

**EVALUATION OF EKZNW'S ECO-CULTURAL TOURISM
MARKETING STRATEGY FOR THE UKHAHLAMBA
DRAKENSBERG PARK WORLD HERITAGE SITE**

By

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Submitted in partial fulfilment of the requirements for the degree of
Master of Environment and Development (Protected Area Management)

at the

School of Environmental Sciences

Faculty of Science and Agriculture,

University of KwaZulu-Natal (Pietermaritzburg)

2011

Abstract

The uKhahlamba Drakensberg Park World Heritage Site has significant value including the natural and cultural value such as the production of water, the wilderness and eco-cultural tourism. Situated in the Province of KwaZulu-Natal, in South Africa, this 242 813 ha Park is a national and international asset. There are marketing activities carried out by Ezemvelo KwaZulu-Natal Wildlife (EKZNW); however they are not park specific. Ezemvelo KwaZulu-Natal Wildlife has a number of parks under their management and uKhahlamba Drakensberg Park World Heritage Site is one of these parks.

The main aim of this study was to evaluate EKZNW's current eco-cultural tourism marketing strategy for the uKhahlamba Drakensberg Park World Heritage Site. This was done by achieving the following objectives:-

1. determine the ideal generic marketing strategy for a Protected Area specifically a World Heritage Site;
2. establish the current status of Ezemvelo KwaZulu-Natal Wildlife marketing strategy for the uKhahlamba Drakensberg Park World Heritage Site;
3. conduct a comparative analysis between the ideal strategy and Ezemvelo KwaZulu-Natal Wildlife's actual strategy for uKhahlamba Drakensberg Park World Heritage Site;
4. based on the comparative analysis, recommend marketing interventions to improve the eco-cultural tourism marketing strategy for uKhahlamba Drakensberg Park World Heritage Site.

To fulfil these objectives the research methods used were qualitative in nature because of the type of investigation. Methods used to collect information included a literature review, structured and semi-structured face-to-face interviews, discussions, conducting a SWOT analysis and secondary data analysis. The SWOT analysis was formulated from the interviews but not as a workshop and it was part of the analysis.

The results of the study show that the respondents have concerns regarding the marketing of the Site. Currently there is no written eco-cultural marketing strategy for uKhahlamba Drakensberg Park World Heritage Site. However marketing activities limited as they are, are being performed

on an *ad hoc* basis. The Ezemvelo KwaZulu-Natal Wildlife marketing department is too small (three staff) to handle the marketing of all Ezemvelo KwaZulu-Natal Wildlife parks, resulting in uKhahlamba Drakensberg Park World Heritage Site not getting the marketing attention it deserves as an international icon. Scarce resources coupled with internal conflicts, lack of marketing skills, insufficient gathering of marketing information and no external or industry marketing alliances has resulted in minimum marketing exposure for the uKhahlamba Drakensberg Park World Heritage Site.

The study concluded that marketing integration and collaboration with all relevant stakeholders is needed. Marketing objectives for the uKhahlamba Drakensberg Park World Heritage Site must be developed. Better profiling of current and potential visitors to maximise revenues is a priority for better future marketing decisions. The brand identity has to be maximised through collaboration with stakeholders and staff. This will lead to sustainable marketing of the Site which takes into consideration biodiversity conservation. This ensures that conservation objectives are not compromised.

DECLARATION

I Philisiwe Juliet Mchunu declare that

- (i) The research reported in this dissertation, except where otherwise indicated, is my original work.
- (ii) This dissertation has not been submitted for any degree or examination at any other university.
- (iii) This dissertation does not contain other persons' data, pictures, graphs or other information, unless specifically acknowledged as being sourced from other researchers.
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Signed:

Date

Acknowledgements

Writing this thesis has been the most significant academic challenge I have ever faced. Without the support, patience and guidance of the following people, this study would not have been completed. It is to them that I owe my deepest gratitude.

- Dr Mark Dent, my supervisor, for guiding and motivating me through his wisdom, knowledge and commitment to the highest of standards. He is responsible for the successful completion of my thesis. His untiring effort, commitment, encouragement, guidance and support helped me greatly in the understanding and writing of the thesis. His ability to identify the discontinuities in my writing continuously challenged my thinking. His critical passion and intellectual standard encouraged me to keep raising the level of my own work. If it were not for his insightful comments, this thesis would not have been readable.
- Duncan Hay, my co-supervisor, for insight shared and steadfast encouragement whilst writing this thesis.
- Oscar Mthimkhulu, my mentor and friend, for inspiring this study. I am sincerely grateful for his guidance and support since the initial stages of my studies to the final phase which enabled me to develop an understanding of the subject Protected Area Management. He did not know me before this study and yet made himself available so I can have as much exposure to this field as possible. He has flown the EKZNW's flag very high indeed.
- Alfons Mosimane, my friend, for all the sleepless nights he endured while helping me with my research. He taught me to always celebrate even the smallest of achievements during my research and for that I am truly grateful.
- I am greatly appreciative of all the staff at EKZNW and to all the UDP WHS tourism and community stakeholders who took part in my survey. Without their input, this thesis would not have been possible to complete.
- I am indebted to DUT for financing my studies. Their untiring effort in encouraging the staff to pursue academic growth is truly commendable.
- I thank my husband for his support from the inception of my research, for taking care of our home and children while I spent countless days and nights in my office in pursuit of this degree. I could not have prayed for a better partner.
- I am extremely thankful and grateful to my family, especially my daughter Luphiwe, who at eight weeks old bore the brunt of mother and child bonding when I sacrificed time to start my studies. I am deeply sorry for so much time we spent apart.

I offer my regards and blessings to all my friends, family, colleagues and all of those who supported me in any respect during the completion of my thesis. Last but in no way the least, I want to thank my God for answered prayers, for giving me strength to go on despite my whole being wanting to give up and throw in the towel, for giving me grace towards my studies. Thank you so much my gracious Lord and King.

TABLE OF CONTENTS

Page

LIST OF ABBREVIATIONS.....	x
LIST OF TABLES	xi
LIST OF FIGURES	xii
CHAPTER 1	1
INTRODUCTION.....	1
1.1 Introduction	1
1.2 Study Area Location and Description	1
1.3 Eco-cultural Tourism Product in UDP WHS	3
1.4 Significance of Study	5
1.5 Problem Statement	6
1.6 Overall Objective	7
1.6.1 Specific Objectives	7
1.7 Research Process and Method.....	7
1.8 Delimitations and Limitations.....	9
1.9 Chapter Sequence.....	10
CHAPTER 2	12
LITERATURE REVIEW.....	12
2.1 Introduction	12
2.2. South Africa’s Responsible Tourism Guidelines	12
2.3. Marketing Protected Areas.....	13
2.3.1 Protected Areas, Heritage Sites and Ecotourism	16
2.3.2 Protected Area Marketing.....	17
2.4 Elements of an Ideal Marketing Strategy	18

