5: Scan the environment thoroughly

The marketing audit can take place effectively when:

- the company designs a checklist for the market audit;
- the company management should not use terms like "poor economic conditions" when formulating growth strategies, because these are too wide to define. However, specific definitions of economic conditions should be applied; and
- the company should include elements of marketing planning such as critical success factors, swot analyses, company mission, competitive positioning, product mix and promotion to ensure the success and effectiveness of the market planning.

Principle 6: Skills and Knowledge

The company should make sure that all those involved in marketing planning have the necessary skills and knowledge for the job. They should make sure that those involved know how to use the most important tools of marketing such as information, positioning, product life cycle, portfolio management, product price, place and promotion. The marketing staff should also have sound communication and interpersonal skills.

Principle 7: Summarise information in a swot analysis

A marketing plan's foundation is information. Intelligence comes from external and internal information that describes the marketing plan, which in turn explains how management see their position against that of their competitors, what objectives they want to achieve, how they aim to achieve their objectives and what results they want to see.

Principle 8: Systematise the process

The company should have a set of written procedures and an agreed upon format for marketing planning. The purpose of this is to ensure that all key issues are taken into consideration, to bring together all the elements of strategic planning in a consistent manner, and to help management to understand the conditions and prospects of the organisation.

Principle 9: Sequence objectives

The company should see to it that objectives are prioritised according to their impact on the company and according to urgency. Resources should also be allocated appropriately.

Principle 10: Style and culture

Marketing planning effectiveness depends on the effective support and participation of leaders. The marketing plan should not contradict the organisational phase or lifeline. Before the marketing plan is formulated, the organisation should investigate the phase in which the organisation finds itself.

5.10   SUMMARY OF THE MARKETING PLAN

Table 5.1 summarises the marketing plan format.

Table 5.1 Summary of the marketing plan

Phase 1 Goal setting	Critical success factors Competitor profile Priorities	Competitor analysis
	Mission statement	

Phase 2
Situation review
	Market overview
	    → Market structure
	    → Market trends
	    → Key market segments
	    → Gap analysis
		Market research
		Market segmentation studies
		Gap analysis
		Product life cycle analysis
		Forecasting
		Market research

	Opportunities/Threats (By product) (By segment) (Overall)	Issue management
	Strengths/Weaknesses (By product) (By segment) (Overall) Issues to be addressed (By product) (By segment) (Overall)	Market segmentation studies
	Portfolio summary	BCG matrix

Phase 3
Strategy formulation
	Marketing objectives (By product)
	(By segment)
	(Overall)
	    → Strategic focus
	    → Product mix
	    → Product development
	    → Product deletion
	    → Market extension
	    → Target customer groups
		BCG matrix
		Gap analysis

Phase 4
Marketing mix
	Marketing strategies (4 x 4 Ps)
	(Positioning/branding)
	    → Product
	    → Price
	    → Promotion
	    → Place
		Market segmentation studies
		Market studies
		Response elasticities
		Competitive strategies

Adapted from: MacDonald, (1999:518)

Table 5.1 is explained as follows:

The following are the main steps in the marketing planning process:

• phase one. The company should determine the critical success factors, which are factors that are important for an organisation to succeed. The organisation's priorities should be tabled. The person in charge of each priority must be appointed and the time frame for achieving these objectives must be set. The competitor strengths and weaknesses should also be analysed at this stage. The organisation should review the mission statement at this stage;

• phase two. The organisation should analyse its strengths based on the swot analyses. The analyses should be based on the target markets and the product. Complimentary analyses information can be obtained from the market research, gap analyses, product lifecycle analyses, forecasting and market segmentation studies;

• phase three. At this stage, the company can develop product and marketing strategies. The Boston consulting portfolio analysis and the gap analysis mechanisms can be implemented; and

• phase four. The organisation can formulate the promotional strategies at this stage. This can be done by using the advertising, personal selling, sales promotion and publicity. The organisation should consider the best price strategies to be implemented at this stage. The information can be obtained through market segmentation studies, market studies, price elasticity response and competitive strategies.

The strategy decisions in the marketing plan should be based upon the customers' and stakeholders' views (compare Kotler, et. al. 2003:754; 781, McDonald, 1999:520).

The summary of how each step in the marketing planning process can be completed is explained in figure 5.1.

Figure 5.1 Completion of each step in the planning process

This is the marketing planning process. It must not be confused with what appears in the plan itself, which is described on the right.

This is what business units managers must present in their strategic marketing plans (instructions on how to do this are contained in the following sections)

March
Planning team "kick-off" meetings with business units managers to discuss overall guidelines for the three-year planning period

Between March and May
Managers carry out marketing audits. Unit managers complete gap analyses and agree on them together with the planning team

Stage 1 meetings

Mav
Planning team discuss three-year business plans with business units managers and amend them as necessary

Stage 2 meetings

November
Present amended three-year plan and detailed one-year plans to planning team

December
Consolidation of one-year and three-year plans

March
1 Unit mission statement
2 Summary of business units performance previous year
3 Summary of financial projection for the next three years
4 A market overview
5 SWOT analyses (of major products/markets)
6 Portfolio summary
7 Major assumptions
8 Marketing objectives and strategies for the next three years
9 Financial projections for the next three years

Between September & October
Prepare detailed one-year operational plan with forecasts and budgets

Adapted from: McDonald, (1999:522)

5.11 GUIDELINES TO DEVELOP A MARKETING PLAN

The format that the top management may apply in developing the marketing plan is as follows (compare Hatton, 2000:47, McDonald, 1995:31-33, Pitt, 1998:214-213):

5.11.1 Role/contribution

The company should provide a brief statement about its growth rate in turnover and profit.

5.11.2 Definition of the business

The company should explain the needs it fulfils or the benefits it provides to the customer.

5.11.3 Distinctive competence

This means that the business should not be unique, but substantial and sustainable with regard to the following areas: technology, distribution, strength, international coverage, reputation and integrity.

5.11.4 Indication for future direction

The company should give clear guidelines for its future growth:
• top management can draw the portfolio matrix illustrating the current and proposed relative position of each of the strategic businesses;
• a few words explaining the growth in turnover and profit margin may be included; and
• a graph may be drawn to indicate the total long-term plan on turnover and profit. The company should include a bar chart showing the relevant financial history based on profit and turnover for the past five years.

5.11.5 Financial goals (next five years)

The company should demonstrate its financial goals, turnover and profit for the next five years. A bar chart graph can be used for this purpose.

5.11.6 Appendices

The company may attach as many appendices as necessary without overdoing it.

5.11.7 Timetable

The organisation should have in place a timetable that will clearly indicate what needs to be done by each department. As an example, the marketing planning teams will therefore assign responsibilities and target dates to each team as follows:

• financial team – target date such as (01.01.2010). Responsibilities include ensuring growth in gross margins, profits and cash flow;

• manpower and organisation team – target date (01.05.2010). Responsibilities include ensuring satisfaction to employees through training and remuneration; and

• marketing team – target date (01.08.2010). Responsibilities include identifying target markets and satisfying their needs.

5.11.8 Top-down and bottom-up planning

All levels of the company should have an understanding of the marketing planning objectives to be achieved and how to achieve them. After the planning has been completed, it should be accepted by all managers. Each manager should perform a swot analysis and set three-year objectives and strategies.

The top-down and bottom-up planning can also be done by means of the strategic and operational cycle. The strategic and operational cycle is discussed in Figure 5.2.

Figure 5.2: Strategic and operational planning cycle

Release plan for
implementation

Consolidation

Start Jan 1

"Stage two"
meetings and
presentation

Planning team's
"kick-off" meetings

Prepare tactical
(one-year)
operational plans
and budgets

Marketing audits,
gap analyses

SWOT analyses,
objectives, strategies,
budgets (proposed)
three years

Finalise three
year strategic
marketing plans

"Stage one" meetings
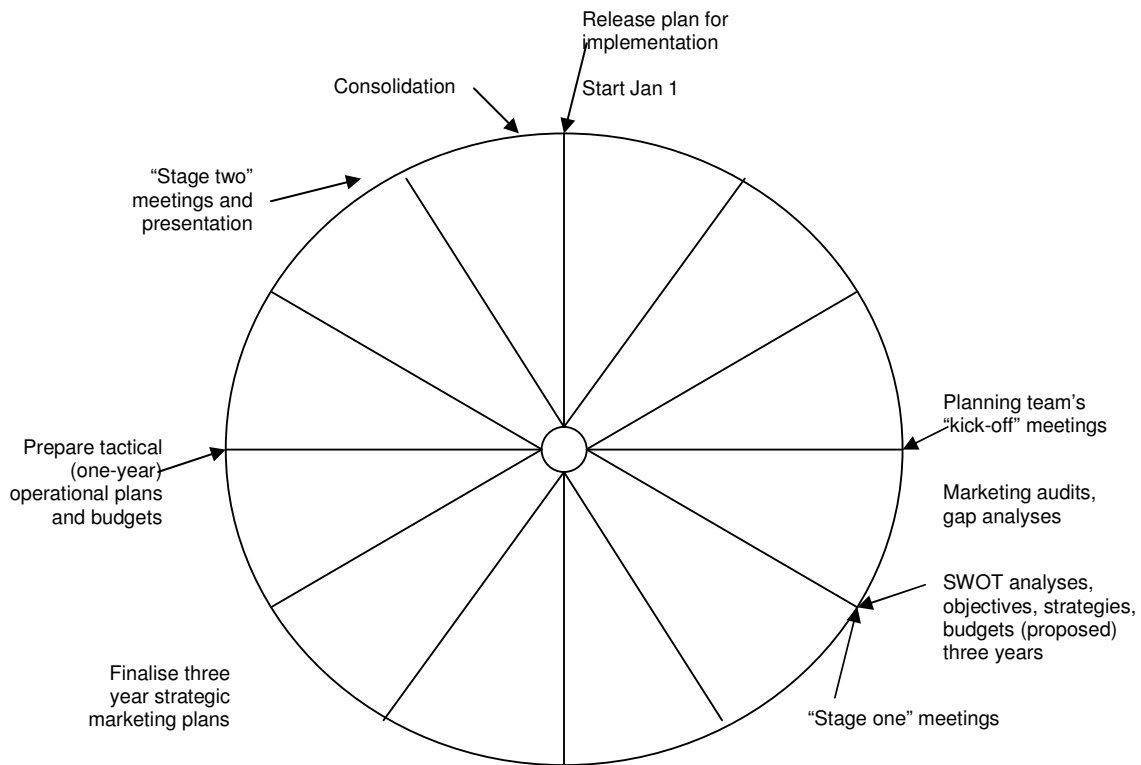
Adapted from: McDonald, (1999:570) and Goetsch and Stanley, (1995:34)

To elucidate figure 5.2 the major steps in the annual planning cycle are listed below and shown schematically.

Activity	Deadline
• Planning teams meetings with managers to discuss overall guidelines for the three year planning period.	31 March
• Prepare marketing audits, swot analyses, proposed marketing objectives, strategies and budgets.	31 March
• "Stage one" meetings: presentation to the planning team for review.	31 May
• Prepare short-term (one-year) operational plans and budgets.	31 October
• "Stage two" meetings: presentation to the planning team.	31 November
• Final consolidation of the marketing plan.	31 December

Adapted from: McDonald, (1999:571)

5.12 RELATIONSHIP BETWEEN MARKETING PLANNING AND MARKETING RESEARCH

Marketing research is the systematic and objective collection, analysis and interpretation of information for decision-making about marketing problems of all kinds, using recognised, scientific methods (Martins, et. al. 1996:6, Middleton and Clarke, 2001:171). Marketing research is important in strategic marketing planning for the following reasons (compare Churchill and Iacobucci, 2002:4 and Kotler, et. al. 2003:166-167):

• Decision and risk. Marketing research helps marketing planners to reduce the risk of making wrong decisions; these include decisions pertaining to pricing and promotions.

- Forecasting. Forecasting means looking into the future and predicting, scientifically, what the future will be like. Research assists marketing planners to stay abreast of changes and to predict the future.

- Knowledge of consumers. Marketing research provides marketing planners with information regarding consumers and how their needs and wants are met.

- Information about competitors. Research establishes the nature and range of the competitors' market share, advertising budget, image, product development, strengths and weaknesses, and also creates a benchmark to measure the company.

5.13 CONCLUSION

The process of marketing planning is not completed until the plan is put into action. The marketing planning process includes analysing, planning, implementation and monitoring. Any company that operates without a strategic marketing plan is like a moving ship without a rudder. Such a company runs the risk of investing its money where there is no guarantee of returns. The strategic marketing plan is therefore crucial to avoid capital loss in the company.

CHAPTER 6

EMPIRICAL RESEARCH RESULTS

6.1 INTRODUCTION

The objective of this research was set out in Chapter one, namely to develop a strategic tourism marketing plan for the Mangaung Tourism area. The researcher assumes that the absence of a clear strategic tourism marketing plan in Mangaung retards the marketing and development efforts of tourism. It is in this light that the researcher examined the validity and reliability of these assumptions with the sole idea of developing a strategic marketing plan for the Mangaung Tourism area.

6.2 ANALYSIS OF EMPIRICAL INVESTIGATIONS (BOARD OF DIRECTORS)

The following discussion is based on the Mangaung Tourism area Board of Directors empirical investigation analysis.

6.2.1 Strategic planning issues

The Mangaung Tourism area Board of Directors empirical investigation responses based on the strategic planning issues is analysed as follows:

6.2.1.1 Goals and objectives of Mangaung Tourism area

The first question in the questionnaire aimed to find out from the respondents if they could define goals and objectives that are important for the tourism industry to be successful in an area like Mangaung. The positive responses regarding this question will determine the most important factors that need to be considered as goals and objectives for the Mangaung Tourism area.

Table 6.1 Goals and Objectives

Goals and Objectives	Total	Percentage of the responses
To acknowledge all stakeholders	8	67
Get financial backup	11	92
Make sure Mangaung is not only a stop over place	9	75
Develop Mangaung's standard of living through tourism	5	42
Change the concept that Mangaung is an event destination only	3	25
To establish a proper brand for Mangaung	1	8
Serve as a destination marketing organisation	12	100
To elevate and communicate the brand	3	25
To work together with product owners	7	58
To be prominent in the business chamber	4	33
To educate local communities about tourism	11	92
To make sure that there is appropriate signage	2	17
To attract tourists to the Mangaung area	10	90
To create job opportunities	2	17

Table 6.1 indicates that 100 percent of the participants were of the opinion that the goal of the Mangaung Tourism area should be to serve as a destination marketing organisation.

Ninety-two percent of the respondents felt that local communities' tourism education should be one of the goals of Mangaung Tourism, while another 92 percent is of the opinion that the getting of sufficient finances should become one of the objectives of the Mangaung Tourism area. Another 90 percent of the respondents felt that one of the primary roles of the Mangaung Tourism area should be to attract tourists to the area.

6.2.1.2 Mission statement of the Mangaung Tourism area

The second question wanted respondents to give their general view of the mission statement of the Mangaung Tourism area. Describing the mission statement of the Mangaung Tourism area would demonstrate the level of respondents' understanding of the organisation's future direction.

Table 6.2 Mission Statement

Mission	Total	Percentage of the responses
To be reviewed	1	8,3
Not available	7	5,8
Not sure	1	8,3
Only for the white market	1	8,3
Excludes Mangaung, Botshabelo and Thaba Nchu	1	8,3
Ideally, to incorporate the inhabitants of the Mangaung area to be actively involved in the tourism activities of the area, to alleviate poverty and create jobs for the youth.	1	8,3

According to table 6.2 the majority of the participants answered the question negatively. Fifty-eight percent of the respondents are not aware of a mission statement, while 8 percent of the respondents were not sure of the mission statement and the same percentage again felt that it needs to be reviewed.

6.2.1.3 The target markets of Mangaung Tourism area

The third question wanted the respondents to identify the target markets of the Mangaung Tourism area. Their response to the question will indicate whether the Mangaung Tourism area has a target market to focus on.

Table 6.3 Target markets

Target Market	Total	Percentage of the responses
National sports people	8	67
Business people	8	67
Not so classical leisure tourists	1	8
Local communities	10	83
European tourists	4	33
Holiday travellers	10	90
Gauteng tourists	8	67
Durban tourists	3	25
China tourists	1	8
Mangaung Municipal area	8	67
Transport	1	8
Stop over customers N8 and N1	11	92
Middle class tourists	6	50
Youth tourists	3	25

Table 6.3 indicates that 92 percent of the respondents indicated that stop over customers travelling on the N8 and N1 are the major target markets, while 83 percent of the respondents indicated that the local community also form a significant part of the target market. Ninety percent indicated holiday travellers as also part of the target market, while 67 percent of the respondents mentioned business orientated markets and national sports people as part of the target market of the Mangaung Tourism area.

6.2.1.4 Differentiation of the Mangaung Tourism brand name from the competitors

The fourth question wanted to find out from the respondents if the Mangaung Tourism brand is different from that of the competitor's. The question did not require a yes or no answer. Responses to the question will indicate whether the Mangaung Tourism brand is unique in comparison to that of the competitors.

Table 6.4 Brand Name

Brand Name	Total	Percentage of the responses
There is no brand	1	8.3
No impact	3	25
Not yet relevant	1	8.3
Need to be improved	5	42
Mangaung is a unique name	1	8.3
Should identify what the name stand for/ Cheetahs	1	8.3

Table 6.4 indicates that 42 percent of the respondents indicated that the brand name needs to be improved to stand out against that of the competition, while 25 percent indicated that the Mangaung brand name does not have an impact. Only 8 percent felt that Mangaung is a unique name.

6.2.2 Marketing planning issues

The following discussion will be based on the empirical responses that constitute marketing planning issues.

6.2.2.1 Pricing strategy in the Mangaung Tourism area

The fifth question wanted to determine a pricing strategy that the respondents have in mind for the Mangaung Tourism area. Responses to the question will indicate the relevant pricing strategy that the Mangaung Tourism area can consider.

Table 6.5 Price

Pricing	Total	Percentage of the responses
Affordability should be considered due to high unemployment amongst the youth	1	8,3
Profitability should be considered	1	8,3
Cost based pricing	2	17
Leave it in the hands of the stakeholders	2	17
Market related pricing	2	17
Value based pricing	4	33,3

Table 6.5 indicates that 33 percent of the respondents felt that the value-based pricing method should be considered for implementation. Seventeen percent of the respondents indicated that a market-related pricing strategy should be considered, and another 17 percent of the respondents indicated it should be left in the hands of the Mangaung Tourism area stakeholders to individually decide on price.

The other respondents indicated that the cost-based profitability and affordability methods should be considered for the pricing of products and services in Mangaung.

6.2.2.2 Standard of services offered in the Mangaung Tourism area

The sixth question wanted the respondents to describe the services' standards in the Mangaung Tourism area. The question was aimed at determining how respondents rate service delivery in terms of standards between poor and good.

Table 6.6 Service Standards

Service Standards	Total	Percentage of responses
Poor services to good services.	5	42
There is no road side tourism products signage	1	8,3
Streets are pathetic	1	8,3
No editorials to educate communities	1	8,3
Dominated by poor services	1	8,3
Black areas not up to standard	1	8,3
Still developing	1	8,3
Not enough professional: Exhibitors, media release, festivals, community outreach Projects	1	8,3

Table 6.6 indicates that the majority of the respondents (42%) felt that the services standards in the Mangaung Tourism area range from poor services to good services.

The other 8 percent responses only indicated specific events like not enough exhibitors; still developing service delivery and black areas services are not up to standard, as indicated in table 6.6.

6.2.2.3 Distribution of the Mangaung Tourism area's products

The seventh question was aimed at finding out the respondents' opinion in terms of how the products of the Mangaung Tourism area should be distributed.

Table 6.7 Distribution

Distribution	Total	Percentage of the responses
Not compete with high class leisure destinations	1	8,3
Use Indaba	6	50
Tourism information centers	6	50
Workshops	4	33
Electronic medium	10	83

It is indicated in Table 6.7 that 83 percent of the respondents favoured the electronic media as part of distributing the products of the Mangaung Tourism area. Another 33 percent of the respondents indicated that workshops with intermediaries about Mangaung products would be the best vehicle to distribute the Mangaung Tourism area's products, while 50 percent of respondents favoured promotion oriented methods and the annual Tourism Indaba in Durban to distribute the tourism products.

6.2.2.4 The promotion of the Mangaung Tourism area's products

The eighth question wanted to establish from the respondents ways and means in which the Mangaung Tourism area should be promoted based on personal selling, advertising, sales promotions and publicity. The question gave the respondents an opportunity to provide their own viewpoints in terms of the effective promotion of tourism in Mangaung.

Table 6.8. Personal Selling

Personal Selling	Total	Percentage of the responses
Word of mouth	9	75
Use distinctive projects like Free State Mokete Music Awards	1	8,3
Tour guides training/personal selling skills	5	42
Tourism Indaba	10	83

Table 6.8 indicates that 83 percent of the respondents favoured the annual Tourism Indaba as a means of promoting the products of the Mangaung Tourism area. Seventy-five percent of the respondents indicated that positive word of mouth would be the best strategy to promote Mangaung Tourism's products, while 42 percent of respondents indicated tour guides training should include personal selling skills. A further 8 percent of the respondents indicated that the Mangaung Tourism area should take advantage of events such as the Free State Mokete Music Awards in terms of selling tourism products.

Table 6.9 Advertising

Advertising	Total	Percentage of the responses
CD's and DVD's	8	67
Billboards	12	100
Television	12	100
Brochures	12	100
Newspapers	11	92
In-house Bulletin	9	75
In-flight Magazines	8	67
Foreign Affairs	1	8,3
City Networks	1	8,3

Table 6.9 indicates that 100 percent of the respondents favoured billboards as a means of promoting the products of the Mangaung Tourism area. A 100 percent of the respondents indicated that television and brochures would be the best strategy to promote the Mangaung Tourism area products, while 92 percent of the respondents indicated that newspapers should be used to advertise the Mangaung Tourism area's products because of their affordability. Other respondents suggested advertising tools like in-house bulletins; in-flight magazines and newspapers as indicated in table 6.9.

Table 6.10 Sales Promotion

Sales Promotion	Total	Percentage of the responses
Radio jingles and competitions	6	50
Packaging of prices	2	17
Take advantage of sports activities	6	50
Use events and festivals	9	75
Establish joint effort amongst everybody	1	8,3

Table 6.10 indicates that 75 percent of the respondents indicated that the Mangaung Tourism area should promote tourism products during the festivals in Mangaung. Another 50 percent of the respondents indicated that sports events would be the best strategy of promoting the Mangaung Tourism area's products. A further 50 percent of the respondents indicated that radio jingles and competitions should be used to promote the Mangaung Tourism area's products, while 17 percent of the respondents indicated that the Mangaung Tourism area should consider packaging prices for tourists who want to use tourism products in Mangaung.

Table 6.11 Publicity

Publicity	Total	Percentage of the responses
Print and electronic media	10	83
Community outreach programmes	4	33
Sponsors, stakeholders marketing efforts	8	67
Roadshows	7	58
Press statements	10	83
Media releases	10	83

Table 6.11 indicates that 83 percent of the respondents favoured printed and electronic media as a means of promoting the products of the Mangaung Tourism area. Another 83 percent of the respondents indicated that media releases and press statements would be the best strategy of promoting the Mangaung Tourism area's products. Sixty-seven percent of respondents indicated that the Mangaung Tourism area should fund the stakeholders marketing efforts, while 33 percent of respondents indicated that community outreaches are a good publicity tool that should be used by the Mangaung Tourism area.

The above discussion is based on an analysis of empirical research findings amongst the Mangaung Tourism Board of Directors and the following discussion will be based on an analysis of empirical research results from the Mangaung Tourism area stakeholders.

6.3 ANALYSIS OF EMPIRICAL INVESTIGATIONS (STAKEHOLDERS)

The following discussion is based on the Mangaung Tourism area stakeholder's empirical investigation analysis.

6.3.1 Critical success factors of the Mangaung Tourism area

The first question on the questionnaire wanted to determine from the respondents what the critical success factors are for areas like Mangaung. The question did not require a yes or no answer. Responses to the question will indicate those factors that are important for an organisation like the Mangaung Tourism area to be successful.

Table 6.12 Critical success factors

Critical success factors	Total	Percentages of the responses
Effective marketing	55	87
Networking	54	86
Good finances	57	90
Information database	43	68
Better town planning	52	82

Table 6.12 indicates that 90 percent of the respondents indicated good finances as the most critical success factor for successful tourism management, followed by effective marketing (87%) and stakeholders networking (86%). Eighty-two percent of the respondents indicated better town planning as a critical success factor and 68 percent indicated the existence of a good information database.

6.3.2 Strengths of the Mangaung Tourism area

The second question wanted to establish the strengths of the Mangaung Tourism area. The question did not require a yes or no answer. Responses to the question will clarify those elements of the tourism offering in the Mangaung Tourism area that are regarded as strengths.

Table 6.13 indicates that 92 percent of the respondents indicated that the availability of rich historical sites is a strength for the Mangaung area, while 88 percent of the respondents indicated that Mangaung is a sustainable stop-over destination. The availability of beautiful scenery (87%) and sufficient accommodation (87%) were also indicated as strengths.

A total of 66 percent of the respondents indicated accessibility as a major strength for the Mangaung Tourism area, while 63 percent of the respondents indicated that the availability of conference facilities and tourist attractions serve as strengths for the Mangaung area.

Table 6.13 Strengths of the Mangaung Tourism area

Strengths	Total	Percentage of the responses
Private resorts	24	38
Hospitality	22	35
Events	38	60
Tourism attractions	40	63
Accommodation	55	87
Advertising	37	59
Conference facilities	40	63
Halfway stop	60	88
Township tourism	12	19
Contact with stakeholders	18	28
Sport	25	40
Museums	33	52
Affordability in terms of best price ranges	18	28
Beautiful scenery	55	87
Historical sites	58	92
Friendly environment	32	51
Cultural diversity	1	1
Accessibility	42	66
Networking	39	61
Nothing	1	1
Restaurants	38	60
Business tourism	6	6
Affordability	22	34
Four seasons experienced	1	1
Accessibility	12	19
Training SMME's	8	13
Information availability	6	9
Airport	1	1
Growing as a conference centre	50	75
Attractions uniqueness	22	34
Base for Free State	1	1
CEO Mangaung Tourism	1	1

6.3.3 Weaknesses of the Mangaung Tourism area

The third question establishes the respondents' perceived weaknesses of the Mangaung Tourism area. The question did not require a yes or no answer. Responses to the question will highlight what respondents regard as weaknesses in the Mangaung Tourism area.

Table 6.14 Weaknesses of the Mangaung Tourism area

Weaknesses	Total	Percentages of the responses
Not appearing on the national tourism routes	35	55
Poor marketing	60	95
Poor developments of tourism attractions	34	54
Poor budgets	41	65
Less tour operators	25	40
Information availability	22	35
Poor services	33	52
Poor interaction with local communities	12	19
Lack of communication	24	38
Poor signage	2	3.1
Lack of commitment from SALGA	31	49
Corruption	3	5
Political interference	15	23

Table 6.14 indicates that 95 percent of the respondents indicated poor marketing of tourism products and services as the most critical weakness for the Mangaung Tourism area. Sixty-five percent of the respondents indicated that poor budgets are a weakness for the Mangaung area, while 55 percent feel that the exclusion of the Mangaung area on the national tourism routes is a weakness.

Fifty-two percent of the respondents indicated that poor service offered by some of the tourism product owners in Mangaung is a weakness for the Mangaung area.

6.3.4 Opportunities in the Mangaung Tourism area

The fourth question wanted to find out from the respondents which opportunities the Mangaung Tourism area has to consider in planning actions. The question did not require a yes or no answer. Responses to the question will indicate whether the Mangaung area has any current or future opportunities that the Mangaung Tourism area can take advantage of.

Table 6.15 Opportunities of the Mangaung Tourism area

Opportunities	Total	Percentages of the responses
Central geographic location	62	98
Growing conference market	57	90
New black market	18	28
Use tour operators effectively	5	8.3
Historical attractions	42	67
Enough venues	33	52
2010 Soccer World Cup	59	94
New convention centre	51	81
Unexploited tourism routes/ township routes	25	25
Few international events	4	6
Decentralising activities from Bloemfontein	16	25
Close to Lesotho	35	55

Table 6.15 indicates that ninety eight percent of the respondents indicated that the central location of Mangaung is an opportunity. Ninety-four percent of the respondents indicated that the 2010 Soccer World Cup is an opportunity for the Mangaung area, while 90 percent of the respondents indicated the growth in the conference market in South Africa as a major opportunity for the Mangaung Tourism area. Eighty-one percent of the respondents indicated the Mangaung planned convention centre as an opportunity and sixty seven percent suggested that the rich historical sites are a major opportunity for Mangaung, especially to foreign tourists.

6.3.5 Threats for the Mangaung Tourism area

The fifth question wanted to find out from the respondents if there were specific threats to the Mangaung Tourism area that they can identify. The question did not require a yes or no answer. Responses to the question will indicate whether the Mangaung Tourism area is faced with threats.

Table 6.16 Threats for the Mangaung Tourism area

Threats	Total	Percentages of the responses
Few airlines	22	35
Perception of Bloemfontein as stopover destination	54	86
Poor budgets	59	94
Under utilization of attractions	8	13
Preferential treatment	5	8
Security	59	94
Slow cultural integration	1	1,5
Political positions in Mangaung Tourism	22	35
One man show	21	33
Monopoly of tour operators	21	33

Table 6.16 indicates that 94 percent of the respondents indicated poor budgets for tourism activities as a major threat for the Mangaung Tourism area. Another 94 percent of the respondents indicated that a lack of security is a threat for this area, while 86 percent suggested that the perception of the Bloemfontein area as a stop over destination is a major threat for Mangaung, especially with regard to foreign tourists.

Another 35 percent of respondents indicated that the few airlines landing at the airport is a threat to the expansion of tourism in Mangaung. The other respondents indicated politically motivated issues in general as a threat.

6.3.6 Major competitors for the Mangaung Tourism area

The sixth question wanted to establish from the respondents the existing and major competitor's of the Mangaung Tourism area. The question did not require a yes or no answer. Responses to the question will indicate the major competitors of the Mangaung Tourism area.

Table 6.17 Major competitors for the Mangaung Tourism area

Competitors	Total	Percentages of the responses
Kimberley	35	55
Durban	15	23
Parys	10	16
Cape Town	5	8
Johannesburg	10	16
Welkom	5	8
Maseru	16	25
Colesberg	1	1
Motheo district	4	6
Eastern Free State	8	13
Grahamstown	6	9

Table 6.17 indicates that 55 percent of the respondents indicated Kimberley as a major competitor for the Mangaung Tourism area. Twenty-five percent of the respondents indicated that Maseru is an immediate competitor for the Mangaung Tourism area, while 23 percent suggested Durban as a competitor for Mangaung, especially with regard to the foreign markets.

6.3.7 The most important competitor for the Mangaung Tourism area

The seventh question wanted to establish from the respondents the major competitor of the Mangaung Tourism area. Responses to the question will indicate if the respondents have the knowledge and perception to identify who is the competitor.

Table 6.18 Important competitor for the Mangaung Tourism area

Important competitor	Total	Percentages of the responses
Kimberley	35	55

Table 6.18 indicates that the majority of the respondents (55 percent) indicated Kimberley as the major competitor of the Mangaung Tourism area.

6.3.8 The strengths, weaknesses and competitive advantage of the most important competitor

The eighth question wanted the respondent to describe the most important competitor in terms of strengths, weaknesses and competitive advantage. Responses to the question will indicate which strengths, weaknesses and competitive edge differentiate the Mangaung Tourism area from the competitor.

Table 6.19 Competitor strengths

Strengths of competitor	Total	Percentages of the responses
Big Hole	23	36
New markets	18	28

Table 6.19 indicates that 36 percent of the respondents indicated that the Big Hole mine serves as the major strength of the competitor while 28 percent of the respondents indicated new markets like a growing working class in the townships as the major strength of the competitor.

Table 6.20 Competitor weaknesses

Weaknesses of competitor	Total	Percentages of the responses
Not centrally located	23	36
No airport	10	19

Table 6.20 indicates that 36 percent of the respondents indicated poor location of the competitor as a major weakness. Nineteen percent of the respondents indicated that the absence of an international and national airport of significance is a weakness for the competitor of the Mangaung Tourism area.

Table 6.21 Competitive advantages of competitor

Competitive edge	Total	Percentages of the responses
Uniqueness of attractions	23	36

Table 6.21 indicates that 36 percent of the respondents indicated the uniqueness of the attractions like the Big Hole serves as a competitive advantage. Other respondents did not have an idea about the competitive advantage.

6.3.9 Positioning of the Mangaung Tourism area in the market

The ninth question wanted to find out from the respondents how the Mangaung Tourism area should be positioned against the competitors. Responses to the question will indicate whether the Mangaung Tourism area is positioned as unique when compared to the competitor.

Table 6.22 Mangaung Tourism area's position in the market

Mangaung positioning	Total	Percentages of the responses
Conference destination	53	84
Holiday destination	21	33
Sports destination	51	81
Accommodation destination	48	76
Cultural destination	44	70

Table 6.22 indicates that 84 percent of the respondents indicated that Mangaung should be positioned as a conference destination followed by a sports destination at 81 percent. Seventy-six percent of the respondents indicated that the availability of accommodation in Bloemfontein should be emphasised, while 70 percent of the respondents would like to position Mangaung as a cultural destination. Only 33 percent of the respondents would like to position Mangaung as a holiday destination.

6.3.10 The major priorities for the Mangaung Tourism area for the term 2008–2010

The tenth question wanted to establish from the respondents, the major priorities of the Mangaung Tourism area for the term 2008-2010. Responses to the question will lay the foundation for the priorities that should be addressed by the Mangaung Tourism area.

Table 6.23 Priorities of the Mangaung Tourism area from 2008 until 2010.

Priorities	Total	Percentages of the responses
Conference destination development	48	76
Get more festivals	35	55
More sports activities	22	35
Upgrade current attractions	32	51
Security of tourists	41	65
Exploitation of historical sites	1	1
Information databases development	1	1
Training the SMME'S	25	40
Funding	42	67
Local communities involvement	25	40
Include Botshabelo and Thaba Nchu	37	59
Re-organise the governing body	35	55
More flights	11	17
Attract sports events	5	8
Proudly Mangaung citizen campaign	1	1
Cleaning of parks and streets	1	1
Affordability of service	15	24
Upgrade roads	43	68
2010 preparations in terms of service delivery	59	93

Table 6.23 indicates that 93 percent of the respondents indicated that the Mangaung Tourism area should plan to deliver excellent services in 2010 when the Soccer World Cup takes place in South Africa. A total of 76 percent of the respondents indicated that the Mangaung Tourism area should develop Mangaung as a conference destination. Sixty-eight percent indicated the upgrading of Mangaung area's roads. Sixty-seven percent suggested fundraising as a priority.

Sixty-five percent of respondents indicated security should be improved in the Mangaung Tourism area. Fifty-five percent indicated the introduction of new events like annual festivals should be a priority, while another 55 percent indicated that the Mangaung Tourism area's governing body should be re-organised. The other respondents emphasised infrastructural facilities and service delivery logistics to be prioritised.

6.4. CONCLUSION

The chapter focused on data that was collected from the stakeholders and the board of directors of the Mangaung Tourism area. Respondents' different views in terms of factors that need to be incorporated in the strategic marketing plan were generally grouped into meaningful statements or paragraphs. In the next chapter the recommendations, research challenges, future research areas and the strategic marketing plan will be formulated.

CHAPTER 7

THE FORMULATION OF A STRATEGIC TOURISM MARKETING PLAN FOR MANGAUNG

7.1 INTRODUCTION

In this chapter the researcher addresses the aims and objectives of the study as stated in chapter one. The main research aim is to develop a strategic tourism marketing plan for the Mangaung Tourism area. This chapter embraces findings from the literature review and the empirical investigations in order to interpret data. It is also intends to determine if there is a correlation between the literature review and the empirical investigation findings. The overall aim is to reinforce the arguments from the literature by means of findings from the empirical investigations.

The strengths, weaknesses, opportunities and threats have been identified in chapter 6 (see paragraphs 6.3.2, 6.3.3, 6.3.4 and 6.3.5). The critical success factors (see paragraph 6.3.1) and the competitor profile were also addressed in chapter 6 (see paragraphs 6.3.6, 6.3.7 and 6.3.8). The aforementioned will form the basis for the formulation of a strategic tourism marketing plan for the Mangaung Tourism area.

7.2 PRIORITIES, GOALS AND OBJECTIVES

The following priorities (which need to be converted into long- and short-term objectives) have been identified for Mangaung.

7.2.1 Priority 1   Preparation for the 2010 Soccer World Cup (refer to Table 6.23 in chapter 6).

Long-term objective To prepare stakeholders to take advantage of and rely only on the 2010 Soccer World Cup in South Africa.

Short-term objective	The compilation of a 2010 marketing strategy in conjunction with stakeholders. The researcher recommends that this plan should be completed by 31 June 2009 and the General Manager at the Mangaung Tourism area is responsible for this objective.
7.2.2 Priority 2	The development of Mangaung as a conference destination (refer to table 6.23 in chapter 6).
Long-term objective	To have Mangaung positioned as a conference destination of choice in central South Africa.
Short-term objective	To do market research on the Mangaung tourist markets. The researcher recommends that this objective should be completed by 15 March 2009 and the General Manager at the Mangaung Tourism area or his delegate will be responsible for this objective.
7.2.3 Priority 3	Increase the number of festivals to be hosted in the Mangaung Tourism area (refer to table 6.23 in chapter 6).
Long-term objective	To have sufficient events in the Mangaung Tourism area.
Short-term objective	To identify two new events that are not available in the Mangaung Tourism area. The researcher recommends that this objective should be completed by 31 June 2009 and the General Manager at the Mangaung Tourism area or his delegate will be responsible for this objective.

7.2.4 Priority 4   Upgradement of the public roads in the Mangaung
Tourism area.

Long-term objective   To improve the roads in Mangaung Tourism area
(refer to table 6.23 in chapter 6).

Short term objective   To initiate roads building and rehabilitation
collaboration together with the Provincial
Department of Transport and National Department
of Public Works. The researcher recommends that
this objective should be completed by 20
December 2009 and the General Manager at the
Mangaung Tourism area or his delegate will be
responsible for this objective.

7.2.5 Priority 5   Upgrade the attractions in the area (refer to
table 6.23 in chapter 6).

Long-term objective   To improve tourist attractions in the Mangaung
Tourism area.

Short-term objective   To undertake research amongst current and
potential target markets regarding their product
needs for the future. The researcher recommends
that this objective should be completed by 15
December 2009 and the General Manager at the
Mangaung Tourism area or his delegate will be
responsible for this objective.

7.2.6 Priority 6   The Mangaung Tourism area should serve as
an effective marketing agency for the area. (Refer
to table 6.1 in chapter 6).

Long-term objective   To increase marketing actions in order to build market share in all identified target markets.

Short-term objective 1   The compilation of a strategic marketing plan for the Mangaung Tourism area. The researcher recommends that the plan should be completed by 31 December 2009 and the General Manager at the Mangaung Tourism area is responsible for this objective.

Short-term objective 2   The formulation of a strategy for the possible inclusion of the Mangaung Tourism area as stop-over destination in the itineraries of national tour operators from Johannesburg, Durban and Cape Town. The researcher recommends that this strategy should be completed by 31 July 2009 and the General Manager at the Mangaung Tourism area or his delegate will be responsible for this objective.

Short-term objective 3   The formulation of a strategy on the possible inclusion of petrol stations to serve as after-hours tourism information centres in the area. The researcher recommends that this strategy should be completed by 30 June 2009 and the General Manager at the Mangaung Tourism area or his delegate will be responsible for this objective.

7.2.7 Priority 7   Funding (refer to table 6.1 in chapter 6).

Long-term objective   To increase the funding basis of Mangaung Tourism.

Short-term objective 1	The formulation of a strategy to increase membership of the Mangaung Tourism area. The researcher recommends that this strategy should be completed by 15 August 2009 and the General Manager at the Mangaung Tourism area or his delegate will be responsible for this objective.
Short-term objectives 2	To solicit funds from Mangaung municipality. The researcher recommends that this objective should be completed by 15 October 2009 and the General Manager or his delegate will be responsible for this objective.
7.2.8 Priority 8	The establishment of tourism education for local communities (refer to table 6.1 in chapter 6).
Long-term objective	To introduce tourism education in the various levels of local community.
Short-term objective	The formulation of a strategy to improve on current levels of tourism education between the various levels of government in the region. The researcher recommends that this objective should be completed by 1 November 2009 and the General Manager at the Mangaung Tourism area or his delegate will be responsible for this objective.

7.3 MISSION STATEMENT

The researcher recommends the following mission statement for the Mangaung Tourism area (refer to table 6.2 in chapter 6).

To position the Mangaung Tourism area as a prime conference and events destination in the Free State, offering excellent services and the best hospitality, in conjunction with the stakeholders.

7.4 THE TARGET MARKETS

The following target markets as indicated in table 7.1 are recommended for the Mangaung Tourism area (refer to table 6.3 in chapter 6):

Table 7.1 Recommended target markets for Mangaung Tourism

Market segment	Geographical area
Business tourism	Gauteng, Lesotho and Free State
VFR	South Africa
Sport Tourism	South Africa
Local Leisure	Free State
Passing-through traffic	South Africa
International	China, Belgium, Europe, Lesotho a Netherlands

The motivations for recommending the specific markets in table 7.1 are:

- business tourism market segments. The business tourism market is ideal for the planned Mangaung International Convention centre;
- sport tourism market segments. The Mangaung Tourism area has good sports facilities like Vodacom Park and Goodyear Park;
- local leisure. Mangaung has a large entertainment and leisure appeal to the Free State market;
- passing-through traffic. The central location of the Mangaung Tourism area makes Mangaung ideal for the stop-over market segment; and
- international market. The proximity of international borders like Lesotho makes Mangaung ideally located to attract international tourists. Tourists from the Netherlands, Belgium, China and Europe are international tourists who are already visiting South Africa. The idea is to include the Free State in future itineraries.

In addition, in table 7.2 the researcher recommends the following markets for future targeting:

Table 7.2 Mangaung future target markets

Market segment	Geographical area
Pensioners	Free State
Medical tourism	South Africa
Educational tourism	South Africa
Weekend break-aways	Free State

The Mangaung Tourism area can further target the pensioners, medical tourism, educational tourism and weekend break-away markets to enhance their scope of target markets as indicated in table 6.3 in chapter 6.

7.5 POSITIONING

The researcher recommends the following position for the Mangaung Tourism area (refer to table 6.22 in chapter 6):

To position the Free State as an events destination in central South Africa where good value for money, excellent service and hospitality will be provided at all times.

7.6 MARKETING MIX

The following discussion will be based on the recommendations under the marketing mix factors.

7.6.1 Product mix

Recommendations with regard to the product mix are stipulated in the following discussion.

7.6.1.1 Differentiation of the Mangaung Tourism brand name from the competitors (refer to table 6.4 in chapter 6).

According to George (2004:192), branding is assigning a colour, term, sign, name or a combination of these mentioned items to identify a product in a manner that distinguishes it from the competitor. Branding should be based on achieving product differentiation from the competitor. A brand name should be easily verbalised and encourage repeat business. Branding helps in terms of perceptions of quality and consistency of standards.

The Mangaung Tourism area should develop a suitable tourism brand for the area. Letter heads, promotional materials and communication tools should be used to communicate the brand name to selected target markets. The researcher recommends **Mangaung Tourism** as the relevant brand name. Mangaung is a Sesotho name for Cheetahs derived from the vernacular language spoken by the majority of Mangaung inhabitants. The name represents Cheetahs that used to roam the fields of the Mangaung area.

7.6.1.2 Standard of services offered in the Mangaung Tourism area (refer to table 6.6 in chapter 6)

The researcher recommends that a customer satisfaction questionnaire be implemented for the Mangaung Tourism area that will identify the real standard of services. A customer satisfaction questionnaire should be made available at points-of-sale like the airport, accommodation establishments, tourism products such as museums and shopping centres.

The questionnaire will be developed to assess customer satisfaction during the consumption phase (when the customer is using the Mangaung Tourism area's products) so as to improve service delivery and standards. (Refer to Annexure F for a sample of the customer satisfaction questionnaire).

The researcher recommends that, to have good service standards, the Mangaung Tourism area should take advantage of the pre-sale phase, transaction phase and post sale phase of the product service.

a) Pre-sale phase

This is the period in which the customer has not yet arrived at the tourism product. The Mangaung Tourism area can consider using the following promotional tools effectively to win tourists for Mangaung:

- brochures. The Mangaung Tourism area should make sure that brochures contain usable information. Since at this phase customers have many questions, brochures must contain the contact details for customers to be able to contact the information desk;
- internet. The Mangaung Tourism area website should be upgraded in such a way that customers can have an immediate two-way communication. This facility will help eliminate uncertainty on the side of the customer about deciding to make Mangaung a tourist destination of choice;
- magazines. The Mangaung Tourism area can use in-flight magazines to give information about tourist products in Mangaung. This will allow customers to make up their minds as to what tourist activities to pursue in Mangaung; and
- newspapers. The Mangaung Tourism area can use newspapers' news columns with the idea of popularising Mangaung attractions. These will help to spread information to prospective customers about Mangaung.

b) Transaction phase

This is the period in which the customer has arrived at the tourist product. In this phase the exchange transactions are taking place between the firm and the customer. The following marketing strategy can be useful in this phase should the Mangaung Tourism area wish to retain the customers:

- employee training. The Mangaung Tourism area should organise workshops for the stakeholders' employees. The aim of the workshop will be to train the stakeholders on quality service delivery and customer care;

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- employee rewarding. The Mangaung Tourism area should have in place a memorandum of understanding with the stakeholders. The idea of the memorandum will be to encourage the Mangaung Tourism area's product owners to reward their staff for good service delivery. When the staff is satisfied with the rewards, they are likely to deliver better services to the customer; and
- management by moving around. The Mangaung Tourism area Board members should visit the product owner's premises from time to time with the idea of analyzing service delivery to the customers and also to evaluate the customer satisfaction.

c) Post-sale services

This is the period in which the customer has left the tourism product. In this phase it is critical for the organisation to evaluate the customer experience of the services. It is also imperative for the organisation to build relationships with the customers. The following marketing strategy could be useful for the Mangaung Tourism area to implement in this phase:

- questionnaires. The Mangaung Tourism area should encourage individual product owners to regularly give the customer satisfaction questionnaires at the post sale phase. These will assist the Mangaung Tourism area to have a first hand feedback on the customers' experience of service delivery;
- postcards. The Mangaung Tourism area should send postcards to customers on special days like Fathers' day. On the postcard information about the coming events in the Mangaung Tourism area should be advertised; and
- newsletters. The Mangaung Tourism area should send customers monthly or quarterly newsletters about tourism developments in the Mangaung Tourism area. The newsletter should contain advertisements of tourism products like accommodation specials in Mangaung.

The strategies that are further discussed as part of promotion (see paragraph 7.6.5) will play a major role in keeping the customer informed about service in Mangaung during the pre-sale and post-sale phases.

7.6.2 Pricing strategy that should be implemented in the Mangaung Tourism area (refer to table 6.5 in chapter 6)

According to the majority of the respondents, the value-based pricing method will be the most appropriate for the Mangaung Tourism area. The tourism products in the Mangaung Tourism area are not all owned by Mangaung Tourism and this makes it difficult to formulate common prices. The following recommendations may be used by Mangaung to determine prices for individual product owners:

- the Mangaung Tourism area should collect information about prices of accommodation, restaurants, entertainment and attractions in competing areas. The collected information should be updated from time to time and be made available to all stakeholders. It will assist stakeholders to identify the dangers of overpricing;
- the Mangaung Tourism area should encourage stakeholders to offer special prices as part of a package to tour groups or delegates to conferences; and
- the Mangaung Tourism area should host workshops with stakeholders aimed at developing their skills to determine prices.

Table 7.3 demonstrates the correct price determination for guesthouses.