2.4.1	Marketing Expectations, Issues and Goals	18
2.4.2	Market Information Gathering.....	19
2.4.3	Segmentation, Targeting and Positioning	21
2.4.4	Definition of Marketing Mix and Destination Mix.....	24
2.4.5	Branding.....	25
2.4.6	Destination and Collaborative Marketing	27
2.5	Summary	30
CHAPTER 3		33
RESEARCH METHODS		33
3.1	Introduction	33
3.2	Research Framework.....	34
3.3	Qualitative Research Methods	36
3.4	Data Collection.....	37
3.4.1	Structured Face to face Interviews.....	39
3.4.2	Semi-structured Face-to-face Interviews	39
3.4.3	Group Discussions	40
3.4.4	SWOT Analysis	40
3.4.5	Secondary Data Analysis	41
3.5	Data Analysis and Interpretation.....	41
3.6	Summary	42
CHAPTER 4		43
RESULTS AND ANALYSIS: ECO-CULTURAL MARKETING STRATEGY		43
4.1	Introduction	43
4.2	Mapping of Interview Questions to the Themes	43
4.3	Marketing Expectations, Issues, and Goals.....	49
4.4	Market Information Gathering	54
4.5	Segmentation, Targeting, Positioning	57

4.6	Marketing and Destination Mix	59
4.7	Branding.....	63
4.8	Destination and Collaborative Marketing	65
4.9	Summary	66
CHAPTER 5		67
DISCUSSION: ECO-CULTURAL MARKETING STRATEGY		67
5.1	Introduction	67
5.2	Marketing Expectations, Issues, and Goals.....	67
5.3	Market Information Gathering	70
5.4	Segmentation, Targeting, Positioning	75
5.4.1	Definition of Current Segments	75
5.4.2	Untapped Desired Segments	77
5.5	Marketing and Destination Mix	78
5.5.1	Marketing Mix	78
5.5.1.1	Product.....	78
5.5.1.2	Place.....	79
5.5.1.3	Price.....	80
5.5.1.4	Promotion.....	81
5.5.1.5	People.....	81
5.5.1.6	Partnership.....	83
5.5.1.7	Packaging and Programming.....	84
5.5.2	Destination Mix	84
5.6	Branding.....	85
5.7	Destination and Collaborative Marketing	88
5.8	Summary	89

CHAPTER 6	90
CONCLUSIONS AND RECOMMENDATIONS.....	90
6.1 Introduction	90
6.2 Conclusions	91
6.2.1 Marketing expectations, issues, and goals	91
6.2.2 Market information gathering	92
6.2.3 Segmentation, Targeting, Positioning.....	92
6.2.4 Marketing and destination mix	93
6.2.5 Branding.....	94
6.2.6 Destination and Collaborative Marketing.....	94
6.3 Recommendations	94
6.3.1 Marketing expectations, issues, and goals	94
6.3.2 Market knowledge gathering	95
6.3.3 Segmentation, Targeting, Positioning.....	96
6.3.4 Marketing and destination mix	96
6.3.5 Branding.....	97
6.3.6 Destination and Collaborative Marketing.....	98
6.4 Improvements to the Methodology	98
6.5 Further Research	98
CHAPTER 7	100
REFERENCES.....	100
APPENDICES.....	106
Appendix A: UDP WHS MARKETING INTERVIEW SCHEDULE	106
Appendix B: UDP WHS SWOT ANALYSIS	112

LIST OF ABBREVIATIONS

CDP – Concept Development Plan

EKZNW – Ezemvelo KwaZulu-Natal Wildlife

ICOSMOS – International Council on Monuments and Sites

IMP – Integrated Management Plan

KZNTA – KwaZulu-Natal Tourism Authority

MDTP – Maloti Drakensberg Transfrontier Park

N3TC – N3 Toll Concession

NGO – Non Government Organisation

PA – Protected Area

PEST – Political, Economical, Socio-cultural, and Technological factors

SMART – Specific, Measurable, Actionable, Reliable and Time-framed

SWOT – Strengths, Weaknesses, Opportunities and Threats

UDP WHS – uKhahlamba Drakensberg Park World Heritage Site

UNESCO – United Nations Educational, Scientific and Cultural Organisation

WHC – World Heritage Centre

WHS – World Heritage Site

LIST OF TABLES

Table 1: Surveyed Target Population.....	38
Table 2: Mapping of Interview Questions to Themes.....	44
Table 3: Gap Analysis - Marketing Expectations, Issues, and Goals.....	50
Table 4: Gap Analysis - Market Information Gathering.....	54
Table 5: Gap Analysis – Segmentation, Targeting and Positioning.....	58
Table 6: Gap Analysis - Marketing and Destination Mix.....	59
Table 7: Gap Analysis – Branding.....	63
Table 8: Gap Analysis – Destination and Collaborative Marketing.....	65

LIST OF FIGURES

Figure 1: Proclaimed Protected Area Components of UDP WHS.....	2
Figure 2: Research Process Outline.....	8
Figure 3: The collaborative Strategic Tourism Marketing Planning Process.....	29
Figure 4: Research Process Outline.....	35
Figure 5: UDP WHS Visitor Numbers 2003-2008.....	71
Figure 6: UDP WHS Accommodation Revenues.....	72

CHAPTER 1

INTRODUCTION

1.1 Introduction

The aim of this chapter is to introduce key aspects of this research. The study area is uKhahlamba Drakensberg Park World Heritage Site (UDP WHS). The chapter delves into the following: eco-cultural tourism product in UDP WHS; the significance of study; problem statement; objectives of the study; and research methods. It will highlight the site's outstanding universal value within the tourism industry and the importance of marketing such a site for socio-economic benefits for the site and for South Africa. This Protected Area (PA) has significant values including the natural and cultural values, the production of water, the wilderness and the eco-cultural tourism. PAs provide significant potential for economic and recreational development within many countries, including South Africa. The importance of the study, the overall objective and specific objectives will be discussed in this section. The process that the study took will be illustrated to show how the research was carried out.

1.2 Study Area Location and Description

UDP WHS is situated in the Province of KwaZulu-Natal, in South Africa. The Park is part of the Drakensberg – an inland mountain range in South Eastern Africa. UDP WHS received its World Heritage Status in 2000 for both its cultural and natural value (Kruger & Crowson, 2004).

The Park shares its borders with three provinces of South Africa (KZN, Free State and Eastern Cape). The Park's western boundary forms the international boundary with Lesotho and this has resulted in the formation of the Maloti Drakensberg Transfrontier Project (MDTP), also referred to as Maloti-Drakensberg Transfrontier Conservation and Development Area. The establishment of MDTP is believed to be significant in terms of achieving conservation goals while effectively institutionalising synergy and collaborative conservation management between the two countries' protected areas (EKZNW, 2005). The proclaimed area of the Park is 242 813 ha and consists of 15 components (See, Figure 1) of Protected Areas (EKZNW, 2005).



Figure 1: Proclaimed Protected Area Components of UDP WHS Source: EKZNW (2005)

The UDP WHS is a national and international asset because of its unique cultural and natural values. The Site is one of 23 properties in the world listed as a World Heritage Site of dual significance (EKZNW, 2005). The other significant values of the Park are its water production, wilderness and eco-cultural tourism. The Site is managed by the provincial conservation body Ezemvelo KwaZulu Natal Wildlife (EKZNW). The total size of the UDP WHS is 242 813 ha and proximately 1.4% of this (3 452 ha) has been transformed by both alien plant infestation and infrastructural development (Kruger & Crowson, 2004).