Table 7.3 Correct pricing determination

Stride 1	Determine what tourists are prepared to pay per night for a double room, for example R 400. This information may be collected through research in the form of satisfaction questionnaires that clients are required to complete before departure.
Stride 2	Determine the costs per double room per night at the guesthouse. For example, total monthly expenses of the guesthouse amount to R 15 000. Divide by 30 to determine the cost per day = R500. Divide by the number of double rooms (for example 3) to determine costs per double room per day = R 167.
Stride 3	Determine the average price at competing guesthouses, for example R 430 per night.
Stride 4	Make use of the concept of psychological pricing, in other words rather determine a price of R 390 than R 400 per night. It creates a favourable perception in the minds of customers.
Stride 5	Determine the appropriate price for the double room for the guesthouse. In this example a good price to ask may be R 389. It is marginally lower than what customers are prepared to pay as well as lower than prices at competing institutions. In this example, a profit margin of 132% will still be materialized. Be aware of the risk of charging too low prices since it may create a perception of inferior quality.

Adapted from Van Lill (2006:91)

7.6.3 Distribution of the Mangaung Tourism area's products (refer to table 6.7 in Chapter 6)

The majority of the respondents indicated that the electronic media should be extensively used to distribute the Mangaung Tourism area's products.

However, Mangaung Tourism may adopt these recommendations:

7.6.3.1 Distribution of marketing materials

All marketing materials, like brochures, should be placed conveniently to all selected potential and current markets. Marketing materials may be made available at the following distribution points:

- all offices of SA Tourism (domestic and international);
- tourism information offices in the Free State;
- tourism information offices at selected metropolitan areas like Johannesburg, Durban and Cape Town – especially to target international tourists who are already in South Africa;
- the offices of Mangaung Municipality;
- all product owners in the region (accommodation establishments included);
- offices of publicity associations in the province (where applicable); and
- identified businesses, police stations and fuel stations (also for after-hours purposes).

7.6.3.2 Actions for using intermediaries

The Mangaung Tourism area may consider the following actions in terms of using intermediaries:

- the Mangaung Tourism area should take advantage of national and international tour operators' itineraries for possible inclusion of the Mangaung Tourism area as a stop-over destination from Johannesburg, Durban and Cape Town. Packages (including accommodation, restaurants, entertainment and attractions) may be sold to the national tour operators;
- the building of good relations with travel agents globally, in order to persuade them to sell the Mangaung Tourism area's products;

- invest capital, on a commission basis, for tour operators in selected international countries to include Mangaung in itineraries;
- encourage local tour operators to undertake tours within the Mangaung Tourism area by giving incentives to local tourists. The incentives can be in the form of rewards to repeat customers, such as discounts; and
- engage national conference organizers to distribute information on the events products in Mangaung to the current and potential target markets.

The following requirements may be implemented in terms of using intermediaries in future:

- minimum requirements of the organisation and its customers in terms of quality should determine which intermediaries the Mangaung Tourism should use;
- use of services should depend on the prices the intermediaries charge. If the prices are too high, alternatives should be considered. However, exceptions can be made where there is a specific need from a certain group of customers; and
- the Mangaung Tourism area should ensure good relations with intermediaries. It forms the cornerstone of successful business relationships.

7.6.4 The promotion of the Mangaung Tourism area's products

There are four promotional tools on which the Mangaung Tourism area can base their promotion efforts, namely: advertising, sales promotion, personal selling and publicity.

7.6.4.1 Advertising (refer to table 6.9 in chapter 6)

- billboards and brochures are two of the most effective tools that can be used by the Mangaung Tourism area.

However, the researcher would like to make the following recommendations within the framework of budget implications:

- upgrading of the Mangaung Tourism area website. The Mangaung Tourism area needs to upgrade the current website by updating the database and information about attractions and accommodation in Mangaung;
- e-mail marketing (also SMS). The Mangaung Tourism area should also consider using e-mails to promote the Mangaung Tourism area's attractions to the prospective and existing target markets;
- radio advertisements. Radio advertising is a relatively expensive method of advertising. Therefore, Mangaung should consider co-operation with Motheo District Municipality and the Free State Tourism Authority regarding a joint radio advertisement;
- magazines and Newspapers. In terms of newspapers, the option of advertising to the local residents (for weekend-breakaways, the local leisure market and the pensioners' market) in the Volksblad and/or Ons Stad/Bloemnuus/Express should be considered;
- brochures. Brochures should be loaded with information like shopping facilities, medical facilities and educational facilities; and
- outdoor advertisements. Road side signage is one of the best ways to give directions. Signage should be allocated on the roads of the Mangaung Tourism area to indicate the direction of tourist products, for example next to the road leading to Bloemfontein city from the airport.

7.6.4.2 Personal selling (refer to table 6.8 in chapter 6)

The researcher recommends exhibitions like the annual Tourism Indaba in Durban as a good way of selling the Mangaung Tourism area's products.

The researcher would like to add the following recommendations:

- personal visits to retirement villages in the Free State in order to penetrate the pensioners' market;
- personal visits to selected sport clubs/associations for the purpose of attracting sports events;
- personal visits to selected schools for the purpose of attracting sports events;
- personal visits to selected businesses for the purpose of attracting business events and to market the region in general to business communities in the selected target markets; and
- personal visits to selected conference organizers for the purpose of attracting conferences.

7.6.4.3 Sales promotion (refer to table 6.10 in chapter 6)

Radio jingles and competitions will be good options to consider in order to sell the Mangaung Tourism area's products. However, the following tools are recommended:

- exhibitions at trade shows. The Mangaung Tourism area's officials should visit trade shows like the annual Tourism Indaba in Durban;
- exhibitions at selected shopping centres (e.g. Mimosa Mall and the Waterfront) to create a bigger tourism awareness amongst the local population;
- the possible introduction of a group discount scheme in conjunction with private product owners may be investigated. For example Protea Hotel can book a group of Cheetahs' rugby team supporters with a 20 percent discount during the Currie Cup season;
- awareness campaigns in conjunction with fuel stations alongside the N1 during peak seasons;
- the development of a video to show during exhibitions or in airplanes; and
- the distribution of promotional materials like pens, rulers, ties, ashtrays, calendars to selected target markets like business tourists.

- **7.6.4.4 Publicity** (refer to table 6.11 in chapter 6)

The Mangaung Tourism area should use media releases, press statements and print and electronic media as the preferred method of publicity.

Other recommended options include the following:

- media tours;
- press releases; and
- distribution of a monthly newsletter via the website or e-mail.

7.7 AREAS OF FURTHER RESEARCH

The following topics may be of interest to researchers for future studies in terms of creating developmental knowledge to the benefit of the Mangaung Tourism area:

- the understanding of quality service delivery in the Mangaung Tourism area;
- the impact of politically-driven leadership as opposed to business-driven leadership in the Mangaung Tourism area; and
- the impact of events on the host community in the case of the Mangaung Tourism area.

7.8 CONCLUSION

This chapter was based on developing a strategic marketing plan for the Mangaung Tourism area. The implementation of this plan will assist in giving the Mangaung Tourism area a structured approach towards tourism marketing in the future.

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ANNEXURE A

ANNEXURE 1

Summary of Accommodation database

NAME	STREET	SUBURB	TOWN	PADDRESS6	PTOWN	PCODE	LCODE
STEWARD GUESTHOUSE	85 ALIWAL STREET	WAVERLEY	BLOEMFONTEIN				051
A3 GUEST HOUSE	58 CURIE AVENUE	HOSPITAL PARK	BLOEMFONTEIN	58 CURIE AVENUE	BLOEMFONTEIN	9300	051
ABODE GARDEN UNIT	24 TALJAART STREET	FICHARDTPARK	BLOEMFONTEIN	P.O. BOX 202397	WILLOWS	9301	051
AFRAAL GARDEN HOUSE	80 WAVERLEY DRIVE	WAVERLEY	BLOEMFONTEIN	P.O. BOX 28444	LANGENHOVEN PARK	9330	051
ALE INN	1 JOHN VAN DER RIET STREET	LANGENHOVEN PARK	BLOEMFONTEIN	P.O. BOX 28444	LANGENHOVEN PARK	9330	051
ALHENTA GUEST HOUSE	89 HENRY STREET	WESTDENE	BLOEMFONTEIN	89 HENRY STREET	BLOEMFONTEIN	9300	051
ALOE RIDGE B&B	5 REYTON RIDGE	DAN PIENAAR	BLOEMFONTEIN	P.O. BOX 227793	BLOEMFONTEIN	9321	051
ALTHA HATTING OVERNIGHT	92 PAUL ROUX STREET	DAN PIENAAR	BLOEMFONTEIN				051
ALVARIA GUEST HOUSE	63 BENADE AVENUE	FICHARDT PARK	BLOEMFONTEIN	63 BENADE AVENUE	BLOEMFONTEIN	9301	051
AMANZIMTOTI	4 INNES AVENUE	WAVERLEY	BLOEMFONTEIN	4 INNES AVENUE	WAVERLEY	9301	051
ANNATJIE GUEST HOUSE	PLOT NO. 2	MASELSPOORT	BLOEMFONTEIN	POSTNET SUITE 271, PRIVATE BAGX 01	BLOEMFONTEIN	9301	051
ANRI GUEST HOUSE	19 HUDSON DRIVE	FICHARDT PARK	BLOEMFONTEIN	19 HUDSON DRIVE	BLOEMFONTEIN	9301	051
ANSIE'S GUEST ROOM	15 JOHN CHARD STREET	BRANDWAG	BLOEMFONTEIN				051
ANSU GUEST HOUSE	45 BOERSMO STREET	UNIVERSITAS	BLOEMFONTEIN	P.O. BOX 12012	BRANDHOF	9324	051
ARCHIE'S GUESTHOUSE	80 WAVERLEY DRIVE	WAVERLEY	BLOEMFONTEIN			9307	051
ARTE INN	28 BLOCK STREET	UNIVERSITAS	BLOEMFONTEIN	28 BLOCK STREET	BLOEMFONTEIN		051
AT INN	28 KELLNER STREET	WESTDENE	BLOEMFONTEIN				051
AT HOME GUEST HOUSE	19 KOOS VAN DER WALT	UNIVERSITAS	BLOEMFONTEIN	P.O. BOX 12411	BRANDHOF	9324	051
ATLANTIS GUEST HOUSE	33 JACOBS STREET	UNIVERSITAS	BLOEMFONTEIN	P.O. BOX 12411	BRANDHOF	9301	051
AYJAY GUEST HOUSE	51 ELAND STREET	FAUNA	BLOEMFONTEIN				051
B @ HOME	32 CAPTAIN PROCTOR STREET	BRANDWAG	BLOEMFONTEIN	P.O. BOX 11163	BLOEMFONTEIN	9321	051
B&B 63 & 63	53 ANDRIES PRETORIUS STREET	HILTON	BLOEMFONTEIN	P.O. BOX 22779	EXTON ROAD	9313	051
BAYSWATER LODGE	65 WILCOCKS ROAD	BAYSWATER	BLOEMFONTEIN				051
BEDROCK GUEST ROOMS	93 NARMANDI AVENUE	BAYSWATER	BLOEMFONTEIN				051
BELVEDERE GUEST HOUSE	151 WAYVERLEY ROAD	DAN PIENAAR	BLOEMFONTEIN	P.O. BOX 28905	DAN-HOF	289005	051
BLOEMSPA AND CONFERENCE CENTRE	ULYVALE ROAD	RAYTON	BLOEMFONTEIN		HEUWELSIG	9332	051
BLOEMFONTEIN CARAVAN PARK	2 QUAGGA STREET	QUAGGASFONTEIN	BLOEMFONTEIN	P.O. BOX 43462	BLOEMFONTEIN	9301	051
BLOEMFONTEIN INN	17 EDISON STREET	HOSPITAL PARK	BLOEMFONTEIN	P.O. BOX 22146	BLOEMFONTEIN	9301	051
BLOEMSTANTIA GUEST HOUSE	62 EDDIE DE BEER STREET	DAN PIENAAR	BLOEMFONTEIN	P.O. BOX 29879	DAN-HOF	9310	051
BLUEBERRY HILL(HOUSE)	65 PAUL ROUX STREET	DAN PIENAAR	BLOEMFONTEIN	P.O. BOX 20571	DAN-HOF	9310	051
BOLIVIAN GUEST HOUSE	16 GOYNOR STREET	WESTDENE	BLOEMFONTEIN	P.O. BOX 3552	BLOEMFONTEIN	9301	051
BRANDWAG FLAT	3 DUPANT STREET	BRANDWAG	BLOEMFONTEIN	18 COYNOR STREET	BLOEMFONTEIN	9301	051
C.M JOOSTE HOUSE, ORANJE GIRL s" SCHOOL	7 HARRYSMITH	WAVERLEY	BLOEMFONTEIN	PRIVATE BAG X5	CLOCOLAN	9735	051
CAMELIA GUEST HOUSE	1 HENDRIK KOTZE CRESCENT	UNIVERSITAS RIDGE	BLOEMFONTEIN	BOX 18046 GASEHJUNELO	CLOCOLAN	9321	051
CANADA HOUSE	19 WAVERLEY ROAD	WAVERLEY	BLOEMFONTEIN				051
CARMEN GARDEN UNIT	18 GUSTAV CRESENT	FICHARDT PARK	BLOEMFONTEIN				051
CEDARWOOD GUEST UNIT	2 FALLOPIUS STREET	WAVERLEY	BLOEMFONTEIN				051
CHAMELEON GUEST HOUSE	NIEL VAN LOGGERENBERG CRESENT AND JAN VAN RHYN	UNIVERSITAS RIDGE	BLOEMFONTEIN	4T NIEL VAN LOGGERENBERG CRESENT	UNIVERSITAS	9301	051
CHERRY TREE COTTAGE	12A PETER CRESCENT	UNIVERSITAS RIDGE	BLOEMFONTEIN				051
CITY LODGE	C/O NELSON MANDELA AND PARFITT STREET	WAVERLEY	BLOEMFONTEIN	P.O. BOX 13272	NOORDSTAD	9305	051
COLLEGE LODGE	16-18 STABELBERG STREET	BRANDWAG	BLOEMFONTEIN				051
CORPOLO LODGE & CONFERENCING	3 LOVELEI BLDG, KING EDWARD	WILLOWS	BLOEMFONTEIN				051
COUNTRY INN GUEST HOUSE	243 PRESIDENT PAUL KRUGER AVENUE	UNIVERSITAS	BLOEMFONTEIN				051
DAN PIENAAR GUEST HOUSE	80 GENERAL HERTZHOG HOUSE	DAN PIENAAR	BLOEMFONTEIN				051
DE KAT GUEST HOUSE	25 MILNERWEG	WAVERLEY	BLOEMFONTEIN	25 MILNER ROAD	BLOEMFONTEIN	9301	051
DE NEST GUESTROOMS	2 FALLOPIUS STREET	WAVERLEY	BLOEMFONTEIN	2 FALLOPIUS STREET	HOSPITAL PARK	9301	051
DE OUDE KRAAL COUNTRY LODGE	N1 SOUTH (35KM)	OFFRAMP 153	BLOEMFONTEIN	P.O. BOX 3245	FAUNASIG	9325	051
DERSLEY'S DEN	3 DERSLEY'S DEN	BAYSWATER	BLOEMFONTEIN		NOORDSTAD	9305	051
DIAS GUEST HOUSE	14 DIAS CRESENT	DAN PIENAAR	BLOEMFONTEIN		DANPIENAR	9310	051
DIE PALMS	41 BARRY RITCHIER AND SANNASPOS	GENERAL DE WET	BLOEMFONTEIN	P.O. BOX 26694	DANPIENAR	9310	051
DIE VKOOLTJIE	WEITZ STREET	UNIVERSITAS	BLOEMFONTEIN	P.O. BOX 34468	FAUNASIG	9325	051
DORPHUIS GUEST HOUSE	14 ROTH AVENUE	WILLOWS	BLOEMFONTEIN	P.O. BOX 26942	LANGENHOVENPARK	9330	051
DU TOITS GUESTHOUSE	10 STEGMAN STREET	UNIVERSITAS RIDGE	BLOEMFONTEIN	P.O. BOX 6028	BLOEMFONTEIN	9300	051
DUINERUS B&B	8 GEORGE DU TOIT STREET	BRANDWAG	BLOEMFONTEIN			9301	051
DUTTON PLACE	4 DUTTON CRESENT	HILTON	BLOEMFONTEIN				051
ELLENBOY GUEST HOUSE	114 ANDRIES PRETORIUS STREET	BLOEMDAL - OOS	BLOEMFONTEIN	P.O. BOX 12193	BLOEMFONTEIN	9301	051
ELUZAI GUEST HOUSE & RIDING SCHOOL	1 DENNELAAN	FERREIRA	BLOEMFONTEIN				051
EMTONJENI COUNTRY LODGE	16 GUSTAV CRESENT	PARKWEST	BLOEMFONTEIN	P.O. BOX 31912	FICHARDT PARK	9317	051
EUNICE HIGH SCHOOL	1 TED DEANE STREET	HILTON	BLOEMFONTEIN	P.O. BOX 34625	FAUNASIG	9326	051
FAKKEL CARAVAN PARK	3 JOCK MEIRING STREET AND SIR GEORGE GREY	PARKWEST	BLOEMFONTEIN	P.O.BOX 295	BLOEMFONTEIN	9300	051
FARMHOUSE GUEST HOUSE	212 ANDRIES PRETORIUS STREET	HILTON	BLOEMFONTEIN				051
FLO-BEN GUEST HOUSE	222 PAUL KRUGER AVENUE	UNIVERSITAS	BLOEMFONTEIN	P.O. BOX 13466	NOORDSTAD	9302	051
FLORENTIA GUEST HOUSE	3 PAUL ROUX STREET	DAN PIENAAR	BLOEMFONTEIN	20 LOUIS BOTHA STREET	NOORDSTAD	9302	051
FRYMELKE GUEST COTTAGE	2C LOUIS BOTHA STREET	WAVERLEY	BLOEMFONTEIN	P.O. BOX 31172	FICHARDT PARK	9317	051
GAETSHO GUEST HOUSE	388 STATION ROAD	RATHOU VILLAGE	THABA NCHU	P.O. BOX 332	THABA NCHU	9760	051

NAME	STREET	SUBURB	TOWN	PADDRESS	PTOWN	PCODE	LCODE	LNUMBER	CCODE	CNUMBER	FCODE	FNUMBER
GLEN COUNTRY LODGE	NO.4 SMALL HOLDINGS	GLEN EXTENSION	BLOEMFONTEIN	P. O. BOX 12193	BRANDWAG	9324	051	2502859	082	3303709	051	6612042
GOOSE DOWN GUEST HOUSE	SPESERY AVENUE	CUAGGASFONTEIN	BLOEMFONTEIN	P. O. BOX 11671	UNIVERSITAS	9301	051	5233846	082	3370643	051	4362650
GOOSE-N-HOP	102 WYNAND MOUTON STREET	UNIVERSITAS RIDGE	BLOEMFONTEIN				051	4362650	082	9225515	051	4170663
GRANT'S HILL SELF CATERING COTTAGE	61 PAUL ROUX STREET	DAN PIENAAR	BLOEMFONTEIN	P.O. BOX 12300	BRANDHOF	3324	051	4440079	084	5010387	051	4440079
GUTE NACHT GUEST HOUSE	5 LIEBEGANG STREET	BRANDWAG	BLOEMFONTEIN	P.O. BOX 8422	BLOEMFONTEIN	9200	051	5233557	082	6823587	051	5233742
HALEY HERITAGE HOTEL	1 SPERGRY AVENUE	QUAGGASFONTEIN	BLOEMFONTEIN	P.O. BOX 28590	DANHOF	9301	051	4930600	092	5376533	051	4930699
HALDON HOUSE	C/O MARKGRAAF AND CHARLES STREET	CBD	BLOEMFONTEIN	P.O. BOX 32087	BLOEMFONTEIN	9301	051	5227632	082	6916275	051	4308525
HANNELIE DORNAG	3 SCHEEHAGE STREET	FICHARDT PARK	BLOEMFONTEIN	P. O. BOX 32087	BLOEMFONTEIN	9301	051	5227632	082	3288728	051	4032516
HAYWARDS GUESTHOUSE	34 FORSYTH STREET	UNIVERSITAS	BLOEMFONTEIN	34 FORSYTH STREET	BLOEMFONTEIN	9300	051	5223365	082	4169011	051	4354782
HEIDI'S PLACE	48 GUSTAV CRESENT	FICHARDT PARK	BLOEMFONTEIN	48 GUSTAV STINDEL	BLOEMFONTEIN	9301	051	5227057	082	9299750	051	5222067
HEDNON GUEST HOUSE	6 ANDRIES PRETORIUS STREET	CBD	BLOEMFONTEIN	6 ANDRIES PRETORIUS STREET	BLOEMFONTEIN	9301					051	4305735
HIDE PLACE LODGE	13 GENERAL DAN PIENAAR STREET	BRANDWAG	BLOEMFONTEIN	P. O. BOX 217	BLOEMFONTEIN	9300	051	4362692	051	3003709	051	4382050
HILLSIDE BED AND BREAKFAST	4 FISCHER STREET	WAVERLEY	BLOEMFONTEIN				051	4386569	051	2090266	051	4352692
HOBBIT BOUTIQUE HOTEL	19 PRESIDENT STEYN AVENUE	WESTDENE	BLOEMFONTEIN	P.O. BOX 20207	BLOEMFONTEIN	9310	051	4301721	072	5152608	051	4361712
HOME FROM HOME	13 CHRIS BARNARD STREET	DAN PIENAAR	BLOEMFONTEIN	P.O. BOX 20207	DANHOF	9330	051	2058523	083	2824189	051	9292991
HOTEL FORMULA 1	204 NELSON MANDELA DRIVE	LANGENHOVEN PARK	BLOEMFONTEIN	P.O. BOX 39592	LANGENHOVEN PARK	9330	051	4477603	082	4562049	051	4477746
HOTEL LUXOR AND HIGHWAY LODGE	KOKLAAN	BRANDWAG	BLOEMFONTEIN	P.O. BOX 12226	RENOSTERSPRUIT	9324	051	4417819	083	3279330	051	4417803
HOTEL NAMELO	14 ROTH AVENUE	FERREIRA	BLOEMFONTEIN	P.O. BOX 10091	LANGENHOVEN PARK	9309	051	4304523	051	3279330	051	4450925
HTS LOUIS BOTHA	VICTORIAWEG	WILLOWS	BLOEMFONTEIN	P.O. BOX 26159	BLOEMFONTEIN	9500	051	4308525	082	6823587	051	4308525
HUDSON DORNAG	26 HUDSON STREET	WILLOWS	BLOEMFONTEIN	P.O. BOX 31731	BLOEMFONTEIN	9320	051	5222154	051	7155921	051	5222154
HUGENROOT GUEST HOUSE	19 HUGENOOT STREET	FICHARDT PARK	BLOEMFONTEIN				051	4300167	092	5956173	051	4300167
HYDRO GUESTHOUSE	115 KELLNER STREET	WILLOWS	BLOEMFONTEIN	P. O. BOX 8808	BLOEMFONTEIN	9300	051	4460323	051	3288728	051	4475743
ILANGA ESTATE	LUKAS STEYN STREET	WESTDENE	BLOEMFONTEIN	P.O. BOX 8034	HEILIGENLIG	9312	051	4308450	083	3030131	051	4308259
INDABA LODGE	53 VALLOMBROSA AVENUE	HEILIGENLIG	BLOEMFONTEIN	P.O. BOX 1642	BLOEMFONTEIN	9300	051	4332516		6916142	051	4417903
INNES GUEST HOUSE	29 INNES AVENUE	RODDEWAL	BLOEMFONTEIN	SUITE 149, PRIVATE BAG X 9	BRANDHOF	9324	051	4331555	083	4590142	051	4331661
JEDUDA GUEST HOUSE	2A INNES AVENUE	WAVERLEY	BLOEMFONTEIN				051	4386569			051	4352695
JMD GUESTROOM	11 AUCAMP STREET	WAVERLEY	BLOEMFONTEIN				051	8224478	082	4120377	051	4362665
KOATLOLOHA GUEST HOUSE	5 WICKIE MOSTERT STREET	FICHARDT PARK	BLOEMFONTEIN	5 WICKIE MOSTERT STREET	BLOEMFONTEIN	9301	051	4462531	091	2090266	051	4462531
KIEPERSOL GUESTHOUSE	70 PAUL ROUX STREET	UNIVERSITAS RIDGE	BLOEMFONTEIN	DANHOF	DANHOF	9330	051	4475465	084	8211614	051	4475398
KLEINE EDEN BED AND BREAKFAST	2 MOFFEI STREET	DAN PIENAAR	BLOEMFONTEIN	P.O. BOX 20207	BRANDHOF	9330	051	4489205	084	1120377	051	4489205
KLOOF LODGE	C/O KLOOF & KIELNER STREET	FICHARDT PARK	BLOEMFONTEIN	P.O. BOX 29097	BLOEMFONTEIN	9301	051	4440078	86	6314607	86	6314607
KOPANO NOKENG COUNTRY LODGE	14 MIDWAY STREET	WESTDENE	BLOEMFONTEIN	41 WEST PHALL	UNIVERSITAS	9321	051	5224928	082	7830582	051	4461155
KORHAAN LODGE	9 BADNE SWART AVENUE	RODDEWAL	BLOEMFONTEIN	P. O. BOX 31272	FICHARDT PARK	9317	051	5222249	083	6610900	051	6904904
KRUGER B&B	83 CASTELYN STREET	BAINSVLEI	BLOEMFONTEIN	P.O. BOX 11562	UNIVERSITAS	9321	051	6227713	88	2770566	88	4359184
KRUGER B&B	159 BENADE AVENUE	FICHARDT PARK	BLOEMFONTEIN	28 VAN ROOYLAAN	BLOEMFONTEIN	9300	051	5224128	051	5905907	051	5224128
LA BOHEME GUEST HOUSE	14 STAPELBERG STREET	FICHARDT PARK	BLOEMFONTEIN	P.O. BOX 31731	BLOEMFONTEIN	9317	051	5227851	051	3279330	051	4511733
LA VIE AND ROSE LODGE	C/O FIRST AVENUE AND HENRY STREET	BRANDWAG	BLOEMFONTEIN	C/O FIRST AVENUE AND HENRY STREET	BLOEMFONTEIN	9301	051	5224289	051	5224289	051	5221951
LAMEWOOD LODGE	75 PRESIDENT REITZ AVENUE	WESTDENE	BLOEMFONTEIN				051	4441098	051	7090003	051	4441098
LALA DENE LODGE	159 HENRY STREET	WESTDENE	BLOEMFONTEIN				051	4475465	051	5211614	051	4475398
LAZY LIZARD GUEST HOUSE	41 WEST PHALL	PARKWEST	BLOEMFONTEIN	P.O. BOX 13998	BLOEMFONTEIN	9301	051	4489205	051	5211614	051	4489205
LE ROIS GUEST ROOM	69 ST ANDREWS STREET	CBD	BLOEMFONTEIN	69 ST ANDREWS STREET	BRANDHOF	9330	051	4440076	051	6314607	051	6314607
LENGAU HOTEL	56 CASTELYN DRIVE	UNIVERSITAS	BLOEMFONTEIN				051	4481155	083	4679057	051	4461155
LIELA BE PLEK	177 PAUL KRUGER STREET	FICHARDT PARK	BLOEMFONTEIN	P.O. BOX 33924	BLOEMFONTEIN	9301	051	4307265	070	1319453	88	4359184
LINGA LONGA GUEST HOUSE	28 VAN ROOY AVENUE	UNIVERSITAS	BLOEMFONTEIN	P. O. BOX 11863	ROCKLANDS	9323	051	4342604	051	7611996	051	4359184
MAGRIELDIE GUEST HOUSE	59 TED DENE STREET	UNIVERSITAS	BLOEMFONTEIN	28 VAN ROOYLAAN	UNIVERSITAS	9321	051	1144340	051	1144340	051	1144340
MARLOW GUEST HOUSE	N1 35KM TO BLOEMFONTEIN	FERREIRA	BLOEMFONTEIN	PRIVATE BAG X20519	FICHARDT PARK	9315	051	4438981	082	5791623	051	4473713
MASELSPOORT RESORT & CONFERENCE CENTRE	1 MAYO STREET		BLOEMFONTEIN	PRIVATE BAG X20519	BLOEMFONTEIN	9300	051	4417040	084	2480064	051	4417005
MAYO LODGE	6 RAY CHAMPION DRIVE	FICHARDT PARK	BLOEMFONTEIN	P.O. BOX 20123	WILLOWS	9320	051	5221098	083	9660200	051	5221098
MEPAH LODGE	3 BRIDGE STREET	RAYTON	BLOEMFONTEIN	POSTNET SUITE 248	BRANDHOF	9324	051	4360606	051	3709133	051	5221098
NALEDI SUN	60 PAUL KRUGER STREET	SELOSESHA- PATLOU	BLOEMFONTEIN	P.O. BOX 131	THABA NCHU	9780	051	8751060	051		051	4395399
NAMIB GUEST HOUSE	3 DIELVILLE ROAD	ARBORETUM	BLOEMFONTEIN	P.O. BOX 131	THABA NCHU	9780	051		051		051	8751060
NAVAL HILL BACKPACKERS	11472 DANIEL LETSATSO STREET	MANGAUNG	BLOEMFONTEIN	P.O. BOX 33924		9301	051	5228448	083	4679057	051	4461155
NORHAYA B&B	11 JACK KNOX	PARKWEST	BLOEMFONTEIN	P.O. BOX 33924	ROCKLANDS	9323	051	4307265	070	1319453	051	5228618
OAK HAVEN	61 PRESIDENT STEYN AVENUE	WESTDENE	BLOEMFONTEIN	P.O. BOX 11863	UNIVERSITAS	9321	051	4342604	051	7611996	051	4359184
OANWOOD LODGE	4 DANNIE VILJOEN STREET	UNIVERSITAS RIDGE	BLOEMFONTEIN			9301	051	4473713	082	5791623	051	4473713
ODESSA GUEST HOUSE	2 VAN TONDER STREET	FICHARDT PARK	BLOEMFONTEIN	P.O. BOX 34118	LANGENHOVEN PARK	9311	051	5228618	083	6085677	051	4462700
OORKING VERBLYF	3 AKNOT STREET		BLOEMFONTEIN	P.O. BOX 26559	FAUNASIG	9301	051	4473213	084		051	4473713
OU PASTORIE GUEST HOUSE	86 OUTENQUA AVENUE	UNIVERSITAS	BLOEMFONTEIN				051	5228618	083	6085677	051	5228618
OOTENQUA ESTATE GUEST HOUSE	12 STAPELBERG STREET	SPITSKOP	BLOEMFONTEIN	P.O. BOX 37909	BRANDHOF	9330	051	4511692	082	4475922	051	4511692
PALM LODGE	21 GELDERLAND STREET	BRANDWAG	BLOEMFONTEIN	12 STAPELBERG STREET	BLOEMFONTEIN	9301	051	4446582	051	4333796	051	4446982
PALM POOL	MASSELSPOORT ROAD	BAYSWATER	BLOEMFONTEIN				051	4333796	051	4333796	051	4446982
PHILLIP BANDROOS RESORT	PLOT 8 REMAINDER				NOORDSTAD		051	4417611	051		051	4417547
PLOVER COTTAGE	2 VAN BLERK AVENUE	GLEN EXTENSION	BLOEMFONTEIN	P.O. BOX 13253		9302	051	6612198	051	2520601	051	6612198
POLLY PARK BIRD PARK AND GUEST HOUSE	202 NELSON MANDELA DRIVE	STIRLING	BLOEMFONTEIN	P.O. BOX 43147	HEILIGENLIG	9322	051	4611113	092	6933375	051	4611113
PREMIER PROTEA HOTEL		BRANDWAG	BLOEMFONTEIN	P.O. BOX 12232	BLOEMFONTEIN	9300	051	4444321		4444321	051	4444322

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PRESIDENT HOTEL	1 UNION AVENUE	CBD	BLOEMFONTEIN	P.O. BOX 1061	BLOEMFONTEIN	9300	051	4301111	051	4304141	051	4301141
PRIDE ROCK GUEST HOUSE	22 PAUL KRUGER AVENUE	UNIVERSITAS	BLOEMFONTEIN	P.O. BOX 11977	UNIVERSITAS	9321	051	4460645	051	4445913	051	4445913
PRIMAVERA GUEST HOUSE	34 A WAVERLEY STREET	WAVERLEY	BLOEMFONTEIN	P.O. BOX 22519	EXTON ROAD	9313	051	4332956	051	3010903		4332956
PROTEA HOTEL LANDMARK LODGE	EAST BURGER STREET	CBD	BLOEMFONTEIN		BLOEMFONTEIN	9300	051	403800				4477102
PROTEA HOTEL THABA NCHU	GROOTHOEK DAM ROAD	GROOTHOEK	BLOEMFONTEIN	PRIVATE BAG X 00114	THABA NCHU	9780	051	8714200				8732161
QUEENS PARK LODGE	41 PARFITT AVENUE	PARKWEST	BLOEMFONTEIN	P.O.BOX 29757	DANHOF	9310	051	4460121	092	4427056	051	4445483
REYNECKE PARK	59 BRENDAB WEG	QUAGGASFONTEIN	BLOEMFONTEIN	P.O. BOX 11669	UNIVERSITAS	9321	051	5223066	092	9091515	051	5223887
RHYTHM & BLUES B&B	10420 ZULU STREET	ROOKLANDS	BLOEMFONTEIN	10420 ZULU STREET	ROOKLANDS	9323	051	3231217	084	3231217	051	4355418
RISE AND SHINE B 'N B	2 D.F. MALHERBE DRIVE	UNIVERSITAS	BLOEMFONTEIN	P.O. BOX 22092	EXTON ROAD	9313	051	5221515			051	5221535
RIVER OF JOY GUEST HOUSE	2590A N1 TO JOHANNESBURG	213 GLEN EXTENSION	BLOEMFONTEIN		LANGENHOVEN PARK		051	4612039	083	4627522		8612039
ROOIEPARK GUEST HOUSE	as CASTELYN AVENUE	FICHARDT PARK	BLOEMFONTEIN	85 CASTELYN STREET	ROOKLANDS	9301	051	5232007	084	6695090	051	5720007
ROSESTAD GUEST HOUSE	31 SCHENIAGE STREET	FICHARDT PARK	BLOEMFONTEIN		BLOEMFONTEIN	9301	051	5256054	082	6456914	051	5720340
SANGIRO LODGE	EILFFES ROAD	NOORDSTAD	BLOEMFONTEIN				051	4334013			051	4334813
SHALOM GUEST HOUSE	22 JACOBS STREET	UNIVERSITAS	BLOEMFONTEIN			9301	051	5222137	072	2285047	051	5222137
SHAWU LODGE	2 D. F. MALHERBE AVENUE	UNIVERSITAS	BLOEMFONTEIN			9301	051	5225731			051	5225731
SILVERDALE GUEST HOUSE	26 MILNER STREET	WAVERLEY	BLOEMFONTEIN			9301	051	4364659	084	4506778	051	4364659
SIR GREY'S GUEST HOUSE	32 JOCK MEIRING STREET	PARKWEST	BLOEMFONTEIN	P.O. BOX 12841	BRANDHOF	9324	051	4445460			051	4445464
SOUTHERN SUN BLOEMFONTEIN	C/O NELSON MANDELA A MELLVILLE DRIVE	BRANDWAG	BLOEMFONTEIN	P.O.BOX 20615	BRANDHOF	9324	051	4441253				
SPITSKOP COTTAGE	19 LANGEBERGH	SPITSKOP	BLOEMFONTEIN	P.O.BOX 37174	LANGENHOVENPARK	9330	051	4511797	082	0209292	051	4476951
ST ANDREW'S SCHOOL	GENERAL DAN PIENAAR DRIVE	WESTDENE	BLOEMFONTEIN	P.O. BOX 12231	BRANDHOF	9324	051	4442639			051	4015703
ST. MICHAEL'S SCHOOL	111 KLERCK DRIVE	BRANDWAG	BLOEMFONTEIN	P.O. BOX 12110	BLOEMFONTEIN	9300	051	4477471			051	4477514
STANVILLE INN	85 ZASTRON STREET	WESTDENE	BLOEMFONTEIN	P.O. BOX 3933	BLOEMFONTEIN	9330	051	4511633	072	2845533	051	4511633
STIRLING COUNTRY LODGE	PLOT 12 VAN BLERK AVENUE	WESTDENE	BLOEMFONTEIN	P.O. BOX 29464	LANGENHOVEN PARK	9301	051	4384871	083	3850903	051	4364870
TAPESTRY GUEST HOUSE	5A MILNER ROAD	WAVERLEY	BLOEMFONTEIN	5A MILNER ROAD	BLOEMFONTEIN	9700	051	6733427	083	3333206	051	6732466
THABA LODGE	GROOTHOEK DAM ROAD	THABA NCHU	THABA NCHU	P.O. BOX 248	THABA NCHU	9780	051	8751405	083	7610061		
THOKONENG GUEST HOUSE	MARIA MORCKA NATURE RESERVE	MARIA MORCKA NATURE RESERVE	BLOEMFONTEIN	44 JAN VAN RIEBECK STREET	BLOEMFONTEIN	9700	051	5226376	082	9602952	051	5226376
THE AFRICAN SANDS GUEST HOUSE	44 JAN VAN RIEBEECK STREET	FICHARDT PARK	BLOEMFONTEIN		BRANDHOF	9324	051	5226005	082	0219100	051	5226305
THE RESTING PLACE	90 BENADE RYLAAN	WESTDENE	BLOEMFONTEIN	P. O. BOX 1028	BLOEMFONTEIN	9301	051	4473389	082	1252923	051	4473317
THE ROSE GUEST HOUSE	49 AND 50 SCHOLTZ STREET	UNIVERSITAS	BLOEMFONTEIN		BLOEMFONTEIN	9301	051	4464141	078	4324326	051	4460614
THE WHITE HOUSE	17 DAPHNE STREET	BAYSWATER	BLOEMFONTEIN			9301	051	4398446		4499027	051	4321973
TOM'S PLACE	35 LUCAS STEYN STREET	HELIMELSIG	BLOEMFONTEIN			9301	051	5226874		4490027	051	5226874
TUFF TOP ESTATE	95 KM ON N1 SOUTH	FAIRNASS	BLOEMFONTEIN	P.O. BOX 30064	BLOEMFONTEIN	9301	051	4356170	072	6384964	051	4366107
TUINHUIS GUEST HOUSE	CORNER WILGE AND STEENBOK STREET	ROODEVAL	BLOEMFONTEIN	P.O. BOX 10572 REBHOBITBHSPRUIT	FAIRNASS	9326	051	9640690	082	2004447		
TUSCANY LODGE	50 GROENEWOLD STREET	UNIVERSITAS	BLOEMFONTEIN	P.O. BOX 12294	BLOEMFONTEIN	9326	051		082	8923119	051	
UITSPAN SELFSORG GESINEID	3 RD AVENUE	WESTDENE	BLOEMFONTEIN	P.O. BOX 12248	BRANDHOF	9324	051	5252451	051	7750195	051	5252442
UNIVARA GUEST HOUSE	153 JAC VAN RHYN	HEIDEDAL	MANGAUNG	153 JAC VAN RYHN	UNIVERSITAS	9301	051	4472389	083	4445000	051	4473317
UNITAS HERBERG	189 BELCHER DRIVE	UNIVERSITAS	BLOEMFONTEIN		BLOEMFONTEIN	9301	051	4464141	083	3018114	051	4460614
UNIVERSITY OF THE FREE STATE	22 LOGEMAN STREET	UNIVERSITAS	BLOEMFONTEIN	22 LOGEMAN STREET	BLOEMFONTEIN	9301	051	4324326	078	1252923	051	4321973
VELS PLACE	NELSON MANDELA DRIVE	NELSON MANDELA DRIVE	BLOEMFONTEIN	P.O.BOX 37174	LANGENHOVENPARK	9330	051	5226874			051	5226874
VICTORIAN LODGE	108 RAUTENBACH STREET	FICHARDT PARK	BLOEMFONTEIN		BLOEMFONTEIN	9301	051	5220191	083	5572337	006	6591164
VILLA FAVORITA	110 KELLNER STREET	WESTDENE	BLOEMFONTEIN	P.O. BOX 28594	BLOEMFONTEIN	9300	051	4479277			051	4479276
WELT GUEST UNITS	21 DUTTON CRESCENT STREET	BRANDWAG	BLOEMFONTEIN	P.O. BOX 12590	BRANDHOF	9324	051	4444010			051	4444010
WEN-DO-LIN TRAVELLER'S REST	7 COETZEE STREET	BRANDWAG	BLOEMFONTEIN	P.O. BOX 31207	BLOEMFONTEIN	9301	051	5227895	083	9833287	051	5227895
WHITES HOUSE	3 RIVERSIDE GLEN	GLEN EXTENSION	BLOEMFONTEIN	P.O. BOX 3181	BLOEMFONTEIN	9300	051	8612062	083	2801704		4460614
WILA'S BED AND BREAKFAST	14 A WHITES ROAD	WAVERLEY	BLOEMFONTEIN	14 A WHITES ROAD	WAVERLEY	9301	051	4365374	083	4146463	051	4365374
WINDMILL LODGE	12 FERREIRA AND RAATH STREET	FICHARDTPARK	BLOEMFONTEIN	12 FERREIRA STREET	FICHARDTPARK	9301	051	5221503	072	300489		
	C/O JAN PIEREWIET AND N1	PELLISIER	BLOEMFONTEIN	P.O. BOX 13232	NOORDSTAD	9301	051	4102000			051	4102410

ANNEXURE 2

Summary of Caravan and Camping database

NAME	STREET	SUBURB	TOWN	PADDRESS	PTOWN	PCODE	LCODE	LNUMBER	CCODE	CNUMBER	FCODE	FNUMBER
RIVER OF JOY GUEST HOUSE	25 KM ON N1 JHB	213 GLEN EXTENSION	GLEN	P. O. BOX 22282, EXTON ROAD	BLOEMFONTEIN	9313	051	8612039	083	4627522	051	8612039
REINHEIM CARAVAN PARK	-	LEONORA NO 3	GLEN	P. O. BOX 43	GLEN	923	082			7781437	051	4332887
TOM'S PLACE	35 KM, N1 SOUTH	-	BLOEMFONTEIN	P.O. BOX 7001	BLOEMFONTEIN	9300	051	5640680			051	5640710
PHILLIP SANDERS RESORT	MASSELSPOORT ROAD	-	-	-	-		051	4417611			051	4417547
NAVAL HILL BACKPACKERS	3 DELVILLE ROAD	ARBORETUM	BLOEMFONTEIN	-	-		051	4307266	078	1316483		
FAKKEL CARAVAN PARK	212 ANDRIES PRETORIOUS STREET	NAVELSIG	BLOEMFONTEIN	-	-		051	5233888	082	5302225		
REYNEKE PARK	58 BRENDAR WEG	QUAGGAFONTEIN	BLOEMFONTEIN	P.O. BOX 11668	UNIVERSITAS	9321	051	5233039	082	9091515	051	5233887
BLOEMFONTEIN CARAVAN PARK	1 KM, N8 TO KIMBERLEY	-	-	P.O. BOX 5221	BLOEMFONTEIN	9300	051					
MASELSPOORT RESORT & CONFERENCE CENTRE	N1 35KM TO BLOEMFONTEIN	-	BLOEMFONTEIN	PRIVATE BAG X20619	BLOEMFONTEIN	9300	051	4417848			051	4417865

ANNEXURE 3

Summary of Day Visitor Facility database

Day visitor facilities

NAME	STREET	SUBURB	TOWN	PADDRESS	PTOWN	PCODE	LCODE	LNUMBER	CCODE	CNUMBER	FCODE	FNUMBER
FREESTATE NATIONAL BOTANICAL GARDEN	RAYTON DRIVE	HEUWELSIG	BLOEMFONTEIN	P.O. BOX 29036	DANHOF	9310	051	4363530	082	5664635	051	4364101
ZOOLOGICAL GARDENS	HORAK STREET	PRESIDENT SWART PARK	BLOEMFONTEIN	P.O. BOX 711	BLOEMFONTEIN	9300	051	4058484	-		051	4057871
MARIA MOROKA NATURE RESERVE (THABA LODGE)	GROOTHOEK DAM	72 KM FROM BLOEMFONTEIN ON THABA NCHU ROAD	THABA NCHU	P.O. BOX 246	THABA NCHU	9780	051	8732427	083	3330328	051	8732466
MZPAH LODGE	6 RAY CHAMPION DRIVE	RAYTON	BLOEMFONTEIN	POSTNET SUITE 248	BLOEMFONTEIN	9324	051	4362808	082	8550066	051	4366389
MASELSPOORT RESORT & CONFERENCE CENTRE	N1 35KM TO BLOEMFONTEIN		BLOEMFONTEIN	PRIVATE BAG X20519	BLOEMFONTEIN	9300	051	4417848	-		051	4417865
REINHEIM CARAVAN PARK	LEONORA NO 3	GLEN	BLOEMFONTEIN	P. O. BOX 43	GLEN	9230	-		083	7781437	051	4332887
TOMS PLACE	35 KM , N1 SOUTH	-	BLOEMFONTEIN	P.O. BOX7001	BLOEMFONTEIN	9300	051	5640680	-		051	5640710
PHILLIP SANDERS RESORT	MASSELSPOORT ROAD	-	BLOEMFONTEIN	-	BLOEMFONTEIN	9300	051	4417611	-		051	4417547
SOETDORING NATURE RESERVE	BULTFONTEIN ROAD R70	40KM FROM CBD	BLOEMFONTEIN	P. O. BOX 529	BLOEMFONTEIN	9300	051	4339002	-		-	
RUSTFONTEIN NATURE RESERVE / DAM	N8 TO BOTSHABELO 8KM FROM BOTSHABELO	-	THABA NCHU	-	THABA NCHU		051	5262970	-		-	