UDP WHS is endowed with biodiversity of local, national and international significance. It has exceptional cultural and natural attractions that make it a domestic and international tourist destination. UDP WHS protects a high level of endemic and globally threatened species, especially birds and plants. Its landscape is exceptionally unique and it contains many caves and rock shelters with the largest and most concentrated group of San rock paintings (World Heritage Centre (WHC, 2009).

Culturally, the mountains were significant for the Zulu people and later the Voortrekkers. However these mountains were more central to the San or Bushman who were the most ancient of all inhabitants. For thousands of years, the San hunter-gatherers who are the indigenous inhabitants of Southern Africa (Encounter South Africa, 2009) lived in these mountains and skilfully painted the walls of the caves with a wealth of paintings that shed light on both the day-to-day and spiritual rituals of their ancient lives.

Tourism in UDP WHS is therefore based primarily on its unique natural and cultural heritage. UDP WHS provides a major destination for eco-cultural tourism in South Africa. This site attracts domestic and international tourists mostly interested in mountain climbing, hiking, birding, fishing and those who want to enjoy its scenic beauty.

1.3 Eco-cultural Tourism Product in UDP WHS

Proper planning for the UDP WHS has mainly been for conservation purposes as the objectives of PAs are to preserve the natural places using various management techniques for such sites. More therefore has to be done in terms of marketing strategy to promote tourism for this site. As

a natural and cultural site the type of tourism suited for UDP WHS is eco-cultural tourism which can ensure economic benefits to the local people and stakeholders while preserving the site for future generations. The UDP WHS is the only PA of its kind in South Africa and as such deserves a well-integrated plan to market its tourism aspect to its full potential while its biodiversity is protected. This requires a responsible marketing plan which will take into consideration the PA objectives and ensure sustainability of the site.

As one of the largest Protected Areas in the country and South Africa's only World Heritage Site listed for dual status, the Park is a cornerstone of the country's tourism industry and a major eco-cultural destination for visitors. The Park's eco-cultural tourism product consists of: six hatted camps at Royal Natal National Park (Thendele), Cathedral Peak (Didima), Injisuthi, Giants Castle, Kamberg and Lotheni providing 180 accommodation units with 536 beds. There are six campgrounds in the Park located at Royal Natal National Park (Mahai), Cathedral Peak Monks Cowl, Injisuthi Highmoor, Lotheni, Cobham and Garden Castle, these inclusively have 182 campsites accommodating up to 1 692 visitors per night. There are also picnic sites and ablution facilities at most of these camps. The Park has two licensed restaurants, one at Giants Castle and the other is located at Didima. Didima has the state of the art wedding venue and conference centre. Most camps have a curio shop. There are five overnight huts in Giants Castle, rock art interpretative centres at Didima (Cathedral Peak) and Kamberg and Vulture Hide at Giant's Castle. All of this suggests that there is a good mix and supply of accommodation in UDP WHS. Three of the camps namely Didima, Kamberg and Giants Castle have a three star grading for accommodation enabling them to compete with the private sector accommodation (EKZNW, 2005).

The Park's activities include fly fishing, horse riding, mountain, rock and ice climbing, abseiling, mountain biking and 1 550 km of hiking trails and paths (EKZNW, 2005). The Park hosts Mountain Bike Challenges and trail running as well.

As much as marketing of the World Heritage Site to a certain extent is the same as marketing of any destination, there are unique aspects which make marketing such sites a specific proposition. World Heritage status brings with it a responsibility to protect the Site and this responsibility is very complex and has to be shared amongst a range of partner organisations.

Corporate plans state the need to establish a more market-driven strategic direction, develop strategic partnerships with other key stakeholders, more actively promote commercial outdoor recreation and tourism opportunities, and make conscious efforts to provide clear parameters for public use of natural resources (Wearing & Archer, 2001). Marketing strategies are now recognised by Protected Area management agencies as central to developing broad public support for the long-term protection of environmental and cultural integrity (Wearing et.al., 2007).

1.4 Significance of Study

Protected Areas (PAs) need to ensure a balance between the protection of sites and tourism activities through destination planning and management (Machin, 2002; Russo, 2002; Zhang, 2002; and Frochot & Hughes, 2000), interpretation of attractions (Dewar, 2000 and Grimwade & Carter, 2000), pricing issues (Garrod & Fyall, 2000), and community development (Dicks, 2000; Grimwade & Carter, 2000; and Ashworth & Turnbridge, 1990). All this will contribute to a more sustainable tourist destination and conservation of the UDP WHS in line with the World Heritage Convention Act (1999) and the White Paper on The Development and Promotion of Tourism in South Africa (1996).

Hall and McArthur (1996) argue that marketing has to be recognised as a tool to achieving protected area management aims and objectives and not just conducted for its own sake. Archer and Wearing (2002) enforce that marketing expertise within park management agencies at the planning and policy levels has been either non-existent or scarcely applied, and political and resource realities have also been factors in the reluctance to integrate marketing strategies within park management. It is only recently that marketing has begun to establish itself as a valued concept in the management of PAs (Wearing & Bowden, 1999).

The purpose of the study therefore sought to bridge the gap between EKZNW's actual eco-cultural tourism marketing strategy and the ideal strategy through the evaluation of the eco-cultural tourism markets. The study sought to find out amongst other things, which markets visit UDP WHS for eco-cultural activities, when they visit, how UDP WHS is marketed as a tourist destination and why they choose this as their destination, and the strategies for ensuring that

marketing interventions are successful. Also to identify any marketing opportunities and challenges that need to be addressed in terms of marketing strategic planning for UDP WHS. The findings of this study will inform and make recommendations towards future UDP WHS marketing strategy.

This study focused on the evaluation of eco-cultural tourism in the UDP WHS. The aim is to contribute to the body of knowledge fulfilling one of the objectives of UDP WHS's Integrated Management Plan (IMP) 2006-2011 which is to "sustainably develop the Park to fully realize its eco-cultural tourism potential" (Ezemvelo KwaZulu-Natal Wildlife (EKZNW, 2005). Of the eleven management objectives for the Park, the eco-cultural marketing strategy is rated as the number one priority (EKZNW, 2005).

1.5 Problem Statement

UDP WHS experience poor eco-cultural marketing activities as a result of lack of a documented marketing strategy for the Park. This negatively affects effective promotion by the agency in charge which is EKZNW. Though there are marketing activities done by EKZNW, they are not (region or product) specific as they just market EKZNW as an organisation and do not concentrate on marketing specifically the UDP WHS as a Park. This is of great concern, considering the fact that the UDP WHS is an international asset.

EKZNW has three main documented management plans for the UDP WHS namely; the Integrated Management Plan (IMP), the Concept Development Plan (CDP) and the Business Plan but none of these plans point towards a strategic marketing direction for the Park. UDP WHS needs to have a site specific marketing strategy in order to experience improvement of current eco-cultural products and services. This improvement coupled with acceptable pricing structures, marketing and overall enhancement of the quality of tourist experience will cause UDP WHS to realise its full tourism potential as (aimed by or as stated in) the IMP and the CDP.

1.6 Overall Objective

The main objective is to evaluate the current eco-cultural tourism marketing strategy for the UDP WHS.

1.6.1 Specific Objectives

1. Determine the ideal generic marketing strategy for a Protected Area specifically a World Heritage Site.
2. Establish the current status of EKZNW's marketing strategy for the UDP WHS.
3. Conduct a comparative analysis between the ideal strategy and EKZNW's actual strategy for UDP WHS.
4. Based on the comparative analysis, recommend marketing interventions to improve the eco-cultural tourism marketing strategy for UDP WHS.

1.7 Research Process and Method

The process as outlined in Figure 2 was followed to fulfil the research objectives. The four research objectives were to be met through the compilation of an ideal marketing strategy based on literature. Literature was reviewed on the six main marketing strategic elements: Marketing expectations and goals; marketing knowledge; segmentation, targeting and positioning; marketing and destination mix; destination and collaborative marketing; and branding.

The same elements were used as the framework to establish the current status of the marketing strategy and then to compare it against the ideal marketing strategy. Once these gaps were identified, they were used to recommend ways that will help EKZNW improve its eco-cultural marketing strategy for UDP WHS. Figure 2 shows the research process flow.

Research process outline

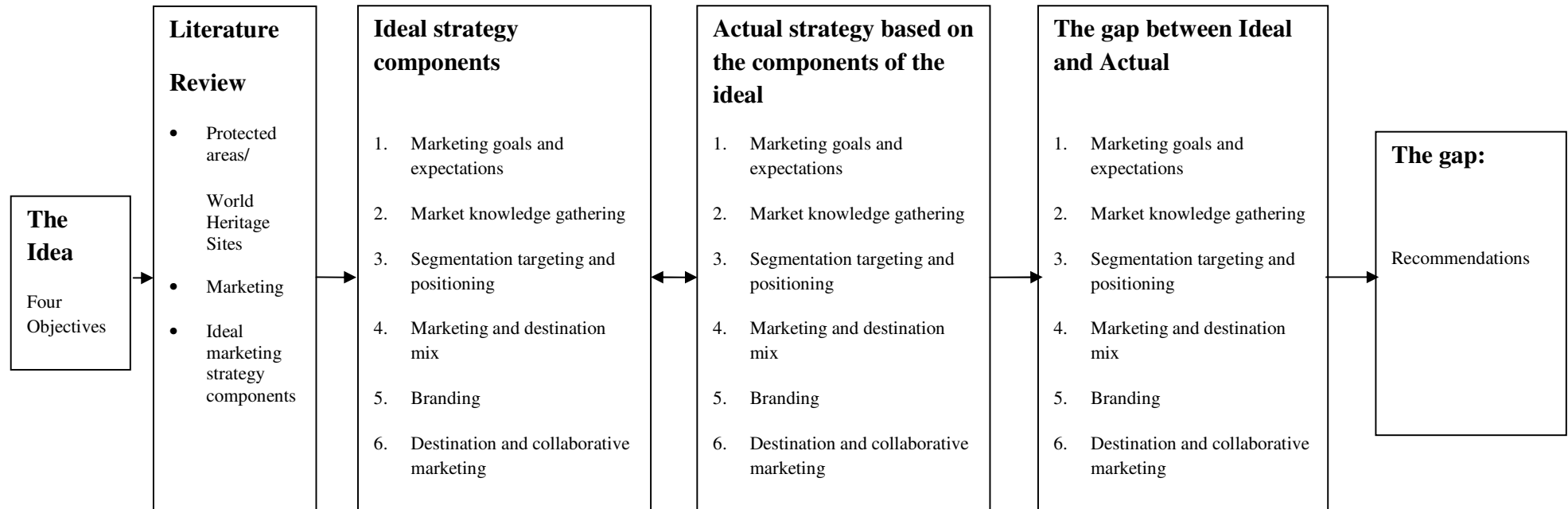


Figure 2 Research process outline

The research is qualitative in nature, it is exploratory and is used to diagnose the marketing challenges that EKZNW may be faced with in marketing the UDP WHS. The reason for using this method was to understand the target population's opinions and attitudes about marketing and especially eco-cultural tourism marketing. The qualitative research methods that were used for data collection were structured face-to-face interviews, semi-structured face-to-face interviews, group discussion, SWOT analysis (derived from interviews) and secondary data analysis. These were conducted personally. The information was collected through taking of notes during the interviews.

The study sampled 27 individuals, 13(48%) were EKZNW employees while 14(52%) were tourism stakeholders in UDP WHS. Meetings were held with different EKZNW staff including the CEO, the marketing staff, and hospitality managers for different camps within UDP WHS. 77% of the interviews with EKZNW staff constituted of hospitality managers and 23% was the marketing personnel. The respondents at EKZNW were chosen based on rank. Since this is a marketing study, it had to engage the EKZNW staff whose work profile was that of marketing. The tourism stakeholders on the other hand, were chosen based on area of business operation (UDP WHS) and availability. The questionnaire was used and this had different themes that the study focused on, some themes were discussed in more detail than others (see appendix A). The interpretation of data is based on these themes, any gaps identified by the study are discussed and recommendations made.

1.8 Delimitations and Limitations

The study focuses on the UDP WHS and how it is marketed by EKZNW. Due to the nature of the strategic process and the fact that it has to be organisation based, EKZNW head office staff dealing with marketing and those managing hospitality in the UDP WHS camps were interviewed. Some EKZNW stakeholders within the Park were also interviewed to get further dimension to the researchers own understanding. This was because of the fact that the marketing strategy would also affect businesses within the UDP WHS.

While the study will add value towards the strategy formulation for the UDP WHS by EKZNW, the intention is not to formulate a strategy but to address the gaps that might exist within the

current marketing approach. The study will only make recommendations on how those might be filled. The study does not attempt to look at other aspects that may make the strategy a success or a failure such as policy issues, implementation and resources. These will eventually come into the discussion but they are not the specific focus of this research.

1.9 Chapter Sequence

The study comprises of six chapters. The first chapter gives the setting and the importance of the study area both nationally and internationally. The eco-cultural product in UDP WHS is described along with the economic importance of such a product. In this chapter the importance of the study is discussed and the problem statement is explained as the need to have a working marketing strategy therefore the objectives of the study are centred on evaluating the current marketing activities by the EKZNW. Methodology is briefly mentioned as are the study's limitations.

The second chapter is based on reviewing literature that is available on PAs and WHS marketing, destination marketing and strategic marketing in general. The responsible tourism guidelines are reviewed and linked to PAs where eco-cultural tourism is more affluent hence the study looks primarily at the strategy for this type of tourism. The ideal marketing strategy components which form the base of this study are reviewed in detail using various literatures.

The third chapter is an important component which essentially maps out the methods that have been used to carry out this study. It gives a description of how the data to address the research problem was collected and analysed to draw conclusions. It explains the research tools used in detail and the choices for using those tools for this particular study.

Chapter 4 presents the results based on the four objectives of the study: to determine the ideal generic marketing strategy for a Protected Area specifically a World Heritage Site and to establish the current status of EKZNW's marketing strategy for the UDP WHS; conduct a comparative analysis between the ideal strategy and EKZNW's actual strategy for UDP WHS; and recommend marketing interventions to improve the eco-cultural tourism marketing strategy

for UDP WHS. The results are then analysed through the comparison and identification of any gaps that might exist between the ideal strategy and that of EKZNW.

Chapter 5 discusses the results in relation to the study's framework and themes. The EKZNW's current eco-cultural tourism marketing strategy is analysed and interpreted based on the generic ideal marketing strategy which was developed from literature.