ANNEXURE 4

Summary of Attractions database

NAME	STREET	SUBURB	TOWN	PADDRESS	PTOWN	PCODE	LCODE	LNUMBER	CCODE	CNUMBER	FCODE	FNUMBER
APPEAL COURT	C/O ELIZABETH & PRES. BRAND STREET	CBD	BLOEMFONTEIN	P.O. BOX 258	BLOEMFONTEIN	9300	051	4472769	051		051	4470830
BLOEMFONTEIN CITY HALL	C/O PRESIDENT BRAND AND CHARLES STREET	CBD	BLOEMFONTEIN		BLOEMFONTEIN	9300	051	4058469				4058604
BLOEMFONTEIN PUBLIC LIBRARY	C/O CHARLES AND WES BURGER STREET	CBD	BLOEMFONTEIN	CORNER PRESIDENT BRAND AND CHARLES STREET	BLOEMFONTEIN	9300	051		083	7200180	051	4058604
BLOEMFONTEIN ZOO	HENRY STREET	WILLOWS	BLOEMFONTEIN	P.O. BOX 3704			051	4058404			051	4058504
BOTSHABELO CRAFT CENTRE	10 RED STREET	BOTSHABELO	THABA NCHU				051	5343490	082	4220605	051	4058473
BOTSHABELO INDUSTRIAL AREA		INDUSTRIAL CENTRE	BLOEMFONTEIN	P.O. BOX 9251, BLOEMFONTEIN	BLOEMFONTEIN	9300	051	5341102	051		051	5343490
CHOET VISSER RUGBY MUSEUM	3 INNES DRIVE	WAVERLEY	BLOEMFONTEIN		BOTSHABELO	9781	051	4364124	083	3098779	051	5341104
DAM VAN TRANE	N1 NORTH	TEMPE MILITARY BASE	BLOEMFONTEIN				051	4058469			051	4364125
DIGARETENENG	LOFONG STREET	MANGAUNG	BLOEMFONTEIN				051	4471983	084	3281217	051	4471962
FIRE BRIGADE MUSEUM	CHURCH STREET	ERLICH PARK	BLOEMFONTEIN	P.O. BOX 196	BLOEMFONTEIN	9301	051	4058730			051	4471982
FIRST RAADSAAL MUSEUM	85 ST GEORGE STREET	CBD	BLOEMFONTEIN		BLOEMFONTEIN	9300	051	4479809				
FRANKLIN NATURE RESERVE (NAVAL HILL)		NAVAL HILL	BLOEMFONTEIN	P.O. BOX 3704	BLOEMFONTEIN	9300	051	4050687				
FREE STATE AGRICULTURAL MUSEUM	GIELIE JOUBERT STREET	GLEN EXTENSION	GLEN	PRIVATE BAG X01	GLEN	9300	051	8812244			051	4307041
FREE STATE BOTANICAL GARDENS	RAYTON ROAD	RAYTON	BLOEMFONTEIN	P.O. BOX 29036,	GLEN	9310	051	4303530			051	8811722
FREE STATE YOUTH MATTYRS	NYOKONG STREET	MANGAUNG	MANGAUNG		DANHOF		051	4012708			051	4364101
FRESHFORD HOUSE MUSEUM	31 KELLNER STREET	ARBORETUM	BLOEMFONTEIN	P.O. BOX 821	BLOEMFONTEIN	9300	051	4355418	084	3281217	051	4492879
HERBERT CROSSWAITE		RATLOU	THABA NCHU				051	4479809			051	4476273
HERTZOG SQUARE	PRESIDENT BRAND STREET	CBD	BLOEMFONTEIN		BLOEMFONTEIN	9300	051	4058489				
HIGH COURT	C/O FONTEIN & PRES. BRAND STREET	CBD	BLOEMFONTEIN	PRESIDENT BRAND STREET	BLOEMFONTEIN	9300	051	4478837			051	4307041
HOFFMAN SQUARE	C/O MAITLAND AND CHURCH STREET	CBD	BLOEMFONTEIN	PRIVATE BAG X 20612	BLOEMFONTEIN	9300	051	4058489				
JOHANNES STEGMAN ART GALLERY	D.F. MALAN DRIVE	UNIVERSITAS	BLOEMFONTEIN	P.O. BOX 339	BLOEMFONTEIN	9300	051	4012708	073	8552103	051	4492879
KGOPISO HOUSE	405 STATION ROAD	THABA NCHU	THABA NCHU	P.O. BOX 1314, GARAPULA	THABA NCHU	9775	051	8741350	073	8552103		
KINGS PARK	KINGSWAY ROAD	WILLOWS	BLOEMFONTEIN				051	4058489				
KLEIN MAGASA HALL	KING STREET	MANGAUNG	MANGAUNG				051	4355418	084	3281217	051	4473459
MAPHIKELA HOUSE		BATHO	BLOEMFONTEIN				051	4328753	084	3281217		
MMABANA CULTURAL CENTRE	103-105 MARKET SQUARE	THABA NCHU	THABA NCHU	PRIVATE BAG X12, THABA NCHU	THABA NCHU	9780	051	8751840			051	8751010
MOSUPATSELA COMMUNITY RADIO STATION	BLOCK C- BOTSHABELA	BOTSHABELA					051	5310800			051	5341356
MUSEUM OF THE ARMOURED CORPS	FRANS STEYNBERG AVENUE	TEMPE MILITARY BASE	BLOEMFONTEIN	PRIVATE BAG X40004	TEMPE	9318	051	4021762	082	3350442	051	4021701
NATIONAL AFRIKAANSE LITERATURE MUSEUM	C/O PRESIDENT BRAND AND MAITLAND STREET	CBD	BLOEMFONTEIN	PRIVATE BAG X20543	BLOEMFONTEIN	9300	051	4054034			051	4054259
NATIONAL MUSEUM	36 ALIWAL STREET	CBD	BLOEMFONTEIN	P.O. BOX 266	BLOEMFONTEIN	9300	051	4479809	082	5952418	051	4478273
NATIONAL MUSIC MUSEUM	36 ALIWAL STREET	ARBORETUM	BLOEMFONTEIN	P.O. BOX 266	BLOEMFONTEIN	9300	051	4479809			051	4476273
NATIONAL THEATRE MUSEUM	36 ALIWAL STREET	ORANJESIG	BLOEMFONTEIN	P.O. BOX 266	BLOEMFONTEIN	9300	051	4479809			051	4476273
NATIONAL WOMEN'S MEMORIAL	MONUMENT ROAD	ORANJESIG	BLOEMFONTEIN		BLOEMFONTEIN	9300	051	4473447			051	4473432
OLD MISSION HOUSE	18 HENRY SMITH STREET	THABA NCHU	BLOEMFONTEIN	P.O. BOX 821			051	4473447			051	4473432
OLIEWENHUIS ART MUSEUM	UNION STREET		BLOEMFONTEIN				051	7865809	082	7865955	051	4479283
ORCHID HOUSE		WAVERLEY	BLOEMFONTEIN				051	4359110	072	4761568	051	4479283
PHAHAMENG CEMETRY- HEROES ACRE	MAGEGENENE STREET	MANGAUNG TOWNSHIP	BLOEMFONTEIN				051	4471983	084	3281217	051	4471382
PRESIDENCY MUSEUM	PRESIDENT BRAND STREET	CBD	BLOEMFONTEIN	P.O. BOX 6581	BLOEMFONTEIN	9300	051	4480949			051	
PRESIDENT BRAND STREET	PRESIDENT BRAND STREET	CBD	BLOEMFONTEIN				051	4480949				
PRESIDENT STEYN STATUE	NELSON MANDELA DRIVE	UNIVERSITAS	BLOEMFONTEIN				051	4058489				
PRESIDENTS ACRE AND PRESIDENT CEMETERY	CORNER PRESIDENT BRAND AND CHURCH STREET	ORANJESIG	BLOEMFONTEIN				051	4058489				
QUEEN'S FORT MILITARY MUSEUM	116 CHURCH STREET	CBD	BLOEMFONTEIN	P.O. BOX 6581	BLOEMFONTEIN	9300	051	4475470			051	4477265
RUSTFONTEIN NATURE RESERVE/ DAM	N6, 6KM FROM BOTSHABELO		THABA NCHU				051	5262970				
SALVATION ARMY CHURCH AND SCHOOL	SESING STREET		THABA NCHU				051	4355418				
SETSHABELO CENTRE		MANGAUNG	MANGAUNG				051	4355418	084	3281217		
SOETDORING NATURE RESERVE	BULTFONTEIN ROAD R70	40KM FROM CBD	BLOEMFONTEIN	P.O. BOX 529	BLOEMFONTEIN	9300	051	4355418	084	3281217	051	4479283
THE FOUNTAIN	SELBOURNE STREET	WILLOWS	BLOEMFONTEIN				051	4339002				
THE FOURTH RAADSAAL	C/O PRESIDENT BRAND AND CHARLES STREET	CBD	BLOEMFONTEIN	PRIVATE BAG X20601	BLOEMFONTEIN	9300	051	4058489				
THE LAMANT-MUSSEY MUSEUM	WAINS STREET	NAVAL HILL	BLOEMFONTEIN	P.O. BOX 3704	BLOEMFONTEIN	9300	051	4071100	082	5671785	051	4480890
THE NEW DUTCH REFORMED CHURCH		CBD	BLOEMFONTEIN	P.O. BOX 3704	BLOEMFONTEIN	9300	051	4479809				
THE OLD DUTCH REFORMED CHURCH		GA RATLOU	THABA NCHU				051		082	7125659	051	7125659
THE WAR MUSEUM OF SPECIAL SERVICE BATTALLION	SHARLY VAN DER MERWE STREET	TEMPE MILITARY BASE	BLOEMFONTEIN				051	4021400		7125659	051	4021404

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NAME	STREET	SUBURB	TOWN	PADDRESS	PTOWN	PCODE	LCODE	LNUMBER	CCODE	CNUMBER	FCODE	FNUMBER
THE WHITE HORSE	ANDRIES PRETORIUS STREET	NAVAL HILL	BLOEMFONTEIN	P. O. BOX 3704	BLOEMFONTEIN	9300	051	4479909				
TIERPORT DAM	N1 38KM SOUTH	-	BLOEMFONTEIN	-								
TWIN SPIRED CHURCH	HENRY AND HILL STREET	CBD	BLOEMFONTEIN	-			051	4058489	-	-	-	-
VOORTREKKER SITE	-	-	BLOEMFONTEIN	-			051	4480949	-	-	-	-
VOORTREKKER'S GRAVE	MARIA MOROKA NATURE RESERVE	THABA NCHU	BLOEMFONTEIN	P. O. BOX 247	BLOEMFONTEIN	9300	051	8732427	083	3330326	051	8732466
MARIA MOROKA NATURE RESERVE	-	THABA NCHU	BLOEMFONTEIN	P. O. BOX 246	BLOEMFONTEIN	9300	051	8732427	083	3330326	061	8732466
VOORTREKKER'S MONUMENT	GROOTHOEK DAM	RANKOKGO	THABA NCHU	P. O. BOX 246	THABA NCHU	9780	051	8732427	083	3330326	061	8732466
WAGON MUSEUM	95 GEORGE STREET	CBD	BLOEMFONTEIN	-	BLOEMFONTEIN	-	051	4479909	-	-	-	-
WAR MUSEUM	MONUMENT ROAD	GENERAL DE WET	BLOEMFONTEIN	P. O. BOX 34061, FUNASIG	BLOEMFONTEIN	9325	051	4473447	084	5566120	051	4471322

ANNEXURE 5

Summary of Conferencing database

NAME	STREET	SUBURB	TOWN	PADDRESS	PTOWN	PCODE	LCODE	LNUMBER	CCODE	CNUMBER	FCODE	FNUMBER
ALDERGATE WEDDING & CONFERENCE CENTRE	OFF N1 TO JOHANNESBURG	GLEN	BLOEMFONTEIN	P.O. BOX 13253	NOORDSTAD	9302	051	4324720	083	3599208	051	4324720
AMANZI GUEST HOUSE	PLOT NO 2	MASELSPOORT	BLOEMFONTEIN	POSTNET SUITE 271, PRIVATE BAGX 01	BRANDHOF	9324	051	5227934	083	3299044	051	4442742
ATLANTIS GUEST HOUSE	33 JACOBS STREET	UNIVERSITAS	BLOEMFONTEIN			9324	051	4511781	082	8994403	051	4511781
BAINS GAME LODGE	4 KM ON OLD KIMBERLEY ROAD		BLOEMFONTEIN	P.O. BOX 12981	BRANDHOF	9324	051	4381004	082	4133883	051	4362356
BAYSWATER LODGE	85 WILCOCKS ROAD	BAYSWATER	BLOEMFONTEIN			9332	051	5226284		4486884	051	4351681
BLOEM SPA AND CONFERENCE CENTRE	LILYVALE ROAD	RAYTON	BLOEMFONTEIN	P.O. BOX 43462, HEUWLSIG	BLOEMFONTEIN	9310	051	4332020			051	4517781
BLOEMFONTEIN INN	17 EDISON STREET	RAYTON	BLOEMFONTEIN	P.O. BOX 29879	BLOEMFONTEIN	9300	051	5228924		4498884	051	4362356
BLOEMFONTEIN SHOW GROUNDS	1 CURIE AVENUE	HOSPITAAL PARK	BLOEMFONTEIN	P.O. BOX 377	BLOEMFONTEIN	9300	051	4448884			051	4422082
BOTANICAL GARDENS	1 HANNA ROAD OFF R702	FICHARDPARK	BLOEMFONTEIN				051					
BOTANICAL GARDENS	20 PRESIDENT BRAND STREET	DAN PIENAAR	BLOEMFONTEIN	P.O. BOX 29008	DANHOF	9324	051	4363530			051	4364101
CENTRAL UNIVERSITY OF TECHNOLOGY	20 PRESIDENT BRAND STREET	CBD	BLOEMFONTEIN	PRIVATE BAG X 20539	LANGENHOVEN PARK	9300	051	5073169			051	5073199
UNIVERSITY OF THE FREE STATE	NELSON MANDELA AVENUE	CBD	BLOEMFONTEIN			9300	051	4013383			051	4446675
CITY HALL COMPLEX - BUNGA A&B	C/O MARGRAAF & NELSON MANDELA DRIVE	CBD	BLOEMFONTEIN	P.O. BOX 3708	BLOEMFONTEIN	9301	051	4058470			051	4058387
CITY HALL COMPLEX - CLAREDON HALL	C/O MARGRAAF & NELSON MANDELA DRIVE	CBD	BLOEMFONTEIN	P.O. BOX 3707	BLOEMFONTEIN	9301	051	4058470			051	4058367
CITY HALL COMPLEX - CITY HALL	C/O MARGRAAF & NELSON MANDELA DRIVE	CBD	BLOEMFONTEIN	P.O. BOX 3709	BLOEMFONTEIN	9301	051	4058470			051	4058367
CITY HALL COMPLEX - COMMITTEE ROOM	C/O MARGRAAF & NELSON MANDELA DRIVE	CBD	BLOEMFONTEIN	P.O. BOX 12015	BLOEMFONTEIN	9301	051	4441253			051	4440571
CITY HALL COMPLEX - FLOREAT HALL	C/O MARGRAAF & NELSON MANDELA DRIVE	CBD	BLOEMFONTEIN			9301	051	4300167			051	4301097
CITY HALL COMPLEX - INDABA CONFERENCE ROOM	C/O MARGRAAF & NELSON MANDELA DRIVE	CBD	BLOEMFONTEIN	P.O. BOX 43034	BLOEMFONTEIN	9301	051	4058470		3030131	051	4058387
CITY HALL COMPLEX - ROSE HALL A&B	CORNER NELSON MANDELA AND PARFITT	BRANDWAG	BLOEMFONTEIN	P.O. BOX 3552	BLOEMFONTEIN	9301	051	4442874			051	4442192
CITY LODGE	25 MILNER AVENUE	WAVERLEY	BLOEMFONTEIN			9301	051	4058374			051	4058387
CITY GUEST HOUSE	25A KM1 SOUTH		BLOEMFONTEIN			9301	051	5640733			051	5640635
DE OUDE KRAAL COUNTRY LODGE			BLOEMFONTEIN	P.O. BOX 28994	DANHOF	9325	051	4398225	083	2650265	051	4907733
DIAS GUEST HOUSE	114 ANDRIES PRETORIUS STREET	DAN PIENAAR	BLOEMFONTEIN			9310	051	4334314	082	7708473	051	4332374
ELLENROY GUEST HOUSE	DU PLESSIS AVENUE	NAVELSIG	BLOEMFONTEIN			9324	051	4366522			051	
FLEO LIFESTYLE	RAYTON ROAD	LANGENHOVEN PARK	BLOEMFONTEIN	P.O. BOX 13223	BLOEMFONTEIN	9310	051	4511720	072	8267662	051	4309988
GECKO'S RESTAURANT (BOTANICAL GARDENS)	C/O MARGRAAF & CHARLS STREET	CBD	BLOEMFONTEIN	P.O. BOX 29306	DANHOF	9310	051	4450008	082	5576533	051	4442050
HALEVY HERITAGE HOTEL	18 KAROO AVENUE	BRANDWAG	BLOEMFONTEIN	P.O. BOX 28550	DANHOF	9324	051	4441263			051	4440671
HIDE PLACE LODGE	C/O DAN PIENAAR AVENUE & MELVILLE AVENUE	WILLOWS	BLOEMFONTEIN			9324	051	4441263			051	4440671
HUGENOOT GUEST HOUSE	15 HUGENOOT STREET	HEUWELSIG	BLOEMFONTEIN	P.O. BOX 12015	BLOEMFONTEIN	9301	051	4300167	082	5596173	051	4301097
SOUTHERN SUN BLOEMFONTEIN	LUCAS STEYN STREET	WILLOWS	BLOEMFONTEIN			9324	051	4441253			051	4440671
ILIANGA ESTATE	53 VAN LOMBROSA AVENUE	RODOEWAL	BLOEMFONTEIN	P.O. BOX 43034	HEUWELSIG	9332	051	4360460	083	3030131	051	4308259
INDABA LODGE	N1, 10 KM NORTH	GROENVLEI	BLOEMFONTEIN			9300	051				051	4417903
KLIPKRAAL HEUWELSIG	KLOOF ROAD & KELLNER STREET	WESTDENE	BLOEMFONTEIN			8900	051	4511855	072	2909965	051	4477746
KLOOF LODGE	14 MIDWAY STREET	ROODEWAL	BLOEMFONTEIN	P.O. BOX 25562	LANGENHOVEN PARK	9330	051	4477603	082	4552049	051	4417686
KOPANO NOKENG COUNTRY LODGE	14 STAPELBERG STREET	BRANDWAG	BLOEMFONTEIN	P.O. BOX 10501	RENOSTERSPRUIT	9326	051	4417817			051	4417686
LA VIE AND ROSE LODGE	BLOEMENDAL ROAD	RAYTON	BLOEMFONTEIN				051	4441098			051	4441098
LE FLEUR SCHOOL	KOK AVENUE	FERREIRA	BLOEMFONTEIN	P.O. BOX 29073	DANHOF	9310	051	4366750			051	4366533
LUXUR LODGE AND HIGHWAY LODGE	91 DU PLOOY CRESENT	FICHARD PARK	BLOEMFONTEIN	P.O. BOX 22746	KAGISANANG	9300	051	4367749	083	6823567	051	4367749
MARTIE DU PLESSIS SCHOOL	N1, 3KM TO BLOEMFONTEIN	RAYTON	BLOEMFONTEIN	PRIVATE BAG X20519	BLOEMFONTEIN	9309	051	4417048			051	4417085
MASELSPOORT RESORT & CONFERENCE CENTRE	6 RAY CHAMPION DRIVE	THABA NCHU	BLOEMFONTEIN	POSTNET SUITE 248	BRANDHOF	9324	051	4362808			051	4362808
MIZPAH LODGE	103-104 MARKET SQUARE	SELOSESHA	BLOEMFONTEIN	PRIVATE BAG X 12	1THABA NCHU	9780	051	8751640			051	8751010
NAADANA CULTURAL CENTRE	3 BRIDGE STREET	THABA NCHU	BLOEMFONTEIN	P.O. BOX 131	1THABA NCHU	9780	051	8751060			051	8751060
NALEDI SUN	BULTFONTEIN ROAD	BRANDWAG	BLOEMFONTEIN				051				051	
OLIVE RANCH	4 KM FROM NORTHRIDGE MALL		BLOEMFONTEIN			9300	051		082	584358	051	
PREMIER PROTEA HOTEL	202 NELSON MANDELA DRIVE	UNIVERSITAS	BLOEMFONTEIN	P.O. BOX 12732	BLOEMFONTEIN	9300	051	4444321			051	4444322
PRESIDENT HOTEL	1 UNION AVENUE	NAVAL HILL	BLOEMFONTEIN	P.O. BOX 1851	BLOEMFONTEIN	9300	051	4301111			051	4364141
PROTEA HOTEL THABA NCHU	GROOTHOEK DAM ROAD	GROOTHOEK	THABA NCHU	PRIVATE BAG X 017	THABA NCHU	9780	051	0714200			051	0732161
PROTEA LANDMARK LODGE	EAST BURGER STREET	CBD	BLOEMFONTEIN	P.O. BOX 2212	BLOEMFONTEIN	9300	051	405800			051	4477102
QUEENSPARK LODGE	41 PARFITT AVENUE	PARKWEST	BLOEMFONTEIN	P.O. BOX 20747	DANHOF	9310	051	4440121	082	4227056	051	4445483
REYNECKE PARK	98 BRENGAM WEG	OVIAGAFONTEIN	BLOEMFONTEIN	P.O. BOX 21668	UNIVERSITAS	9321	051	5233888	082	9091515	051	5233887
RIVER OF JOY GUEST HOUSE	13A FROM N1 TO JOHANNESBURG	213 GLEN EXTENTION	BLOEMFONTEIN	P.O. BOX 22282	EXTON ROAD	9313	051	4417771	083	46275623	051	8612009
SANti DU PLESSIS	12 FIRST AVENUE	CBD	BLOEMFONTEIN	P.O. BOX 9312	BLOEM FONTEIN	9300	051	5225731			051	5225731
SHAWU LODGE	2 D.F. MALHERBE DRIVE	UNIVERSITAS	BLOEMFONTEIN				051				051	
STEWARD GUESTHOUSE	86 ALIWAL STREET	WAVERLEY	BLOEMFONTEIN			9924	051	4494828	082	4461600	051	4494828
SUMMERWOOD	8A PARSEKVELD AVENUE	RODOEWAL	BLOEMFONTEIN	P.O. BOX 12741	BRANDHOF	9924	051	4395590	082	5558980	051	4390961
SWAN LAKE	BULTFONTEIN ROAD		BLOEMFONTEIN	P.O. BOX 389	BRANDHOF	9300	051	4417902			051	4495733
SYNDOL CENTRE	147 ST ANDREWS STREET	CBD	BLOEMFONTEIN	P.O. BOX 3004	BLOEMFONTEIN	9300	051	4060700			051	4394070
TAPESTRY GUEST HOUSE	5A MILNER ROAD	WAVERLEY	BLOEMFONTEIN	5A MILNER ROAD	BLOEMFONTEIN	9322	051	6229098	083	38806603	051	6224448
THE RESTING PLACE	50 SCHOLTZ STREET	PELLISIER	BLOEMFONTEIN			9322	051	4102000			051	4102410
THE WINDMILL CASINO AND ENTERTAINMENT CENTRE	C/O JAN PIEREWIET & N1	UNIVERSITAS	BLOEMFONTEIN	NOORDSTAD	NOORDSTAD	9301	051	5229874			051	5226874
UNITAS HERBERG	21 DUTTON CRESCENT STREET	BRANDWAG	BLOEMFONTEIN	22 LOGEMAN STREET	UNIVERSITAS	9301	051	5229874			051	5226874
VILLA FAVORITA	22 LOGEMAN STREET	SPITSKOP	BLOEMFONTEIN	P.O. BOX 12630	BRANDHOF	9324	051	4444010			051	4444010
ZEBRA CROSSING	1 NUSSCU USRNG LAAN	FLEURDAL	BLOEMFONTEIN	P.O. BOX 94133	LANGENHOVEN PARK	9330	051		082	8744522	051	
KHANYISILE EVENT MANAGEMENT	11/74 MAJARA STREET	BLOEMANDA	BLOEMFONTEIN	11/74 MAJARA STREET	FAUNASIG	9225	051	5227743			051	5227743
KHOBOH'S FOODS	110 NELSON MANDELA DRIVE	LANGENHOVEN PARK	BLOEMFONTEIN			9300	051	4351444			051	4468250
KZA	3510 NYOKONG STREET	BOCHABELA	BLOEMFONTEIN			9300	080	1921921			051	4305600
KHAYALAM INTERIORS AND EVENTS		LANGENHOVEN PARK	BLOEMFONTEIN	POSTNET SUITE 271, PRIVATE BAGX01	BRANDHOF	9324	051	4324720	083	33982206	051	4324720