The final chapter communicates conclusions and recommendations of the study. Recommendations are based on the issues that have been identified as causing a gap in the eco-cultural tourism marketing strategy.

CHAPTER

2

LITERATURE REVIEW

2.1 Introduction

The objective of the chapter is to provide support based on literature of how a marketing strategy is formulated, the processes in between strategy formulation and implementation e.g effective allocation and coordination of marketing resources and activities, identification of threats to avoid and opportunities to pursue. The topics that are being reviewed for this study are the responsible tourism industry guidelines; marketing and its relevancy to protected areas; destination and collaborative marketing; and the components of an ideal strategy: marketing expectations, definition of current segments, market knowledge gathering, segmentation, targeting and positioning, marketing mix, destination mix, and branding, marketing communications strategy and marketing implementation.

2.2. South Africa's Responsible Tourism Guidelines

According to the White Paper on The Development and Promotion of Tourism in South Africa (1996:5) ecotourism is "*environmentally and socially responsible travel to natural or near natural areas that promotes conservation, has low visitor impact and provides for beneficially active socio-economic involvement of local people*". Ecotourism must benefit and improve the lives of local people. The successful development of ecotourism, according to South African Tourism Institute (2004), is related to three main issues: it is a reaction against the negative impacts of mass tourism; developed in response to the growth of tourism based on natural environment attractions and it is an outcome of growing understanding and acceptance of the importance of environmental conservation and sustainable development.

Ecotourism is the fastest growing segment of tourism in South Africa (Tourism KwaZulu-Natal, 2008). Activities include visits to natural areas, photography, bird watching, botanical studies, hiking and mountaineering. The main pillars on which ecotourism is built are promotion and enhancement of the natural and cultural environment, effective planning and sustainable

management of the environment, and participation by the local community (South African Tourism Institute, 2004).

The White Paper on The Development and Promotion of Tourism in South Africa (1996:5 defines cultural tourism as “*cultural aspects which are of interest to the visitor and can be marketed as such, including the customs and traditions of people, their heritage, history and way of life*”. Cultural tourism is therefore based on the mosaic of places, traditions, art forms, celebrations and experiences that reflect the diversity and character of the area and its people (Sinha, n.d). Eco-cultural tourism is a concept in which ecological and cultural aspects of landscape are combined to create a site for tourists (Sinha, n.d). This is clearly experienced in the case of UDP WHS which is rich in culture and ecological systems.

2.3. Marketing Protected Areas

A large proportion of literature in the following sub-areas is based mostly on general marketing and not protected areas as such; this is due to insufficient literature on marketing protected areas as a specific discipline. The generic principles of marketing in each of these sub-areas do apply to PAs. The sub-areas are: Protected areas, heritage sites and ecotourism; Protected area marketing; marketing strategy; marketing expectations, issues and goals; marketing information gathering; segmentation, targeting and positioning; marketing mix and destination mix; branding; and destination and collaborative marketing.

The study therefore used a variety of literature in tourism and destination marketing as the area being studied is a destination attracting visitors and thus requiring strategic marketing management. This review will help towards fulfilling the objectives of this study including recommending marketing interventions to more effectively reach the consumer and increase tourism revenues within UDP WHS.

Timothy & Boyd (2003) express that marketing of heritage places should not necessarily entail attempts to increase visitor numbers through advertising. Instead it means that managers of these areas have opportunities to target certain consumers and control their visits, while improving conservation standards (Pearson & Sullivan, 1995). This could possibly be done through an

effective collaborative approach with other service providers who provide a similar product to the WHS (nature lovers).

For the purpose and in the context of this study, a marketing strategy is 'a written plan which combines product development, promotion, distribution, and pricing approach, it identifies the organisation's marketing goals, and explains how they will be achieved within a stated timeframe' (Business dictionary, 2009). Marketing strategy determines the choice of target market segment, positioning, marketing mix, and allocation of resources. The marketing strategy needs to address the six principles of the International Cultural Tourism Charter (ICOSMOS, 1999). The ICOSMOS (1999) principles include the following: conservation providing responsible and well managed opportunities for the host community, and that visitor experience must include understanding community's heritage and culture; The relationship between Heritage Places and Tourism must be managed sustainably for future generations; Conservation and Tourism Planning should ensure quality Visitor Experience; Host communities should be part of conservation and tourism plans; the host community must benefit from both tourism and conservation; and Tourism promotion activities should protect the Natural and Cultural Heritage aspects.

A full understanding of marketing is needed before any successful marketing is experienced. The goals and objectives that the UDP WHS marketing strategy seeks to achieve are those in terms of ecotourism and cultural tourism. It is important to note that UDP WHS cannot be all things to all people, decisions are required on the target audience and experience being created. It is important also to understand the competitive advantage UDP WHS has over other heritage attractions in South Africa in terms of accessibility, market segments, facilities, marketing strategies, cost and maintenance. Information about who the target market is for the eco-cultural activities is of importance. This strategy does not seek to cover all aspects of tourism in this area but will make reference to the tourism industry in general.

The UDP WHS marketing strategy should explain the current desired eco-cultural tourism market segments. This eco-cultural marketing would analyse the current UDP WHS markets and specifically ecotourism and cultural tourism oriented visitors. Market segmentation helps identify the most valuable target market meaning that certain aspects of a market will not be

directly targeted by UDP WHS. This would allow EKZNW to concentrate their resources on the segment of the target market they want to serve. The eco-cultural marketing strategy would address the current performance in terms of growth in international and domestic market and opportunities available.

Knowing the customer, knowing the competitors and understanding the tourism market are vital in developing a sound eco-cultural tourism marketing strategy. Because UDP WHS is a tourism destination, another aspect to evaluate is collaborative marketing and branding. As such relationship marketing must be evident in the marketing strategy showing the interrelatedness of the UDP WHS as a tourism product to the entire tourism system involving all stakeholders who can make or break the tourism appeal in this area. Relationship marketing helps with the issues of confusion as to who markets or promotes parks to current and potential visitors; it ensures the protection of ecological integrity and of cultural and historical heritage; and it addresses the use of different brands in marketing and promotion (Wearing *et.al.*, 2007). Moutinho (2000) urges that marketing be the entire organisation's responsibility. This will help with encouraging positive image of the organisation and that of the entire World Heritage Site.

In terms of branding attention needs to be given to positioning and image. Positioning refers to what a brand stands for in the minds of its customers and prospects, relative to its competition in terms of benefits and promises (Leask & Fyall, 2006).

The marketing mix is a well-known concept in marketing involving the traditional four Ps of product, place, promotion and price. In a case of a World Heritage Site, firstly the product is the natural and or cultural aspect which has been deemed of international status. This product exists not as a result of tourism, but rather as a by-product of the need to protect and conserve these areas for current and future generations (Leask & Fyall, 2006). Secondly, the place is concerned with distribution and the channels by which consumers are given access to the product. Consumers are brought to the World Heritage Site through advertisement and selling site as iconic and must visit places. Thirdly, promotion is the communication process which entails giving the consumers benefits in visiting the World Heritage Site. Tourism businesses within the vicinity of destination have used the World Heritage Site brand to promote their ventures and sell

their experience as part of the wider opportunity the World Heritage Site region offers. Lastly, price must be set to satisfy both customers and meet profit objectives.