ANNEXURE 6

Summary of Entertainment database

NAME	TYPE	LCODE	LNUMBER	CCODE	CNUMBER	FCODE	FNUMBER	BUILDING	STREET	SUBURB	TOWN
2ND AVENUE CAFE	ITALIAN RESTAURANT AND TAKE AWAYS	051	4483088	092	7887732	051	4483089		C/O 2ND AVENUE & KELLNER STR	WESTDENE	BLOEMFONTEIN
AD'S INN	TAVERN	051	9781012	083	2471415				THABA NCHU ZONE 4	THABA NCHU	THABA NCHU
AFTER DARK TAVERN	TAVERN	051	8733400	083	7470906				SELOSESHA UNIT 1 .	SELOSESHA	THABA NCHU
ALABAMA SPUR	FAMILY RESTAURANT	051	4448760			051	4448877	MIMOSA MALL	KELLNER STREET	WESTDENE	BLOEMFONTEIN
ANDRE HUGENET	THEATRE	051				051	4305523		2ND AVENUE ELIZABETH STREET	WESTDENE	BLOEMFONTEIN
ANGELOS	RESTAURANT	051	4482051			051	4308925	?	CORNER, GODDARD AND CHURCH STREET	CBD	BLOEMFONTEIN
ANTIQUE TAVERN	TAVERN		4511781	073	8233718				STAND 2585, SELOSESHA UNIT 1	SELOSESHA	THABA NCHU
BAINS GAME LODGE	TAVERN	051	8730391	072	2376446				20KM FROM BLOEMFONTEIN ALONG OLD KIMBERLEY ROAD	LANGENHOVEN	BLOEMFONTEIN
BAPLONYWA TAVERN	PUB								STAND 1832 SELOSESHA UNIT 1	SELOSESHA	THABA NCHU
BARAK'S CAFE	TAVERN								16 2ND AVENUE		
BASH PUB AND RESTAURANT	GREEN RESTAURANT & NIGHT CLUB	051	4305502			051	4305425		18 2ND AVENUE	WESTDENE	BLOEMFONTEIN
BEEF BARON	PUB AND RESTAURANT	051	4322181			051	4322181	MANGAUNG	219 MOCHERI STREET	BATHO LOCATION	MANGAUNG
BEETHOVEN'S COFFEE CAFE	STEAKS, SEAFOOD, A LA CARTE	051	4474280			051	4471768		22 2ND AVENUE	WESTDENE	BLOEMFONTEIN
BIC MAC'S FAST FOODS	RESTAURANT, COFFEE SHOP AND TAKE AWAY	051	4487223			051	4341646	VICTORIAN SQUARE SHOP 28	2ND AVENUE	WESTDENE	BLOEMFONTEIN
BIMBO'S TAKE AWAYS	TAKE AWAYS	051				051	4448189		CNR ENTERPRISE AND P HUMAN STREET	HAMILTON	BLOEMFONTEIN
BURNING SPEAR SPUR	FAMILY RESTAURANT	051							179 NELSON MANDELA DRIVE	COLLEGE SQUARE	BLOEMFONTEIN
BUSH PUB & GRILL	PUB & GRILL	051	4511338			051	4511761	BLOEMGATE CENTRE	194 ZASTRON STREET	WESTDENE	BLOEMFONTEIN
BUTCHER BROTHERS	STEAKHOUSE	051	4301253			051	4301253	BAINS GAME LODGE	20M FROM BLOEMFONTEIN ALONG OLD KIMBERLEY ROAD	LANGENHOVEN	BLOEMFONTEIN
BUTCHERS PRIME CUT	RESTAURANT	051	4301253	076	3170926	051	4301253	LOCH LOGAN WATERFRONT	ST ANDREW STREET	WATERFRONT	BLOEMFONTEIN
CAFE DULCE KELLNER STREET	COFFEE SHOP AND TAKE AWAYS	051	4477907			051	4477904	VICTORIAN SQUARE	SECOND AVENUE AND REID STREET	WESTDENE	BLOEMFONTEIN
CAFE DULCE CURIE AVENUE	RESTAURANT	051	4442728	083	4128908	051	4443450	SHOP 16 BRANDWAG CENTRE	CPO MELVILLE & KELLNER STREET	BRANDWAG	BLOEMFONTEIN
CAFE DULCE EEUFEES ROAD	RESTAURANT	051	4102069			051	4102410	WINDMILL CASINO	CORNER JAN PIERWIET AND CURIE AVENUE	PELLISER	BLOEMFONTEIN
CAFE VENUES VEREENIGING DRIVE	COFFEE SHOP AND TAKE AWAYS	051	4331606			051	4331808	NORTHRIDGE SHOPPING CENTRE SHOP 37	EEUFEES ROAD	PELLISER	BLOEMFONTEIN
CALABASH RESTAURANT	COFFEE SHOP	051	5299909						VEREENIGING DRIVE	BAYSWATER	BLOEMFONTEIN
CAPE TOWN FISH MARKET	AFRICAN FOOD RESTAURANT	051	4488885	076	3170926	051	4488026	CHECKERS HYPER	VEREENIGING DRIVE	FLEURDAL	BLOEMFONTEIN
CAPTAIN DOREGO'S MGREGOR STREET	RESTAURANT, SUSHI BAR & FISH MARKET	051	4366159			051	4365301	PRELLER SQUARE SHOP 10	118 ZASTRON STREET	WESTDENE	BLOEMFONTEIN
CAPTAIN DOREGO'S NELSON MANDELA DRIVE	TAKE AWAYS	051							LOUW/WEHNAAR STREET	DAN PIENAAR	BLOEMFONTEIN
CAPTAIN DOREGO'S CHINESE STREET	TAKE AWAYS	051							MGREGOR STREET	WESTDENE	BLOEMFONTEIN
CAPTAIN DOREGO'S CHURCH STREET	TAKE AWAYS	051							NELSON MANDELA DRIVE	CBD	BLOEMFONTEIN
CAPTAIN DOREGO'S	TAKE AWAYS	051							CHINESE STREET	CBD	BLOEMFONTEIN
CAPTAIN DOREGO'S HARVEY ROAD	TAKE AWAYS	051						GAME CENTRE	CHURCH STREET	CBD	BLOEMFONTEIN
CAPTAIN DOREGO'S POWER STREET	TAKE AWAYS	051							HARVEY ROAD	CBD	BLOEMFONTEIN
CAPTAIN DOREGO'S ST ANDREW STREET	TAKE AWAYS	051							POWER STREET	CBD	BLOEMFONTEIN
CATCH 22	SEAFOOD	051	4446877			051	4446877	MIMOSA MALL	8T ANDREW STREET	CBD	BLOEMFONTEIN
CHINA PALACE	CHINESE RESTAURANT	051		072	6532277				KELLNER STREET	CBD	BLOEMFONTEIN
CIVIC THEATRE	THEATRE	051							97 ZASTRON STREET	WESTDENE	BLOEMFONTEIN
COFFEE BARREL SHOP	COFFEE SHOP	051	4306348			051	4305523		2ND AVENUE	WESTDENE	BLOEMFONTEIN
DE OUDE KRAAL COUNTRY RESTAURANT	RESTAURANT	051	5640535	082	413798	051	5640535	WESTDENE CENTRE	1ST AVENUE	WESTDENE	BLOEMFONTEIN
DEBONAIRS PIZZA	TAKE AWAYS	051							N1 SOUTH (30KM)		BLOEMFONTEIN
DIAMOND LILS	RESTAURANT & WINE CELLAR	051	4102069			051	4102410	PROVIDEMANO'S CENTRE,CALTEX HOUSE	OFFRAMP 153		BLOEMFONTEIN
DIE KELLER	RESTAURANT & WINE CELLAR	051	4487040			051	4487840	WINDMILL CASINO	NELSON MANDELA	CBD	BLOEMFONTEIN
DIE TERRACE	LIGHT LUNCHES, COFFEE SHOP	051	4488834			051	4488834		CORNER JAN PIERWIET AND CURIE AVENUE	PELLISER	BLOEMFONTEIN
DROS RESTAURANT & WINE CELLAR	RESTAURANT	051		?		051			149 ZASTRON	WESTDENE	BLOEMFONTEIN
EAST END PUB & GRILL	RESTAURANT	051	4305900			051	4305907	PRELLER SQUARE	10 HARRY SMITH STREET	WESTDENE	BLOEMFONTEIN
EDEN PUB AND GRILL	PUB & GRILL	051	4327408						GRAAF RENEITT STREET	DAN PIENAAR	BLOEMFONTEIN
FARM MARKET	PUB	051	4322833						2 DENNIS POOLEY STREET	EAST END	BLOEMFONTEIN
FOOD FOR THOUGHT(RAMBLERS)	STREET MARKET	051	4056023			051	4322834	MANGAUNG	4824 PITSO STREET	BOCHABELA	BLOEMFONTEIN
GALAXY RESTAURANT	RESTAURANT	051	4306603			051	4306510	CENTRAL MARKGRAAFF	NELSON MANDELA DRIVE	LANGENHOVEN PARK	BLOEMFONTEIN
GECKO'S	PIZZERIA & BAR	051	4443320			051	4306808	RAMBLERS CLUB	ALIWAL STREET	WESTDENE	BLOEMFONTEIN
GLEN PUB & GRILL	RESTAURANT	051	4306022			051	4361952		1 BIRELICH STREET	WILLOWS	BLOEMFONTEIN
GOLDEN CLOUD SPUR	PUB & GRILL	051				051	4306522		BAYTON DRIVE	BOTANIKGA, GARDENS	BLOEMFONTEIN
GOLDEN NUGGET SPUR STEAK RANCH	FAMILY RESTAURANT	051	4472245			051	4472245	CALTEX HOUSE	80 GLEN ROAD	HILTON	BLOEMFONTEIN
GREGORY'S PUB & GRILL	RESTAURANT	051				051		208 NELSON MANDELA DRIVE	CORNER JAN PIERWIET AND CURIE AVENUE	WESTDENE	BLOEMFONTEIN
GUBS HONEY HIVE JAZZ CLUB	PUB & GRILL	051	4333892	082	4487444	051	4333892	WINDMILL CASINO	8 LESSING STREET, ESTCOURT	PELLISER	BLOEMFONTEIN
HA GO CHINESE RESTAURANT	CLUB	051	4489819	7		051	4489819	ROCKLANDS	282 MOSHOESHE ROAD	WESTDENE	BLOEMFONTEIN
HIGH TIDE HEIGHTS	CHINESE & SUSHI	051	4307909	7		051	5229484	?	49, 2ND AVENUE,	MANGAUNG	BLOEMFONTEIN
HOBBIT FINE DINING	RESTAURANT	051	4470663			051	4470663	HOBBIT BOUTIQUE HOTEL	21 PRES STEYN LAAN	WESTDENE	BLOEMFONTEIN

NAME	TYPE	LCODE	LNUMBER	CCODE	CNUMBER	FCODE	FNUMBER	BUILDING	STREET	SUBURB	TOWN
HOUSE OF COFFEES	COFFEE SHOP	051	4305794	?					GRAAFF REINETT STREET	DAN PIENAAR	BLOEMFONTEIN
HOUSE OF COFFEES WATERFRONT	COFFEE SHOP	051	4301447	?					HENRY STREET	WILLOWS	BLOEMFONTEIN
JAZZ PUB	PUB	051	8733089	076	1582004				MOKOBANE STREET	THABA NCHU	BLOEMFONTEIN
JAZZ TIME	A LA CARTE RESTAURANT AND COCKTAILS	051	4305727	072	231760	051	4301283	LOCH LOGAN WATERFRONT	HENRY STREET	WILLOWS	BLOEMFONTEIN
JUICY LUCY	SNACK BAR	051	4441369	?		051	4441393	MIMOSA MALL	84 BESSELSEN STREET	WESTDENE	BLOEMFONTEIN
KALAHARI FISH WESTDENE	SEAFOOD & A LA CARTE	051	4440247	?		051	4446808	MIMOSA MALL	KELLNER STREET	WESTDENE	BLOEMFONTEIN
KALAHARI FISH KELLNER STREET	RESTAURANT	051	4446914	?		051	4446916	MIMOSA MALL	KELLNER STREET	WESTDENE	BLOEMFONTEIN
KENTUCKY FRIED CHICKEN ST ANDREW STREET	TAKE AWAYS	051		?		?			69 ST ANDREW STREET	CBD	BLOEMFONTEIN
KENTUCKY FRIED CHICKEN MARGRAAFF STREET	TAKE AWAYS	051		?		?			123 CURIE AVENUE	FLEURDAL	BLOEMFONTEIN
KEYSTONES	NIGHT CLUB	?		092	4558821	?			CORNER ZASTRON AND MARGRAFF STREET	WESTDENE	BLOEMFONTEIN
KIES AND KEUR	HOME INDUSTRY	051	5222317	?		051	4351133	BLOEMGATE CENTRE	NELSON MANDELA AVENUE	WESTDENE	BLOEMFONTEIN
KINE CENTRE	CINEMA	051		?		?		PICK N PAY CENTRE	BENADERYLAAN	FICHARDTPARK	BLOEMFONTEIN
LAPOLOSA TAVERN	TAVERN	051		?		?			97 ST ANDREW STREET	WESTDENE	BLOEMFONTEIN
LEVISIUR RESTAURANT	RESTAURANT	051	4030609	073	2335548	051	4030609	HALRVEY HERITAGE HOTEL	SELOSESHA UNIT 1	SELOSESHA	THABA NCHU
LOS ANGLES TAVERN	TAVERN	051		072	6302920	051	4492994	DYNARG WALK	JAN SPIES AVENUE	LANGENHOVEN PARK	BLOEMFONTEIN
LOVE AND HAPPINESS ENTERTAINMENT CENTRE	RESTAURANT AND BAR	051	4446792	082	6302920	051	4446792	BEHIND RATLOU COMPLEX	167 ZASTRON STREET	BLOEMFONTEIN	BLOEMFONTEIN
MASELSPOORT RESTAURANT	RESTAURANT	051	4410090	082	8952239	051	4417905	MASELSPOORT HOLIDAY RESORT AND CONFERENCE CENTRE	18 KM FROM BLOEMFONTEIN	MASELSPOORT	BLOEMFONTEIN
MATUKUNENG TAVERN	TAVERN	051	4304528	078	2626002	?			1095 RATLOU LOCATION STATION ROAD	RATLOU LOCATION	THABA NCHU
MAXI'S HOME STYLE COOKING	TAKE AWAYS	051	4446073	082	5548004	051	4464972		19 SECOND AVENUE	WILLOWS	BLOEMFONTEIN
MC DONALDS	TAKE AWAYS	051	4488935	?		051	4482994		167 ZASTRON STREET	WESTDENE	BLOEMFONTEIN
MEDITERANEAN	RESTAURANT	051	4495194	?		051	4446808		HENRY STREET	WESTDENE	BLOEMFONTEIN
MEXICAN BURGER RESTAURANT	SEAFOOD, PASTAS & STEAK RESTAURANT	051	4304528	078		?		IRENIOLA CENTRE	19 SECOND AVENUE	WILLOWS	BLOEMFONTEIN
MIKE TAVERN	TAVERN	051	4446792	073	8315620	051	4446792	MIMOSA MALL, SHOP U19	STAND 3095	THABA NCHU	THABA NCHU
MILKY LANE	SNACKS, LIGHT MEALS	051	8732602	073	6095598	?			KELLNER STREET	WESTDENE	BLOEMFONTEIN
MILWAUKEE SPUR	FAMILY RESTAURANT	051	4443393	?		051	4443393	MIMOSA MALL	THABA NCHU ZONE 1	THABA NCHU	BLOEMFONTEIN
MO TOWN TAVERN	TAVERN	051	4464412	0795	4933454	0795	4302193	PRESIDENT HOTEL BUILDING	KELLNER STREET	WESTDENE	BLOEMFONTEIN
MOAKIWE RESTAURANT	TAKE AWAYS	051	8751276	082		051	8751612		1 UNION AVENUE	NAVALSIG	BLOEMFONTEIN
MOCHACHOS	CHICKEN, FAST FOOD	051	4446792	082		051	4446792	IRENIOLA CENTRE	STAND 139, SELOSESHA ZONE 1	SELOSESHA	THABA NCHU
MOLWELE TAVERN	TAVERN	051	8732602	073		051	4446792		STAND 3095	THABA NCHU	THABA NCHU
MOONLIGHT TAVERN	TAVERN	051	4445101	073		051	4445507		THABA NCHU ZONE 1	THABA NCHU	THABA NCHU
MUGG & BEAN	COFFEE SHOP	051	4479909	051		051	4476273	916 RASSILE STREET	KELLNER STREET	SELOSESHA	THABA NCHU
MUSEUM COFFEE SHOP	COFFEE SHOP	051	4302206	?		051	4498217	NATIONAL MUSEUM	36 ALIWAL STREET	CBD	BLOEMFONTEIN
MYSTIC DOER	PUB	051	8751060	?		051	8751060		84 KELLNER STREET	WESTDENE	BLOEMFONTEIN
NALEDI SUN	CASINO	051	4476502	?		051	4460808	CALTEX HOUSE	3 BRIDGE STREET	SELOSESHA	THABA NCHU
NANDO'S CHICKEN LAND	TAKE AWAYS	051	4487485	?		051	4102410	WINDMILL CASINO	208 NELSON MANDELA DRIVE	WESTDENE	BLOEMFONTEIN
NANDO'S FAST FOOD	RESTAURANT	051	4487485	?		051	4402873	LOCH LOGAN WATERFRONT	CORNER JAN PIEREWIET AND CURIE AVENUE	PELLISIER	BLOEMFONTEIN
NEW METRO MOVIE CAFE	CINEMA	051	4472294	?		051	4472279	MEDENE CENTRE	HENRY STREET	WILLOWS	BLOEMFONTEIN
NEW YORK RESTAURANT	RESTAURANT	051	4472279	072	3874092	051	4472279	PRELLER SQUARE	90 SECOND AVENUE	WILLOWS	BLOEMFONTEIN
NICO'S PIZZA	PIZZA'S	051				051	4357400	PRELLER SQUARE	GRAAF REINETT STREET	DAN PIENAAR	BLOEMFONTEIN
NONKI'S TAVERN	TAVERN	051	8733040	073	5782733	051	4305523		STAND 2546, SELOSESHA UNIT 1	SELOSESHA	THABA NCHU
OBSERVATORY THEATRE	THEATRE	051		?		051	4305523		2ND AVENUE	SELOSESHA	THABA NCHU
OCEAN BASKET HENRY STREET	SEAFOOD	051	4308195	?		051	4309453	LOCH LOGAN WATERFRONT	2ND AVENUE	WESTDENE	BLOEMFONTEIN
OCEAN BASKET CORNER CURIE AVENUE	RESTAURANT	051		?		051	4102410	WINDMILL CASINO	CORNER JAN PIEREWIET AND CURIE AVENUE	PELLISIER	BLOEMFONTEIN
ODEION	THEATRE	051		?		051	4300122	UNIVERSITY OF THE FREE STATE	NELSON MANDELA DRIVE	BRANDWAG	BLOEMFONTEIN
OLIVES RESTAURANT	RESTAURANT	051	4300121	083	2542864	051	4300122	THE SHOWGROUNDS	17 PRES BRAND AND CURIE ROAD	CBD	BLOEMFONTEIN
OMEGA BAKERY & TAKE AWAYS	TAKE AWAYS	051	4308117	083	4119162	083	4308817	ARCADIA SHOP NO.9	ONZE RUST PLAAS	CBD	BLOEMFONTEIN
ONZE RUST LANDGOED	RESTAURANT	051	4308117	082	5777323	051	4438817		18A, 2ND AVENUE	BLOEMFONTEIN	BLOEMFONTEIN
OUMA SE KOMBUIS	TAKE AWAYS	051	4472294	?		051	4305523		2ND AVENUE	WESTDENE	BLOEMFONTEIN
PACIFICS	THEATRE	051		?		051	4442824		2ND AVENUE	WESTDENE	BLOEMFONTEIN
PANAROTTI'S	PIZZA & PASTA	051	4446513	?		051	4442824	MIMOSA MALL SHOP 24	MIMOSA MALL SHOP 24	WESTDENE	BLOEMFONTEIN
PANAROTTIE'S ITALIAN RESTAURANT	RESTAURANT	051	4102089	?		051	4102410	WINDMILL CASINO	WINDMILL CASINO	PELLISIER	BLOEMFONTEIN
PHILLIP SANDERS	RESTAURANT	051	4417611	?		051	4417547		CORNER JAN PIEREWIET AND CURIE AVENUE	MASELSPOORT	BLOEMFONTEIN
PIE CITY	TAKE AWAYS	051		051		051	4102410	CENTRAL PARK	MASELSPOORT ROAD	FICHARDT PARK	BLOEMFONTEIN
PIZZA PARLOR	FAST FOOD & PIZZA	051	5224667	?		051	5224597	UNIVERSITAS CENTRE	31A FICHARDT STREET	UNIVERSITAS	BLOEMFONTEIN
PIZZA SQUARE	FAST FOOD & PIZZA	051		051		?		41 PIZZA SQUARE	173 PRES PAUL KRUGER STREET	PELLISIER	BLOEMFONTEIN
PIZZAS HUIS	FAST FOOD	051	4444333	?		?		SELASSIER CENTRE	16 VOLKSPELE DRIVE	PELLISIER	BLOEMFONTEIN