Marketing evaluation is useful in determining whether strategies were successful in terms of initial marketing objectives. An effective method to carry this out in World Heritage Sites is measuring usage and establishing visitor profiles. The purpose of marketing evaluation is to assist managers in understanding issues such as marketing effectiveness, image creation/enhancement, and the number of people who visited the heritage site based on advertising efforts and media usage (Timothy & Boyd, 2003).

2.3.1 Protected Areas, Heritage Sites and Ecotourism

There are some 878 World Heritage Sites (WHS) throughout the globe (WHC, 2009). These sites are used by destination marketers as honey pots attractions ensuring that WHS draw maximum attention to an overall destination (International Council on Monuments and Sites (ICOMOS), 1993). WHSs are fast becoming a tool for national tourism marketing campaigns (Li *et al.*, 2008). For most countries the declaration a world heritage site means an increase in inbound tourist flows. As such heritage is regarded as one of the fastest growing components of tourism (Herbert, 2001). Drost (1996) affirms that designating areas as World Heritage Sites strengthens international and national heritage identity in the public's mind. World Heritage Sites represent unique culture and natural beauty of the country in which they are located and symbolise their country globally (Shackley, 1998).

World Heritage and other international listings tell tourists that a site exists and is worth visiting (Buckley, 2002). In the eco-cultural tourism market WHS is the ultimate brand, a concept more related to unique and possibly rare heritage. Protected Areas are increasingly attractive to tourists, and some raise significant funds through tourism (Font *et al.*, 2004). Most of the benefits of tourism in Protected Areas include funding methods e.g. through entrance fees, user fees, concessions and leases, direct operation of commercial activities, taxes, volunteers and donations. Funds generated through Protected Areas need to be utilised to create long lasting tourism benefits and ensure sustainability of natural resources from which tourism also benefits.

Well planned and managed tourism is a viable method of contributing to economic advancement, improvement in quality of life and natural and cultural heritage protection (McCool et al., 2007).

2.3.2 Protected Area Marketing

Marketing is “*a social and managerial process by which individuals and groups obtain what they need and want through creating and exchanging products and values with others*” (Kotler & Armstrong, 1999:3). Marketing seeks to maximize sales of products, develop new products and new markets and to provide quality of services necessary to satisfy consumers. The marketing concept in a case of Protected Areas has come to incorporate outcomes other than profit, such as long-term environmental conservation, improved customer awareness, appreciation of the natural environment, delivery of societal benefits, and customer satisfaction (Wearing *et al.*, 2007).

Thus the main function of marketing in a Protected Area (PA) is to keep in contact with the organisation’s stakeholders, their needs, and develop products that meet their needs through communication programmes (Hall & McArthur, 1996). Tourism marketing in Protected Areas has a relatively new history and integrating marketing into Protected Area planning is important especially with the decrease in financial support that Protected Areas receive (Halpenny, 2007). UNESCO’s guidance on tourism in World Heritage Sites, stresses that any marketing development takes into account the wider management responsibilities associated with the World Heritage Site (UNESCO, 2002). This highlights and expresses the importance of integration in Protected Area management.

As mentioned above a balance is needed between the protection of these sites and their consumption as tourist attractions. Many efforts to bring this balance have been made, from tourism development in heritage destinations (Boyd, 2002 and Garrod & Fyall, 2000) to their marketing (Nuryanti, 1996). World Heritage Sites are treasures to all people and should be open to the public and tourists while being protected for future generations (Li *et al.*, 2008). For this reason it is imperative that there be a proper marketing strategy for World Heritage Sites which will ensure sustainability, protection and continuous revenue benefits.

2.4 Elements of an Ideal Marketing Strategy

This study used the elements of an ideal marketing strategy including marketing expectations, definition of current segments, market information gathering, segmentation, targeting and positioning, marketing mix, destination mix, branding, and destination and collaborative marketing to evaluate the EKZNW's eco-cultural marketing strategy. The ideal strategy was compiled using literature and compared to the actual EKZNW's marketing strategy and for UDP WHS. The better and the more well defined marketing strategy will come from filling any existing gaps that would have been identified by the study.

World Heritage Sites are often the destination icons used to market destinations. As leading attractions in many parts of the world, their success in terms of tourism is not often the result of their designation as having the World Heritage Status, but rather other factors, such as how the sites are marketed and how accessible they are to the market place (Shackley, 1998).

2.4.1 Marketing Expectations, Issues and Goals

Bushell & Eagles (2007) identify the following as questions needing to be answered in terms of expectations, issues and goals:-

- where does the Park agency want to be in terms of marketing;
- what visitor segments are there, and which does the Park agency want to serve;
- and which Park visitors does the park agency most want to attract?

Because Park offerings are often intangible, the visitor frequently relies on the recommendations of others to a greater extent this is known as word-of-mouth advertising (George, 2004). People talking to each other is more powerful than advertising or any other form of promotion and customers are only likely to recommend a service if they have experienced a consistent value for money and quality experience (George, 2004).

Marketing is concerned with achieving goals, these might not be about making money although some organisations may aim to increase their market share (George, 2004). Other organisations such as EKZNW aim to conserve the natural environment and are not only concerned with

getting numbers through their gates. George (2004) defines goals as ‘the organisation’s primary intended accomplishments’. Usually these are along the main lines of what the organisation exists for. To determine progress, goals need objectives acting as a yardstick.

Morrison (2002) describes marketing objectives as a measurable goal that a hospitality or travel organisation attempts to achieve for a target market within a specific time period. Strategic marketing objectives should reflect what the organisation aspires to, however, these must be realistic to improve the organisation’s market position. The SMART concept is a basic criterion for setting objectives. It suggests that if marketing objectives are not specific, measurable, achievable, realistic and time constrained then they are not to be referred to as such (George, 2004; Kotler & Armstrong, 2006).

No marketing strategy will be successful unless it is implemented and controlled effectively (Jooste *et. al.*, 2009). There are a number of issues that need to be addressed in order for a strategy to succeed. These in terms of strategy implementation include resource allocation, organisational culture, strategic leadership, organisational structure, organisational systems, rewards and incentives, policies and procedures, and best practices and continuous improvements (Jooste *et. al.*, 2009). In terms of general marketing the issues may include partnerships, communications, strategic planning, market research, promotion and branding (Kotler, 2000; Kotler & Armstrong, 2006). Issues however vary from one organisation to the next.

2.4.2 Market Information Gathering

George (2004) defines the market as a group of consumers (actual or potential) with similar needs or wants. Saayman (2006) says that the word “market” can be used in four different ways: firstly the actual and potential number of tourists of a destination that the tourists can afford and are willing to pay for; secondly the income that is a result of tourist’s spending on tourism offerings; thirdly the geographical area that attracts the tourists and generates tourism; and lastly the demand for certain destination.

Market knowledge management is the effective leverage of information and experience in the acquisition, development and retention of a profitable customer portfolio (Jooste *et. al.*, 2009).

Market information gathering is an important part of Park management and planning. Understanding the current and potential consumers and communication with all stakeholders is one area in which Park agencies need to devote increased resources (Bushell & Eagles, 2007). The authors further emphasise that greater understanding of consumers leads to more effective and efficient provision of visitor services, as well as enhanced cultural and natural heritage management.

To analyse a destination, one needs to present its structure and dynamics of the industry in which it competes as well as its attractiveness for future investment (Saayman, 2006). In analysing the market there Saayman (2006) and Du Plessis *et. al.* (2005) suggests seven dimensions that need to be studied are: actual and potential market size; market growth; market profitability; cost structures; distribution systems; trends and developments; and key success factors.

In terms of competitor analysis, it is implemented to determine where the destination stands in comparison to its competition. This helps the destination know and understand its competitive advantage in order for it to be fully exploited. Porter (1985) identified 2 basic types of competitive advantages: cost advantage and differentiated advantage. A competitive advantage exists when a destination or organisation is able to deliver the same benefits as competitors but at a lower cost (cost advantage), or deliver benefits that exceed those of competing products (differentiated advantage) (*ibid.*). Thus a competitive advantage enables the destination to create superior value for its customers and superior profits for itself. The analysis should be of both the products and services within destination and the destination as a whole. Saayman (2006) suggests that the following factors be evaluated: natural tourist resources; cultural and historical resources; infrastructure; means of access and internal transportation facilities; and attractions and facilities.

Knowledge of consumers is another aspect on which the organisations should collect information, on a regular basis. This provides the organisation with information on how they are meeting consumer needs and wants and helps determine the organisation's position in the market place. Information that must be collected according to George (2004) is concerned with: which products or services do consumers choose, when, how much, at what prices and how often; how the consumers hear about the products or services; where they buy products or services (direct or

through an intermediary); and how they feel after they purchase and consume the product or service.

Organisations are influenced by forces outside their industry that may affect not only a particular organisation within the industry, but also the industry as a whole (Bennett *et. al.*, 2005; Jobber, 2007). This usually calls for environmental scanning which according to Bennett *et. al.* (2005) is a systematic method used by an organisation to study and forecast external forces not under the control of an organisation or its industry. Environmental scanning interprets what is happening in an organisation's current environment in order to forecast developments in its future environment. This analysis includes the internal and external environment of an organisation and uses the analysis tool PEST for political, economical, socio-cultural and technological factors (Bennett *et al.*, 2005; George, 2008; and Du Plessis *et al.*, 2005).

2.4.3 Segmentation, Targeting and Positioning

A segment consists of a group of consumers who share one or more similar characteristics which cause them to have similar tourism offering needs (George, 2004; Morgan, 1996). Current segments refer to a group of consumers whom the organisation is basing all their marketing efforts towards. Untapped desired segments are those groups with which the organisation wishes to target but have not been able to for any reason. Saayman (2006) suggests that before even starting to segment, the overall market has to be defined in general and this helps to narrow down the market by eliminating inappropriate or unwanted groups.

Sound marketing starts with the identification of consumer needs and ends with the delivery of a need-satisfying service or product to the consumer (Bennett *et. al.*, 2005). The very existence and success thereof of an organisation depends on whether the needs and wants of consumers are being met or not. If not the consumers will take their business elsewhere.

Segmentation, targeting and positioning are a series of steps that are interrelated. It is about building the right relationships with the right customers (Kotler & Armstrong, 2006). The first step is segmentation involving dividing the market up into groups of people with similar needs and wants. The second step is targeting which looks at the attractiveness of each market so that it can be decided which one the organisation will choose to focus on. The third and last step

involves positioning which is when an organisation positions its offerings or products and marketing mix in order to meet the expectations on its chosen target market.

According to Boyd *et al.*, (1995) marketing segmentation is the process by which a market is divided into distinct customer subsets of people with similar needs and characteristics that lead them to respond in similar ways to a particular product or service offering and strategic marketing program. Market segmentation is done so that the organisation can concentrate their marketing efforts on consumers that they know they will be able to satisfy. The organisations need to have answers to the 'who', 'what', 'how', 'where' and 'when' questions (Morrison, 2002; Jobber, 2007; Kotler, 2000; Kotler & Armstrong, 2006). Morrison (2002) refers to these questions as follows: which market segments should be pursued; what are they looking for in organisations' types of services; how to develop marketing programs to best fit their needs and wants; where to promote the services; and when to promote them?

Market segmentation is an important analytical tool that forms the bases of internal analysis and is one of the fundamental principles of marketing. A number of organisations have facilitated the implementation of specialised marketing programs by broadening and segmenting their own services (Boyd *et al.*, 1995).

Boyd *et al.*, (1995) express that market segmentation offers the following benefits: It identifies opportunities for new product development; it helps in the design of marketing programs that are most effective for reaching homogeneous groups of customers; it improves the strategic allocation of marketing resources. Morrison (2002) and George (2007) agree that market segmentation allows organisations to maximise its available budget, more effective positioning and greater precision in selecting promotional vehicles and techniques.

Once the organisation has recognised different segments of the market, the next step is to decide how many and which segments to target. Target marketing is a strategy associated with promotion that involves identifying specific niche markets and developing products for each market segment (Bushel & Eagles, 2007). Target marketing decisions determine the number of segments to target and plans for product, price, channel management and integrated marketing communication to reach these segments (Saayman, 2006). The organisations must select the

markets mostly attractive to them. There are four targeting approaches or strategies that organisations can choose from. These are niche or concentrated marketing; differentiated marketing; undifferentiated marketing and customised marketing (Saayman, 2006; George, 2004 and Bennett *et. al.*, 2005; Jobber, 2007).

Niche marketing is where an organisation focuses on meeting the needs of just one segment better than any other organisation (George, 2004). This approach is usually used by specialist organisations and or those that have limited resources. Differentiated marketing is when an organisation targets several segments but separate marketing offerings are designed for each of them (Bennett *et. al.*, 2005). This means that the destination prepares marketing mixes for all segments chosen. Undifferentiated marketing is basically no segmentation at all. Here the organisation focuses on what is common in consumer needs than what is different (George, 2004; Jobber, 2007). Customised marketing entails organisation focusing its marketing on the needs of each individual consumer (George, 2004). Customised marketing is also known as micromarketing (Kotler & Armstrong, 2006). This is of benefit if the organisation has the resources and can go that extra mile and satisfied needs of each and every consumer no matter how different the consumers may be.

Once the organisation decides which segments it will target, the last step is decide what position it wants to occupy in those segments. Market positioning according to George (2004) and Kotler & Armstrong (2006) is the way in which organisations and their offerings are perceived by consumers relative to competition. These perceptions are usually created by the organisation through its marketing communications with the consumers.

How an organisation communicates with its target market is very important within a marketing strategy. Without this aspect the target market has no idea that the organisation exists and with what products. Integrated marketing communications is a concept that organisations use to coordinate their marketing communication tools to deliver a clear, consistent, credible and competitive message about the organisation and its products (Jobber, 2007). There are a number of tools available to the organisation to use to communicate with their customers. This is also referred to as the promotional mix and integrates advertising, publicity, sponsorship, public

relations, sales promotion, direct marketing, database marketing, internet marketing, personal selling and printed literature (George, 2004).

As with positioning discussed in 2.4.4 above, the main objective of communication strategy is to ensure favourable position of the organisation and its products clearly and distinctly in the market place. This means that marketing communications can lead to improved consistency and better positioning of organisations and their brands in the minds of the consumers (ibid). Kotler & Armstrong (2006) urge organisations not to leave their communication to current and desired market to chance; they stress that all communication efforts must be blended into a consistent and coordinated communications program. Not only is this good for ensuring business but also for customer relationship and retention thereof. The organisations can use a combination of the already mentioned communication tools to come up with their own strategy or program based on who their target market is. Integrated marketing communication supports target marketing discussed in 2.5.4 above as organisations can choose the most effective combination of tools for marketing, in ways that they know their target markets would best receive the messages being communicated.