NAME	TYPE	LCODE	LNUMBER	CCODE	CNUMBER	FCODE	FNUMBER	BUILDING	STREET	suburb	TOWN
PLANET PLAY	KIDS ENTERTAINMENT	051	4102069			051	4102410	WINDMILL CASINO	CORNER JAN PIEREWIET AND CURIE AVENUE	PELLISSIER	BLOEMFONTEIN
PRIMA PIATTI	ITALIAN RESTAURANT	051	4487882	?		051	4487388	LOCH LOGAN WATERFRONT	HENRY STREET	WILLOWS	BLOEMFONTEIN
PUB STOP	PUB	051	4459066			051	4494705		C/O CRICKET STREET / AND ALEXANDER STREET	WESTDENE	BLOEMFONTEIN
QUID STREET COFFEE SHOP	COFFEE SHOP	051	4308277	082	4411099	051	4308277		28A REID STREET	WESTDENE	BLOEMFONTEIN
RIDERS PUB & GRILL	PUB & GRILL	051				051	4305956		733 A ZASTRON STREET	WESTDENE	BLOEMFONTEIN
ROMANTI PIZZA	FAST FOOD & PIZZA	051	4446932	?		051	4445932	BRANDWAG CENTRE	C/O KELLNER & MELVILLE STREET	BRANDWAG	BLOEMFONTEIN
ROSES 2 DELI	COFFEE SHOP	051	4417878	?		051	4417806	RIVERSIDE 2	MASELSPOORT RD	RENOSTERSPRUIT	BLOEMFONTEIN
ROSIES BUFFET RESTAURANT	RESTAURANT	051				051	4102410	WINDMILL CASINO	CORNER JAN PIEREWIET AND CURIE AVENUE	PELLISSIER	BLOEMFONTEIN
SAND DU PLESSIS	THEATRE	051	4480122	?		051	4305623	?	2ND AVENUE	WESTDENE	BLOEMFONTEIN
SCHOEMANPARK GOLF CLUB	RESTAURANT	051		7		051	4487200	?	TIVABA NCHU ROAD	COMBROKE	BLOEMFONTEIN
SCOOTERS PIZZA	TAKE AWAYS	051		7		051	4301817	73 DIA HOUSE	2ND AVENUE	BLOEMFONTEIN	BLOEMFONTEIN
SECOND AVENUE CAFE	RESTAURANT	051	4459066	082	3715972	051		?	81 KELLNER STREET AND SECOND AVENUE	WESTDENE	BLOEMFONTEIN
SISTER KITCHEN	RESTAURANT			082	7340006	051	4440303		STAND 1815, SELOSESHA UNIT 1	TIVABA NKIHU	BLOEMFONTEIN
ST ELMOS	PIZZA AND PASTA RESTAURANT	051	4455023	073	7089958	051	4455024	DYNARO WALK XMALL	41 PARK ROAD	WILLOWS	BLOEMFONTEIN
STADIUM TAKE AWAY & FAST FOODS	TAKE AWAYS	051	4440986	082		051		LKISVIEW	JAN SPIES STREET	LANGENHOVENPARK	BLOEMFONTEIN
STEERS RESTAURANT	FAMILY RESTAURANT	051	4446775	7		7			39 PARK ROAD	WILLOWS	BLOEMFONTEIN
STERI PINKKOR	CINEMA	051		7		051	4443176	MIMOSA MALL	KELLNER STREET	WESTDENE	BLOEMFONTEIN
TEN PIN BOWLING AND POOL HALL	CASINO ENTERTAINMENT	051	4102069	7		051	4102410	WINDMILL CASINO	CORNER JAN PIEREWIET AND CURIE AVENUE	PELLISSIER	BLOEMFONTEIN
THE KELLER RESTAURANT	RESTAURANT	051	4392206	7		051	4487640		KELLNER STREET	WESTDENE	BLOEMFONTEIN
MYSTIC RIDER	NIGHT CLUB	051	4304139	7		051	4415821	?	NELSON MANDELA DRIVE, 2ND AVENUE	WESTDENE	BLOEMFONTEIN
THE SANDWICH SHOP	FAST FOOD	051		7		051	4474709	?	84 KELLNER STREET	WESTDENE	BLOEMFONTEIN
THE WINDMILL CASINO	CASINO	051	4102000	7		051	4102410	?	NO. 27, 2ND AVENUE	WESTDENE	BLOEMFONTEIN
TOM'S PLACE	RESTAURANT AND TAKE AWAYS	051	5640680	7		051	5840710	?	CORNER JAN PIEREWIET AND N1	PELLISSIER	BLOEMFONTEIN
TRAMMERBI PASTEUR HOSPITAL	COFFEE SHOP	051	5221028	7		051	5221028	PASTEUR HOSPITAL	TIERPOORT DAM ALONG N1	FEDREIRA	BLOEMFONTEIN
TRAMMERBI NELSON MANDELA DRIVE	COFFEE SHOP	051	4445398	7		051	4445396	COLLEGE SQUARE	64 PASTEUR HOSPITAL	HOSPITAL PARK	BLOEMFONTEIN
TRAMMERBI HENRY STREET	COFFEE SHOP	051	4487220	7		051	4487220	LOCH LOGAN WATERFRONT	NELSON MANDELA DRIVE	WESTDENE	BLOEMFONTEIN
TRAMMERBI EASTBURGER STREET	COFFEE SHOP	051		7		051	4484008	SANJAM PLAZA	HENRY STREET	WILLOWS	BLOEMFONTEIN
TRAMAGANANG TAVERN	TAVERN			082	5166908	051	8710940	?	C/O EASTBURGER & HENRY STREET	WESTDENE	BLOEMFONTEIN
TWO- ZERO BRAVO	FAST FOOD	051		7		051		?	STAND 1070, SELOSESHA	BELOSEGIA	THABA NCHU
UNITAS RESTAURANT	RESTAURANT	051	5226874	7		051	5226874	BP GARAGE	1 KORT STREET	FEDREIRA	BLOEMFONTEIN
VASCO'S	A LA CARTE RESTAURANT	051	4398194	7		051	4398194	PRELLER SQUARE	LOGEMANS STREET	UNIVERSITAS	BLOEMFONTEIN
VENESIA COFFEE BAR	COFFEE SHOP	051	4396194	7		051	4398194	PRELLER SQUARE	GRAAF REINETT STREET	DAN PIENAAR	BLOEMFONTEIN
WHISTLE STOP EEUFEES ROAD	SNACK BAR	051	4333976	7		051	4338875	STANOSA	11 ALWAL STREET	DAN PIENAAR	BLOEMFONTEIN
WHISTLE STOP HENRY-STREET	SNACK BAR	051	4477272	?		051	4477272	SHELL ULTRA CITY	EEUFEES ROAD	BAYSWATER	BLOEMFONTEIN
WIESSMDEN RESTAURANT	RESTAURANT	051		?		051	4517211	LOCH LOGAN WATERFRONT	HENRY STREET	WILLOWS	BLOEMFONTEIN
WILD BOARS SALOON	PUB	051		?					LIMOSINE STREET	BAINSVLEI	BLOEMFONTEIN
WIMPY GRAAF RENETT	FAST FOOD RESTAURANT	051	4381431	?		051	4397403	BFAM CENTRE LH PARK	BANKOPES ROAD	LANGENHOVEN PARK	BLOEMFONTEIN
WIMPY N1 HIGHWAY	FAST FOOD RESTAURANT	051	5225737	7		051	4381601	PRELLER SQUARE	GRAAF RENET	DAN PIENAAR	BLOEMFONTEIN
WIMPY VERENIGING DRIVE	FAST FOOD RESTAURANT	051		?		051		BLOEM ONE STOP	N1 HIGHWAY		BLOEMFONTEIN
WIMPY HENRY STREET	FAST FOOD RESTAURANT	051	4300943			?		CHECKERS HYPER	VERENSNING DRIVE	FLEURDAL	BLOEMFONTEIN
WIMPY NELSON MANDELA DRIVE	FAST FOOD RESTAURANT	051	4448133			051	4300942	SANJAM PLAZA	C/O EASTBURGER & HENRY STREET	WESTDENE	BLOEMFONTEIN
WIMPY KELLNER STREET	FAST FOOD RESTAURANT	051	4462502	?				CHECKERS CENTRE	NELSON MANDELA DRIVE	WESTDENE	BLOEMFONTEIN
WIMPY CURIE AVENUE	RESTAURANT	051		7		051		MIMOSA MALL	131 KELLNER STREET	BRANDWAG	BLOEMFONTEIN
WIMPY PRELLER PLAN	COFFEE SHOP	051				051	4102410	WINDMILL CASINO	CORNER JAN PIEREWIET AND CURIE AVENUE	PELLISSIER	BLOEMFONTEIN
WORKSHOP ROADSIDE CAFE	COFFEE SHOP	051	4472761					ART MUSEUM	HARRISMITH STREET	DAN PIENAAR	BLOEMFONTEIN
A LA CARTE RESTAURANT	A LA CARTE RESTAURANT	051	4472761						109 PRES REITZ STREET	WESTDENE	BLOEMFONTEIN

ANNEXURE 7

Summary of Events database

NAME	TYPE	LCODE	LNUMBER	CCODE	CNUMBER	BUILDING	STREET	SUBURB	TOWN	CTOWN
ROSE FESTIVAL	FESTIVAL	051	4055469/0911			MIMOSA MALL	KELLNER STREET	BRANDWAG	BLOEMFONTEIN	•
BLOEM SHOW	SHOW	051	4489894/5/6				CURIE AVENUE	CBD	BLOEMFONTEIN	•
MANGAUNG AFRICAN CULTURAL FESTIVAL (MACUFE)	FESTIVAL	051	4477771			BLOEMFONTEIN SHOW GROUNDS	CURIE AVENUE	CBD	BLOEMFONTEIN	•
VOLKSBLAD ARTS FESTIVAL	FESTIVAL	051	4047715	083	2748904	BLOEMFONTEIN THEATERS	C/O MARKGRAAFF & CHARLS STREET	CBD	BLOEMFONTEIN	•
CAROLS BY CANDLELIGHT	FESTIVAL	051	4485773			CAMPUS OF THE UNIVERSITY OF THE FREE STATE	NELSON MANDELA DRIVE	UNIVERSITAS	BLOEMFONTEIN	•
MUSIC IN THE GARDEN	MUSICAL EVENT	051	4485775			BOTANICAL GARDENS	RAYTON ROAD (R702, OFF DAN PIENAAR DRIVE)	RAYTON	BLOEMFONTEIN	•
BRIDAL SHOW	MUSICAL EVENT	051	4485775			BOTANICAL GARDENS	RAYTON ROAD (R702, OFF DAN PIENAAR DRIVE)	RAYTON	BLOEMFONTEIN	•
WHEELS, WINGS & OUTDOOR EXPO	SHOW	051	4485775			SAND DU PLESSIS	12 FIRST AVENUE	CBD	BLOEMFONTEIN	•
VUKA JAZZ FESTIVAL	EXPO	051	4485725	092	4532536	SAND DU PLESSIS		CBD	BLOEMFONTEIN	•
FOOD AND WINE FESTIVAL	FESTIVAL	051	4477771 Ext 2257	083	2791809	LOCH LOGAN WATERFRONT	ST ANDREW STREET	CBD	BLOEMFONTEIN	•
GLEN BOERDERY MUSEUM/FEES	FESTIVAL	051	4055489			CENTRAL UNIVERSITY OF TECHNOLOGY	C/O ST GEORGE STREET & PRES BRAND STREET	CBD	BLOEMFONTEIN	•
UOFS RAG	FESTIVAL	051	8611182							BLOEMFONTEIN
OFM HOMEMAKERS EXPO	STREET PROCESSION	051	4019111			SAND DU PLESSIS	12 FIRST AVENUE	GLEN FARM	BLOEMFONTEIN	•
OFM GETAWAY SHOW	EXPO	051	4301798			BLOEMFONTEIN SHOW GROUNDS	CURIE AVENUE	CBD	BLOEMFONTEIN	•
WAR BIRDS EXTRAVAGANZA	SHOW	011	7837030			BLOEMFONTEIN SHOW GROUNDS	CURIE AVENUE	CBD	BLOEMFONTEIN	•
CARS IN THE PARK (OFS VETERAN CAR CLUB)	SHOW	•	•	082	4123399	TEMPE AIRPORT		NEW TEMPE	BLOEMFONTEIN	•
MIELIE MEALIA (CARS IN THE PARK)	SHOW	•	•	072	1397512	OLD GREY'S SPORTS CLUB	PARK ROAD	PARKWEST	BLOEMFONTEIN	•
SOUTH AFRICAN NATIONAL ARABIAN HORSE CHAMPIONSHIPS	SHOW	051	4476152	•	•		LOCH LOGAN ISLAND		BLOEMFONTEIN	•
SUPER 14	RUGBY	051	4071700	•	•	BLOEMFONTEIN SHOW GROUNDS	CURIE AVENUE	CBD	BLOEMFONTEIN	•
STANDARD BANK CUP	CRICKET	051	4475715	•	•	VODACOM PARK	HORAK STREET	WILLOWS	BLOEMFONTEIN	•
PRO 20 SERIES	CRICKET	051	4475715	•	•	GOODYEAR PARK	HORAK STREET	WILLOWS	BLOEMFONTEIN	•
SUPERSPORT SERIES	CRICKET	051	4475716	•	•	GOODYEAR PARK	HORAK STREET	WILLOWS	BLOEMFONTEIN	•
PROTEA'S TESTS, ONE DAY AND PRO 20 INTERNATIONALS	CRICKET	051	4475715	•	•	GOODYEAR PARK	HORAK STREET	WILLOWS	BLOEMFONTEIN	•
SPRINGBOK RUGBY (INTERNATIONALS)	RUGBY	051	4071700	•	•	VODACOM PARK	HORAK STREET	WILLOWS	BLOEMFONTEIN	•
VODACOM CUP	RUGBY	051	4071700	•	•	VODACOM PARK	HORAK STREET	WILLOWS	BLOEMFONTEIN	•
ABSA CURRIE CUP	RUGBY	052	4071701	•	•	VODACOM PARK	HORAK STREET	WILLOWS	BLOEMFONTEIN	•
PREMIER SOCCER LEAGUE (psl)	SOCCER	051	4471193	•	•	BLOEMFONTEIN CLUB	8 ELIZABETH STREET	WILLOWS	BLOEMFONTEIN	•
ABSA CUP	SOCCER	051	4471183	•	•	BLOEMFONTEIN CLUB	8 ELIZABETH STREET	CBD	BLOEMFONTEIN	•

ANNEXURE 8

Summary of Recreation database

Routes

NAME	TYPE	LCODE	LNUMBER	BUILDING	STREET	SUBURB	TOWN
BLOEMFONTEIN ART ROUTE	DAY ROUTE	051	4058489	TOURIST CENTRE	60 PARK ROAD	WILLOWS	BLOEMFONTEIN
BLOEMFONTEIN HISTORICAL ROUTE	DAY ROUTE	051	4058489	TOURIST CENTRE	60 PARK ROAD	WILLOWS	BLOEMFONTEIN
THE ROSE WALK	DAY ROUTE	051	4058489	TOURIST CENTRE	60 PARK ROAD	WILLOWS	BLOEMFONTEIN
NALEDI TOURISM ROUTE	TOURISM ROUTE	051	4471362	TOURIST CENTRE	60 PARK ROAD	WILLOWS	BLOEMFONTEIN
MANGAUNG TOWNSHIP ROUTE	DAY ROUTE	051	4476352	ASTRA TRAVEL BUILDING	121 NELSON MANDELA STREET	WESTDENE	BLOEMFONTEIN
BBT HERITAGE ROUTE	TOURISM ROUTE	051	4471362	TOURIST CENTRE	60 PARK ROAD	WILLOWS	BLOEMFONTEIN
N8 TOURISM ROUTE	TOURISM ROUTE	051	4471362	TOURIST CENTRE	60 PARK ROAD	WILLOWS	BLOEMFONTEIN
MANGAUNG CULTURAL ROUTE	TOURISM ROUTE	051	4307974	AFRICAN JAZZ CLUB	AFRICAN ROAD	BATHO VILLAGE	MANGAUNG
TOLKIEN TRAIL	DAY ROUTE	051	4058489	TOURIST CENTRE	60 PARK ROAD	WILLOWS	BLOEMFONTEIN

ANNEXURE 9

Summary of Recreation database

NAME	TYPE	TYPES	TYPE1	LODGE	L.NUMBER	CODE	NUMBER	FISHING	FNUMBER	BUILDING	STREET	SUBURB	TOWN	CTOWN
ACTION CRICKET	CRICKET			051	4448517		051	4483293		RIVERVIEW	1 LOOP STREET	HILTON	BLOEMFONTEIN	
ACTION NETBALL	NETBALL			051	4448517		051	4483293		RIVERVIEW	1 LOOP STREET	HILTON	BLOEMFONTEIN	
AUGRABIES CROCODILE FARM	4 X 4 TRAILS	HIKING TRAILS		051	8811040	083	M01940				H1 90KM, 183KM FROM BLOEMFONTEIN	NAVAL HILL	BLOEMFONTEIN	ROTHARELO
ARTHUR NATHAN SWIMMING POOL	SWIMMING			051	4084482		051	4088441		INSTFONTEIN DAM	2KM FROM BLOEMFONTEIN ALONG R64		BLOEMFONTEIN	
BASE GAME LODGE	GAME VIEWING	HUNTERS		051	4311391		051	4311928		INSTFONTEIN DAM			BLOEMFONTEIN	
BLOEMFONTEIN AQUATIC SPORTS CLUB	RECREATION AND SPORT FACILITY			051	4425028		051			FIRST AVENUE	BASE NATHAN STREET, CRAIGHALL		BLOEMFONTEIN	
BLOEMFONTEIN BOWLING CLUB	BOWLING			051	4305064					TEMPE AIRPORT	FIRST AVENUE	RAYTON	BLOEMFONTEIN	
BLOEMFONTEIN FLYING CLUB	FLYING			051	4311921		051	4272024		TEMPE AIRPORT	BASE NATHAN STREET		BLOEMFONTEIN	
BLOEMFONTEIN FOOTBALL CLUB	FOOTBALL			051	4202417					TEMPE AIRPORT			BLOEMFONTEIN	
BLOEMFONTEIN GLIDING CLUB	FLYING			051	4311592					MASELSPORT ROAD			BLOEMFONTEIN	
BLOEMFONTEIN GOLF CLUB	GOLF			051	4259671		051	4481684		MASELSPORT ROAD	HEIDENBERG ROAD		BLOEMFONTEIN	
BLOEMFONTEIN SHOOTING CENTRE	SHOOTERS			051	4245823		051	4471405		TEMPE AIRPORT			BLOEMFONTEIN	
BLOEMFONTEIN SKY DIVING CLUB	PARACHUTING			051	4311412	083	2782520		051	4332788	MASELSPORT ROAD		BLOEMFONTEIN	
BLOEMFONTEIN TURF CLUB	HORSE RACING	GAMBLING		051	4284944		051	4291986		BULTFONTEIN ROAD R29	40KM FROM CBD		BLOEMFONTEIN	
CONTINENTAL AQUADRY POOL 8 X 4	4 X 4 TRAILS	HIKING TRAILS	SWIMMING	051	4281988		051	1646935		SOEFONTEIN NATURE RESERVE	40 KM SOUTH FROM BLOEMFONTEIN ON THE N	TIERPOORT	BLOEMFONTEIN	
THE OUDE KRAAL COUNTRY ESTATE	HORSE RIDING	HIKING TRAILS		051	4283509		051	4283293		IDEAL ROAD	MASELSPORT ROAD	RICHARDT PARK	BLOEMFONTEIN	
CHOMAK WALKING ROUTE	HIKING TRAILS			051	4333549		051			URBAN STREET		RICHARDT PARK	BLOEMFONTEIN	
DICKETON CENTRE	HORSE RIDING			051	4221707		051	4488672		NAVAL HILL		CBD	BLOEMFONTEIN	
ECHO/HOT/PARK SPORT CLUB AND GYM	GYM			051	4086124		051	4284101		RAYTON DRIVE		HAUWELBG	BLOEMFONTEIN	
MANOR GAME RESERVE	GAME VIEWING			051	4293530	083	1994629		051	4472206	SPRINGBOK PARK	HOGAK STREET	WILLOWS	BLOEMFONTEIN	
FREE STATE BOTANICAL GARDENS	WALKING			051	4472358	082			051			HOGAK DRIVE	WILLOWS	BLOEMFONTEIN	
FREE STATE CRICKET ACADEMY	CRICKET			051			051	4209944			HOGAK DRIVE	WILLOWS	BLOEMFONTEIN	
FREE STATE HOCKEY STADIUM	HOCKEY			051	4481311		051	4599819			HAPPY VALLEY	LANGENHOVEN PARK	BLOEMFONTEIN	
FREE STATE TENNIS	TENNIS			051	4369935						HAPPY VALLEY	LANGENHOVEN PARK	BLOEMFONTEIN	
HAPPY VALLEY WALKING ROUTE	HIKING TRAILS			051	4280029						HENRY STREET	WILLOWS	BLOEMFONTEIN	
KIPPIE WALKING ROUTE	CANOEING			051		083	2300316		051	4117542	LOCH LOGAN WATERFRONT	THABA NCHU	THABA NCHU	BLOEMFONTEIN	
LOCH LOGAN CANOE CLUB	CANOEING			051	4117348		051	4471683			12 KM FROM BLOEMFONTEIN, THABA NCHU	THABA NCHU	THABA NCHU	
MARIA MONOKA NATURE RESERVE	HORSE RIDING			051	4283905	082	1590006		051	4281986	ON THE BANKS OF THE MODDER RIVER, 70 KM FROM BLOEMFONTEIN ON THE N84	RAYTON	BLOEMFONTEIN	
MAMSPORT	MOUNTAIN BIKING			051	4241859		051	4281986		KIMAY STANNTON DRIVE	PANDPREST	BLOEMFONTEIN	
MEDIA LODGE	RECREATION AND SPORT FACILITY	FOOTBALL AND WAR GAMES		051	4441604		051	4447804		PARK ROAD	PELLISSIER	BLOEMFONTEIN	
OLIEN WALKING ROAD	HIKING TRAILS			051	4474609		051	4478873		FIRST AVENUE	PELLISSIER	BLOEMFONTEIN	
OLIEN WALKING ROAD	BOWLING			051	4446907					LOCH LOGAN WATERFRONT	WILLOWS	BLOEMFONTEIN	
UMANGA ROWING CLUB	BOWLING			051	4411911		051	4117542		VERHOERPLEX ROAD	WILLOWS	BLOEMFONTEIN	
PADDLE AND BUMPER BOATS	SWIMMING			051	4411011	082	2606418		051	4117547	ALUWAL STREET	BLOEMFONTEIN	
PNLAP SWIMMERS RESORT	SWIMMING			051	4271681		051	4471083		50KM EAST 36 KM BLOEMFONTEIN, JUST OFF THE BLOEMFONTEIN/THABA NCHU ROAD R844	WESTDENE	BLOEMFONTEIN	
RAMBLERS CLUB	BOWLING			044	1105185		051	4605099		ROAD STREET	RAYTON	BLOEMFONTEIN	
RUSTFONTEIN DAM NATURE RESERVE	WATER SPORTS	BIRD WATCHING	ANGLING	051	4472673		051			LANG STREET	RAYTON	BLOEMFONTEIN	
KAMANI RECREATION CLUB	RECREATION AND SPORT FACILITY			051	4447149		051			LANG STREET	RAYTON	BLOEMFONTEIN	
SCHOEMANSPARK BOWLS	BOWLING			051	4088316		051	4605517		LANG STREET	RAYTON	BLOEMFONTEIN	
SCHOEMANSPARK CRICKET	CRICKET			051	4448122		051	4481520		LANG STREET	RAYTON	BLOEMFONTEIN	
SCHOEMANSPARK RECREATION CLUB	RECREATION AND SPORT FACILITY			051	4293502		051	4280902		LOGSE FROM CBD	BLOEMFONTEIN	
SCHOEMANSPARK GOLF	GOLF	GAME VIEWING	HUNTING	051	4050416		051	4059656		JBULTFONTEIN ROAD R30	BLOEMFONTEIN	
SPRINGBOK NATURE RESERVE	HIKING TRAILS			051	4059111		051	4050606		PARK AVENUE	BLOEMFONTEIN	
STADIUM SWIMMING POOL	SWIMMING			051	4288861		051	4288961		TEMPE MILITARY BASE	BLOEMFONTEIN	
TEMPE GOLF CLUB	GOLF			051	3292131		051	4289941		TEMPE MILITARY BASE	BLOEMFONTEIN	
TEMPE GYM	GYM			051	3292131		051	3842739		GENERA SCHEEPERS AVENUE, DE WET	GENERAAL DE WET	BLOEMFONTEIN	
THREE SERVICES SPORTS CLUB	RECREATION AND SPORT FACILITY	HIKING	SWIMMING	051	4488833		051			35 KM OR H1 SOUTH	LANDPLACE	BLOEMFONTEIN	
TITAN PLACE	RESTON ACHING			051						UNIVERSITY OF THE FREE STATE	UNIVERSITAS	BLOEMFONTEIN	
TOP FIT HEALTH STUDIO	GYM			051	3221747		051	5227221		PICKHARDT PARK CENTRE	LE CLUB STREET	FICKHARDT PARK	BLOEMFONTEIN	
TRAINING EDGE, PICKHARDT PARK	GYM			051	4431810		051	4474411		37 PARK ROAD	WILLOWS	BLOEMFONTEIN	
TRAINING EDGE, WILLOWS	GYM			051	4413238					TEMPE	BLOEMFONTEIN	
VAN PATCKN SKYVE DAMME	HIKING TRAILS			051	4448650		051	4440494		SOEFONTEIN NATURE RESERVE	BULTFONTEIN ROAD R29, 40 KM FROM BLOEMFONTEIN	BLOEMFONTEIN	
WATER TRIALS	CANOEING			051	4311931		051	4311941		TEMPE AIRPORT	BLOEMFONTEIN	
WESTDENE AVIATION	FLYING												BLOEMFONTEIN	

ANNEXURE 10

Summary of Tourists agents, guides and organisations database

NAME	SUB	TYPE	LCODE	LNUMBER	CCODE	CNUMBER	BUILDING	STREET	SUBURB	TOWN	CTOWN
TAXI SAFARIS	agents	TOUR OPERATOR	051	4362544	082	4563783		53 KOMMANDANT SENEKAL STREET	DAN PIENAAR	BLOEMFONTEIN	
AFRICA GATEWAY TOURS & SAFARIS	agents	TOUR OPERATOR	051	4445145	082	9773310		17 MCHARDY STREET	BRANDWAG	BLOEMFONTEIN	
CROWN TRAVEL	agents	TRAVEL AGENT	051	4445445					BRANDWAG	BLOEMFONTEIN	
0861TRAVEL, BLOEMFONTEIN	agents	TRAVEL AGENT	051	4332114	084	7957005	MIMOSA MALL	KELLNER STREET	HELICON HEIGHTS	BLOEMFONTEIN	
AMERICAN INSTITUTE FOR FOREIGN STUDY (AU PAIR)	agents	TRAVEL AGENT	051	4334722	082	9230293	NORTHRIDGE MALL	EEUFEES ROAD	HELICON HEIGHTS	BLOEMFONTEIN	
ASTRA TRAVEL	agents	TRAVEL AGENT	051	4494722	082	7750920	ASTRA TRAVEL BUILDING	1ST AVENUE	WESTDENE	BLOEMFONTEIN	
BANGANI TRAVEL & TOURS	agents	TOUR OPERATOR	051	4478552	082	7750920		C/O NELSON MANDELA & 1ST AVE	WESTDENE	BLOEMFONTEIN	
CONNEX TRAVEL	agents	TRAVEL AGENT	051	4334336	093	3161098		4879 KOKOZELA STREET	BOCHABELA	BLOEMFONTEIN	
DISCOVER (SA) COACHES & TOURS	agents	TRAVEL AGENT	051	4367683	082	7041097		GRAAFF RENET STREET	DAN PIENAAR	MANGAUNG	BLOEMFONTEIN
ETNIQUE CONCORDE TRAVEL	agents	TOUR OPERATOR	051	4444622	072	4562937		139 KELLNER STREET	WESTDENE	BLOEMFONTEIN	
FLIGHT CENTRE	agents	TRAVEL AGENT	051	4062500	083	4612561	BAYSVILLAGE CENTRE	MILNER ROAD	WESTDENE	BLOEMFONTEIN	
KE RONA TOURS & EVENTS	agents	TRAVEL AGENT	051	4444602	083	3158182	MIMOSA MALL	KELLNER STREET	BAYSWATER	BLOEMFONTEIN	
JUMANJI AFRICAN TOUR BROKERS	agents	TOUR OPERATOR	051	4482932	073	1549434		193 NELSON MANDELA DRIVE	WESTDENE	BLOEMFONTEIN	
LEISURE VENTURES	agents	TRAVEL AGENT	051	4511789	082	4639405		NO.6 ABRAHAMSKRAAL ROAD	BENNIE	BLOEMFONTEIN	
MANGAUNG TOURIST INFORMATION OFFICE	agents	TOURISM INFORMATION CENTRE	051	5229457	083	2781766		31 VAN BLOEMENSTEIN STREET	BENNIE	BLOEMFONTEIN	BLOEMFONTEIN
MPA TOURS	agents	TOUR OPERATOR	051	4490786	072	2766874	TOURIST CENTRE	60 PARK ROAD	FICHARDT PARK	BLOEMFONTEIN	
MOTHEO DISTRICT INFORMATION OFFICE	tourism	TOURISM INFORMATION CENTRE	051	4471362			TOURIST CENTRE	98 ZASTRON STREET	WILLOWS	BLOEMFONTEIN	
POLOKO TOURS	agents	TOUR OPERATOR	051	4323646	082	8674947	TOURIST CENTRE	60 PARK ROAD	WILLOWS	BLOEMFONTEIN	
RENNIES TRAVEL	agents	TRAVEL AGENT	051	4302361	082	5538179		3550 NYOKONG ROAD	BOCHABELA	MANGAUNG	
SLABBERT COUNTRYWIDE TOURS	agents	TOUR OPERATOR	051	5722660	082	7003200		120N NELSON MANDELA DRIVE	WESTDENE	BLOEMFONTEIN	
STA TRAVEL	agents	TRAVEL AGENT	051	4446062			SHOP 19 MIMOSA MALL	18 STOFBERG STREET	UNIVERSITAS	BLOEMFONTEIN	
SURE YOUTH TRAVEL	agents	TRAVEL AGENT	051	4446623	072	4562937		KELLNER STREET	WESTDENE	BLOEMFONTEIN	
UNDER THE AFRICAN SKY SAFARIS	agents	TOUR OPERATOR	051	4421154	084	4900000		C/O KELLNER & DAN PIENAAR STREET	WESTDENE	BLOEMFONTEIN	
VUKA TOURS	agents	TOUR OPERATOR	051	4304422	082	9725927	HARVEY HIVE 62	4 JORDAAN AVENUE	WESTDENE	BLOEMFONTEIN	
WORKNS ADVENTURES	agents	TRAVEL AGENT	051	4360695	082	4666510		25 VERKENNER ROAD	ORANJESIG	BLOEMFONTEIN	
WORLDWIDE AGRI EXCHANGE	agents	TRAVEL AGENT	051					HARVEY ROAD	ORANJESIG	BLOEMFONTEIN	
AA TRAVEL GUIDES	agents	TRAVEL AGENT	051	7192000	051	7283036		28 HENRY SAGAN STREET	GENERAAL DE WET	BLOEMFONTEIN	
ASSOCIATION OF SOUTH AFRICAN TRAVEL AGENTS	tourism	ACCREDITATION ASSOCIATION	051	4922500	051	4387763		101 CHURCH STREET	SANDTON	JOHANNESBURG	
BACKPACKER TOURISM SOUTH AFRICA	tourism	TOURISM ASSOCIATION	021	4651888	21	4646828			NOORSTAD	JOHANNESBURG	
BED AND BREAKFAST ASSOCIATION OF SOUTH AFRICA	tourism	TOURISM ASSOCIATION	082	2962110	82	2962697					
DEPARTMENT OF ENVIRONMENTAL AFFAIRS AND TOURISM	tourism	NATIONAL DEPARTMENT OF TOURISM	012	3103911	12	3222476	FEDSURE FORUM BUILDING	DNR PRETORIUS AND VAN DER WALT	CENTURION	BLOEMFONTEIN	
FEDERATED HOSPITALITY ASSOCIATION OF SOUTH AFRICA	tourism	TOURISM ASSOCIATION	011	7080172	11	3222476	KARA HOUSE	41 SELOANE STREET	CBD	BLOEMFONTEIN	
FIELD GUIDES ASSOCIATION OF SOUTH AFRICA	tourism	TOURISM ASSOCIATION	011	7939296	11	7929957		UNIT 17,OFFICE PARK 203 DEYERSWALDE	BRYANSTON	BLOEMFONTEIN	
FREE STATE DEPARTMENT OF TOURISM, ENVIRONMENTAL & ECONOMIC AFFAIRS	tourism	PROVINCIAL DEPARTMENT OF TOURISM	066	1102165	51	4009983	BOJANALA BUILDING	34 MARKGRAAF STREET	NORTHCLIFF	JOHANNESBURG	
GUEST HOUSE ASSOCIATION OF SOUTH AFRICA	tourism	TOURISM ASSOCIATION	021	7620080	21	7973115		27 TENNANT ROAD	CBD	JOHANNESBURG	
MANGAUNG LOCAL MUNICIPALITY	tourism	LOCAL MUNICIPALITY	051	4005642	051	4095967		C/O MARKGRAAF & NELSON MANDELA DRIVE	KENILWORTH	CAPE TOWN	
MANGAUNG COMMUNITY TOURISM ASSOCIATION	tourism	TOURISM ASSOCIATION	051	4358415	051	4358415		10/02 ZULU STREET	CBD	BLOEMFONTEIN	
MANGAUNG TOURISM AUTHORITY	tourism	TOURISM ASSOCIATION	051	4058111	051	4471363	TOURIST CENTRE	60 PARK ROAD	ROOKLANDS	BLOEMFONTEIN	
MOTHEO DISTRICT MUNICIPALITY	tourism	DISTRICT MUNICIPALITY	051	4471362	051	4471363	TOURIST CENTRE	60 PARK ROAD	WILLOWS	BLOEMFONTEIN	
NATIONAL ACCOMMODATION ASSOCIATION OF SOUTH AFRICA	tourism	ACCOMMODATION ASSOCIATION	031	5613795	31	5613795		11 HILKEN DRIVE	WILLOWS	BLOEMFONTEIN	
NATIONAL HOTEL ASSOCIATION OF SOUTH AFRICA	tourism	TOURISM ASSOCIATION	011	7060172	11	3152422	KARA HOUSE	41 SELOANE STREET	UMHLANGA	DURBAN	
REGIONAL TOURISM ORGANISATION OF SOUTH AFRICA	tourism	TOURISM ORGANISATION	031		11			WATERFALL PARK	BRYANSTON	JOHANNESBURG	
SOUTH AFRICAN ASSOCIATION FOR THE CONFERENCE INDUSTRY	tourism	NATIONAL TOURISM ASSOCIATION	046	6243087	46	3601001		28 WESLEY	MIDRAND	JOHANNESBURG	
SOUTH AFRICAN MUSEUM ASSOCIATION	tourism	NATIONAL TOURISM ASSOCIATION	021	3901292	31			38 FABRIEL STREET	PORT ALFRED		
SOUTH AFRICAN NATIONAL PARKS	tourism	NATIONAL TOURISM ASSOCIATION	021	8721942	21	8722612	KARA HOUSE	42 SELOANE STREET	PAARL	WESTERN CAPE	
SOUTH AFRICAN RESTAURANT ASSOCIATION	tourism	NATIONAL TOURISM ORGANISATION	011	7080172	11			90 PROTEA ROAD	BRYANSTON	JOHANNESBURG	
SOUTHERN AFRICA TOURISM SERVICES ASSOCIATION	tourism	NATIONAL TOURISM ORGANISATION	011	8830000	11	8953001	BOJANALA HOUSE	343 SURREY AVENUE	CHISLEHURSTON	JOHANNESBURG	
TOURISM BUSINESS COUNCIL OF SOUTH AFRICA (TBCSA)	tourism	TOURISM ASSOCIATION	006	12722072	11	8967557	PETROB HOUSE	343 SURREY AVENUE	FERNDALE	JOHANNESBURG	
TOURISM GRADING COUNCIL	tourism	TOURISM ASSOCIATION	012	6547925	12	6547364	LERIBA LODGE	2 END AVENUE	CLUBVIEW	RANDBURG	
NGALO, STEMMER MOTLOKOANE	tourism	GRADING ASSOCIATION	011	8893109	66	0129403	BOJANALA HOUSE	90 PROTEA ROAD	CLUBVIEW	PRETORIA	JOHANNESBURG
JONES, JEREMY	guide	LOCAL TOUR GUIDE	011	4365550	051	4394101		3317 FREEDOM SQUARE	ROOKLANDS	JOHANNESBURG	
	guide	SPECIALIST TOUR GUIDE	051	8714725	051	0729321	FLAT H2 THABA NCHU SUN	THABA NCHU	BLOEMFONTEIN	BLOEMFONTEIN	

ANNEXURE 11

Summary of Medical database

NAME	TYPE	LCODE	LNUMBER	FCODE	FNUMBER	BUILDING	STREET	SUBURB	TOWN
MEDI CLINIC HOSPITAL	PRIVATE HOSPITAL	051	4046666	051	4046496		CNR KELLNER AND PARFITT STREET	WESTDENE	BLOEMFONTEIN
NATIONAL DISTRICT HOSPITAL	PUBLIC HOSPITAL	051	4039800	051	4039626		ROTH AVE	WILLOWS	BLOEMFONTEIN
NETCARE HOSPITAL	EMERGENCY SERVICE	051		051	4445499	NEXT TO UNIVERTAS HOSPITAL	LOGEMAN STREET	UNIVERSITAS	BLOEMFONTEIN
PASTEUR HOSPITAL & MEDOVS THEATRES	PRIVATE HOSPITAL	051	5226601	051	5224901		54 PASTEUR AVE	HOSPITAL PARK	BLOEMFONTEIN
PELONOMI HOSPITAL	PUBLIC HOSPITAL	051	4051911	051	4051770		DR BELCHER ROAD	HEIDEDAL	BLOEMFONTEIN
ROSEPARK HOSPITAL	PRIVATE HOSPITAL	051	5055111	051	5055995	FICHMED CENTRE	GUSTAV CRESCENT	FICHARDT P.	BLOEMFONTEIN
UNIVERSITAS HOSPITAL	PUBLIC HOSPITAL	051	4053911	051	4053634		1 LOGEMAN STREET	UNIVERSITAS	BLOEMFONTEIN
DR. MOROKA COMMUNITY HOSPITAL	PUBLIC HOSPITAL	051	8739800	051	8739885		2KM SOUTH ON THE MAIN ROAD FROM RAILWAY STATION	RATLOU	THABA NCHU
BOTSHABELO HOSPITAL	PUBLIC HOSPITAL	051	5330111	051	5341096		POLICESTATION ROAD	BLOCK AB	BOTSHABELO
FREE STATE PSYCHIATRIC COMPLEX	PUBLIC HOSPITAL	051	4079911	051	4079400		PRESIDENT AVE	ORANJESIG	BLOEMFONTEIN

Prepared by Kayamandi Development Services (Pty) Ltd

ANNEXURE 12

Summary of Educational database

NAME	TYPE	LCODE	LNUMBER	FCODE	FNUMBER	CCODE	CNUMBER	BUILDING	STREET	SUBURB	TOWN
ACADEMY OF HOTEL MANAGEMENT	HOTEL SCHOOL	051	4030600	051	4030699	082	5676533		17 MARKGRAAF STREET	LANGENHOVEN	BLOEMFONTEIN
BLOEMFONTEIN FASHION ACADEMY	FASHION ACADEMY	051	4306281	051	4306281	083	3065990		89 ALIWAL STREET	ARBORETUM	BLOEMFONTEIN
BOSTON COLLEGE	BUSINESS COLLEGE	051	4475700	051	4475700				62 ST ANDREWS	CBD	BLOEMFONTEIN
CENTRAL UNIVERSITY OF TECHNOLOGY, FREE STATE	UNIVERSITY	051	5073911	051	5073199				1 PARK ROAD	CBD	BLOEMFONTEIN
DAMELIN MANAGEMENT SCHOOL	MANAGEMENT SCHOOL	051	4472034	051	4472245	082	4192289		WEST BURGER & SHORT STREET	WESTDENE	BLOEMFONTEIN
EKSO UFS, EDUCATION FOR BUSINESS PEOPLE	TERTIARY	051	4019111	051	4019111				NELSON MANDELA DRIVE	UNIVERSITAS	BLOEMFONTEIN
FOOD &BEVERAGE INSTITUTE	CATERING INSTITUTE	051	4484980	051	4331861	086	1111324		LOCH LOGAN STREET TOP STORY NORTH	WATERFRONT	BLOEMFONTEIN
MOTHEO FET COLLEGE	PUBLIC COLLEGE	051	4481525	051	4470486				DOUGLAS STREET	CBD	BLOEMFONTEIN
MUSICON	MUSIC SCHOOL	051	4308831	051	4472127				1 FIRST AVENUE	WESTDENE	BLOEMFONTEIN
UNIVERSITY OF THE FREE STATE	UNIVERSITY	051	4019111	051	4019111				NELSON MANDELA DRIVE	UNIVERSITAS	BLOEMFONTEIN
BLOEMFONTEIN ART SCHOOL	ART SCHOOL	051	5073184	051	5073194				PRESIDENT BRAND STREET	CBD	BLOEMFONTEIN
GREY COLLEGE FOR BOYS	BOYS SCHOOL	051	4441724	051	4480376				J MEIRING STREET	BRANDWAG	BLOEMFONTEIN
ST ANDREWS BOYS SCHOOL	BOYS SCHOOL	051	4477832	051	4441612				DAN PIENAAR DRIVE	DAN PIENAAR	BLOEMFONTEIN
ST MICHAELS SCHOOL FOR GIRLS	GIRLS SCHOOL	051	4015700	051	4015703				111 KLERCK STREET	BRANDWAG	BLOEMFONTEIN
EUNICE GIRL'S SCHOOL	GIRLS SCHOOL	051	4441785	051	4441760				PARK STREET	PARKWES	BLOEMFONTEIN
ORANJE GIRL'S SCHOOL	GIRLS SCHOOL	051	4474681	051	4473083				7 HARRY SMITH	WESTDENE	BLOEMFONTEIN
BREBNER GIRL'S SCHOOL	GIRLS SCHOOL	051	4362287	051	4362608				LIMOUSIN STREET	HELICON HEIGHTS	BLOEMFONTEIN
GLEN AGRICULTURAL COLLEGE	COLLEGE	051	8611192	051	8611214				GIEL JOUBERT STREET	GLEN	BLOEMFONTEIN
ST BERNARD SENIOR SECONDARY SCHOOL	SCHOOL	051	4324432	051	4324167				3510 NYOAKONG ROAD	BOCHABELO	BLOEMFONTEIN

ANNEXURE B

2006-02-22

Dear Sir/Madam

SURVEY REGARDING THE DEVELOPMENT OF A STRATEGIC MARKETING PLAN FOR THE MANGAUNG TOURISM AREA

Mr MS Monyane, a student for the Masters Degree in Technology: Marketing, is currently collecting data to develop a strategic marketing plan for the Mangaung tourism area.

The survey is limited to institutions that are stakeholders in the tourism industry in the Mangaung area. He needs the inputs of all stakeholders and therefore your co-operation is of VITAL IMPORTANCE for the success of the study.

It would be appreciated if you would be so kind as to complete the enclosed questionnaire and return it in the postage paid envelope, provided herewith, within fourteen days of receipt. All information provided by yourself will be treated as STRICTLY CONFIDENTIAL and you will be furnished with a free copy of the report on completion of the study.

Should you experience any problems in completing the questionnaire you are requested to contact Mr MS Monyane at:

Telephone Work: 012 5210667
Cell: 0722505637
E-mail: monyanems@tut.ac.za

Thank you in anticipation for your co-operation.

Your sincerely

MR AP ROUX
SENIOR LECTURER: MARKETING
STUDY LEADER

Telephone Work: 051 5073225
E-mail: proux@cut.ac.za

ANNEXURE C

THE DEVELOPMENT OF A STRATEGIC MARKETING PLAN FOR THE MANGAUNG TOURISM AREA STAKEHOLDERS QUESTIONNAIRE

SECTION A

1. BUSINESS INFORMATION

1.1 Company name ………………………………………….

1.2 Company address ………………………………………
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1.3 Company telephone number ………………………………………

1.4 Tourism sector of the company

Accommodation	
Transport	
Travel agency	
Tour operator	
Recreation	
Education	
Other, please specify	

1.5 Area of operation

Botshabelo	
Thaba Nchu	
Mangaung	
Bloemfontein	

1.6 Number of staff

0-5		6-10		11- 20		21 –100		101+	

1.7 Is your company graded by South African Tourism Grading Council

Yes		No	

1.8 Number of years in operation

0-5		6-10		11- 20		21+	

SECTION B

2. STRATEGIC PLANNING ISSUES

1. Identify the critical success factors for an area like Mangaung to be
   successful in terms of tourism:

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2. Identify the strengths of Mangaung Tourism area:

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3. Identify the weaknesses of Mangaung Tourism area:

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4. Identify the opportunities facing the Mangaung Tourism area:

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5. Identify the threats facing the Mangaung Tourism area:

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6. Identify the two major competitors for the Mangaung Tourism area:

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7. Which one do you regard as the most important competitor?

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8. Describe the most important competitor in terms of its strengths, weaknesses and competitive advantages?

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Strengths:

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Weaknesses:

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Competitive advantages:

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9. How should the Mangaung Tourism area be positioned in the market?

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10. How will you describe the major priorities for the Mangaung Tourism area
for the term 2008-2010?

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THANK YOU FOR YOUR CO-OPERATION.

ANNEXURE D

THE DEVELOPMENT OF A STRATEGIC MARKETING PLAN FOR THE MANGAUNG TOURISM AREA BOARD OF DIRECTORS QUESTIONNAIRE

SECTION A

1. STRATEGIC PLANNING ISSUES

1. Identify the objectives and goals for Mangaung Tourism area.

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2. Describe how do you view the mission statement of Mangaung Tourism area.

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3. Identify the target markets of Mangaung Tourism area.

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4. How does the Mangaung Tourism brand name differentiate it from the
   Competitors?

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SECTION B

2. MARKETING PLANNING ISSUES

5. Which strategy for pricing should be implemented in the Mangaung
   Tourism area?

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6. Describe the standards of services offered in the Mangaung tourism area.

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7. How should Mangaung Tourism products be distributed to the market in your opinion?

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8. How should Mangaung Tourism be promoted in your opinion under the following factors?

Personal selling

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Advertising…………………………………………………………………………………………
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Sales promotion

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<u>THANK YOU</u>.

ANNEXURE E

ATTENDANCE REGISTER

DATE : 14 SEPTEMBER 2006

MANGAUNG FORUMS

NAMES	COMPANY / ASSOCIATION	E-MAIL	CELL / TEL NO	FAX NO
Piso Mosetlhe	Design Quest	designquest@webmail.co.za	089 350 8070	051 448 6317
Lebohang Mofeli	Kerann Tours & Events	keronatravolina@kbompaunt	073 1549 4154	051 448 2952
Rabana Katoanr	Rabana Communication	Rab.com@axbmail.co.za	083 4848 414	051 482 6546
Thandi Tshabalala	Rabang Communicatha	rab.com@webmail.co.za	083 583 7305	051 432 6546
Adele Vermeulen	Letsatsi Game Lodge	letsatsireservations@intekom.co.za	072 333 1063	051 444 5674
Rikus Bergh	ECLIP Futura	AFRIKEMYRES@MWEB.CO.ZA	073 444 1960	051-447 0587
Eddie Look	Landbank	e.look@Landbank.co.za	0845866316.	051 447771g.
Keke Legoso	MANGAUNG Tourism	bcca@itekon.co.za	082 82 82 034	447-3064
Tumisang Gumede	Sportzone	tumzen@webmail.co.za	072 251 1110	
M.J. MALIHDI	EXACT TRANSPORT CC		0893 237 4572	—
Tum Myambi	Motheo District Muni	tumm@motheo.co.za	082 482 0622	447 1363
Selina Mq844	Machine training & dev	Recruitment02@sessa.gou.za	0764 586869	051 4090263
Ed Valashiya	Valas Tour		072 1184788	
Mac Mqwathi	Specialized Security Services	sts-za@mweb.co.za	089 337 1870	051-448 9166

ATTENDANCE REGISTER

MANGAUNG FORUMS

DATE : 14 SEPTEMBER 2006

NAMES	COMPANY / ASSOCIATION	E-MAIL	CELL / TEL NO	FAX NO
BRADY MELK	COCA COLA	bmelk@ccfortune.co.za	(051) 400 2200	086 513 4011
NEIL AUSTIN	COCA COLA	Baustin@ccfortune.co.za	(051) 400 2200	(051) 435 3512
C. PETERSEN	STANDARD BANK	Charley.Pedersen@standardbank.co.za	051-404 3901	051-404 3929
Tiene Grobe	Old Mutual	tieniecoetzee@oldmutual.com	505 200R	505 2233
BERNIE VORSTER	BARLOWORLD NISSAN	bernievorster@barloworldmotor.com	448 9401	448 1382
Willem van Huyssteen	SAB	willem.vanhuyssteen@za-sabmiller.com	08292173774	4356105
BUYELWA KHETHELO	MANGAUNG C.T. FORUM	buyelwa@ananzi.co.za	0843281217	4355418
NEO MASOENG	Menzeunzeng Trading		0847100079	
Serome Ram, Klay	Ohlse Trading		0728653783	051 8732452

ANNEXURE F

MANGAUNG TOURISM
CUSTOMER SATISFACTION SURVEY

Dear Visitor

Mangaung Tourism takes quality service delivery and customer satisfaction as a priority. Please help Mangaung Tourism to continue to deliver quality service by answering the questions below. Your input will be given serious attention.

Thank you for your co-operation.

General Manager
Mangaung Tourism

SECTION A

Organisation information

1.1 Name of business: ………………………………………….

1.2 Address of business: ………………………………………….
………………………………………….
………………………………………….
………………………………………….

1.3 Sector of business:

Accommodation	
Education	
Recreation	
Tour operator	
Travel agency	
Transport	
Other	

1.4 Area of operation:

Bloemfontein	
Botshabelo	
Mangaung	
Thaba Nchu	

1.5 Number of days stayed:

0-5		6-10		11- 20		21 –100	101- 200+	

1.6 Is this your first visit to Mangaung?

Yes		No	

1.7 Number of people visiting:

1-5		6-10		11- 20		21 –100	

SECTION B

Please tick the appropriate box:

1. Rate the staff attitude at the tourism products you visited in Mangaung:

Very poor		Poor		Fair		Very good	Excellent	

2. What was your impression of the physical surroundings of the Mangaung area?

Very poor		Poor		Fair		Very good	Excellent	

3. Give an honest opinion of the services you received in general:

Very poor		Poor		Fair		Very good	Excellent	

4. What do you think of our location?

Very poor		Poor		Fair		Very good	Excellent	

5. Would you like to come back again?

Yes		No	

5.1. Reasons

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6. How do you rate the pricing in the Mangaung area?

Very poor		Poor		Fair		Very good	Excellent	

6.1 Recommendations:

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7. How do you rate Mangaung tourism area products in general?

Very poor		Poor		Fair		Very good	Excellent	

7.1 Recommendations:

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THANK YOU FOR YOUR CO-OPERATION

Declaration of Language Editing

To Whom It May Concern

Electronic language editing of M Tech: Marketing dissertation:

This is to certify that I carried out language editing of the
Magister Technologiae: Marketing thesis:

THE DEVELOPMENT OF A STRATEGIC MARKETING PLAN FOR THE MANGAUNG TOURISM AREA

By

MALEFANE STEPHEN MONYANE

I focused on language issues, including expression, grammar, tenses, subject-verb agreement, consistency of spelling, the avoidance of casual language and the improvement of formal academic language usage. I checked for consistency in headings, the use of names and terminology. The list of references was alphabetised, checked against the text and the bibliographic style was standardised to conform to the Harvard reference style.

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