2.4.4 Definition of Marketing Mix and Destination Mix

Holloway (2004) identifies the concept of the marketing mix as one of the most important in marketing and can be called the core of all marketing planning. The marketing mix is described by Kotler & Armstrong (2006) and Kotler (2000) as the set of controllable tactical marketing tools that the organisation blends to produce the response it wants in the target market. In traditional marketing there are four (4) Ps which are Product, Price, Place and Promotion (Kotler, 2000). In tourism there are eight (8) Ps which are the Product, Price, Place, Promotion, People, Partnership, Packaging and Programming (Morrison, 2002). This means that when viewing organisations that operate within the tourism industry 8 Ps need to be considered for strategy formulation.

The destination mix is also an important factor in the tourism industry that deserves organisation's marketing attention. Destination marketing at its best involves planned cooperation, coordination and linkages between tourism organisations in a country or region

(Seaton & Bennett (1996). A destination cannot call itself a destination worth visiting by tourists unless the aspects that make up a tourism destination are there. George (2004) defines a destination mix as a unique relationship found in the tourism industry involving attractions and events, facilities, infrastructure and transportation amenities, and hospitality resources.

It involves the destination mix called the four (4) A's (George, 2004) or FAITH (Hsu *et. al.*, 2008). The 4 A's are the attractions, accessibility, amenities and ambience which are believed to be essential in helping to market any destination (George, 2004). Hsu *et.al.* (2008) have a similar belief and their mix comprises FAITH for facilities, attractions, infrastructure, transport and hospitality. For Lumsdon (1997) what influence the success in destination marketing is the natural resources, climate and culture. These destination mix components are interrelated and all are essential in presenting and producing a satisfying holiday experience to tourists. As such they have to be considered in strategy formulation of an organisation operating within the tourism industry.

2.4.5 Branding

Branding refers to the use of a name, term, symbol or design (or a combination of these elements) to identify the product of an organisation (Bennet & Strydom, 2001). Organisations also benefit as it fosters a continuing relationship with consumers which protects them against competition.

Branding a destination on the other hand requires development of a destination image that is well positioned in relation to the needs and wants of the target market, the image of competitor destinations and the deliverable attributes of the destination (Laws, 2002). The Tourism Company (2004) states that branding is the feelings, impressions and perceptions that people have about the destination. They use the analogy of an individual's personality to further illustrate branding, that there are many elements that make up a destination's brand, but each of the elements is not the brand itself. Although the topic of destination branding did not appear in tourism until the late 1990's (Pike, 2004), it has become extremely important. Kapferer (2004) assures that if properly managed, brands are one of the few strategic assets at a company's disposal that can provide a long-lasting competitive advantage. However there are still a number

of challenges associated with branding a destination. These according to Morgan *et. al.* (2002) may include the limited budget that is available to market a destination; politics; external environment; destination product; and creating differentiation. Some of these have already been identified as areas in which the strategy formulation would be of benefit.

There are a number of advantages associated with branding. According to Boyd *et al.*, (1995) branding simplifies consumer's choices, and it helps to ensure quality and often satisfies certain status needs. It helps to identify a particular product and distinguishes it from those of competitors (Bennet & Strydom, 2001). Branding acts as a form of quality certification, which aids the consumers' decision-making process (Jobber, 2007). Kotler & Armstrong (2006) agree that branding represents consumers' perceptions and feelings about a product and its performance, everything that the product or service means to consumers. That it can help create brand loyalty (Bennett *et. al.*, 2005), this is also affirmed by Holloway (2004) who believes that consumers who are satisfied with the brand purchase are likely to repeat the purchase and over time to become regular purchasers of the product. Holloway (2004) expresses that where the product is intangible, as it is the case with tourism products which are experienced rather than taken home, the purchase of a branded product helps the consumer to avoid risks. Branding creates a favourable position for the destination and allows consumers to distinguish it from competitors according to attributes that are significant to their motivations (George, 2004). Thus the real value of a strong brand is its power to capture consumer preference and loyalty. Baker (2008) confirms branding as a fundamental component in destination marketing.

Before an organisation's reputation and corporate image can have any impact whether positive or negative on customers' buying decisions, the customers must be aware of which specific products or service offerings are sponsored by the organisation (Walker *et. al.*, 2008). The authors argue that organisations have three options as far as corporate branding is concerned: the first one is the corporate brand might serve as the brand name of all the organisation's products in markets around the world. The second one is the organisation might adopt a dual branding strategy where each offering carries both a corporate identifier and an individual product brand. Lastly each product offering might be given a unique brand and identity while the identity of the

source organisation is not emphasised. Organisations are most likely to emphasise a strong corporate brand if the various product offerings are closely interrelated.

2.4.6 Destination and Collaborative Marketing

A destination according to George (2008:400) is “a place, including a physical or perceived location, consisting of primary and secondary attractions and supporting amenities that entice people to visit”. A destination may not even be a single place, but a conceptual entity which incorporates several destinations and locations *e.g.* uKhahlamba Drakensberg Park World Heritage Site which is shared by more than one country. Destination marketing is the heartland of tourism marketing. The destination itself is the catalyst link that precipitates all the other industries in the tourism sector. Unless people want to go somewhere provision for transporting them, resting them, feeding them and amusing them will be in vain (Seaton & Bennett, 1996).

A destination is both a physical entity and socio-cultural entity, it is not just something that actually exists; it is what is thought to exist, a mental concept in the minds of its tourists and potential tourists (Seaton & Bennett, 1996). This expresses the importance of destination image. Lumsdon (1997) identifies the three powerful influences that shape the form of tourism marketing at most destinations as: natural resources, climate and culture.

It has been recognised that destination marketing and promotion, if done individually and independently by various tourism stakeholders, cannot be conducive to developing a holistic image of the destination thus cannot enable the destination to succeed in the long run (Wang & Xiang, 2007; Fyall & Garrod, 2004; and Grangsjö, 2003). One of the major differences in destination marketing from other kinds is the role of public sector support and or the creation of private sector partnerships to market a destination (Seaton & Bennet, 1996). Destination marketing is always an intentional or unintentional collaboration because all the tourism organisations marketing themselves in an area have some impact upon perception of the overall destination. It involves planned cooperation, coordination and linkages between tourism organisations in a given region. Collaborative marketing efforts thus give the destination a competitive advantage. World Heritage Icon Value (2002) concur with this and say there is a

need for a sustainable model of tourism development and one in which stakeholders are widely involved.

Figure 3 adapted from Fyall & Garrod (2005) illustrates three key stages of the strategic marketing planning process: the situational analysis; strategic marketing planning; and strategic marketing implementation and control. This illustration is intended solely as a vehicle to address the collaboration components of the strategic marketing planning process, which UDP WHS could adopt as a strategy towards collaborative marketing efforts. Collaborative marketing is not going to be covered by the scope of this study but is included merely to show its importance and relationship to strategic tourism marketing.

The collaborative strategic tourism marketing planning process

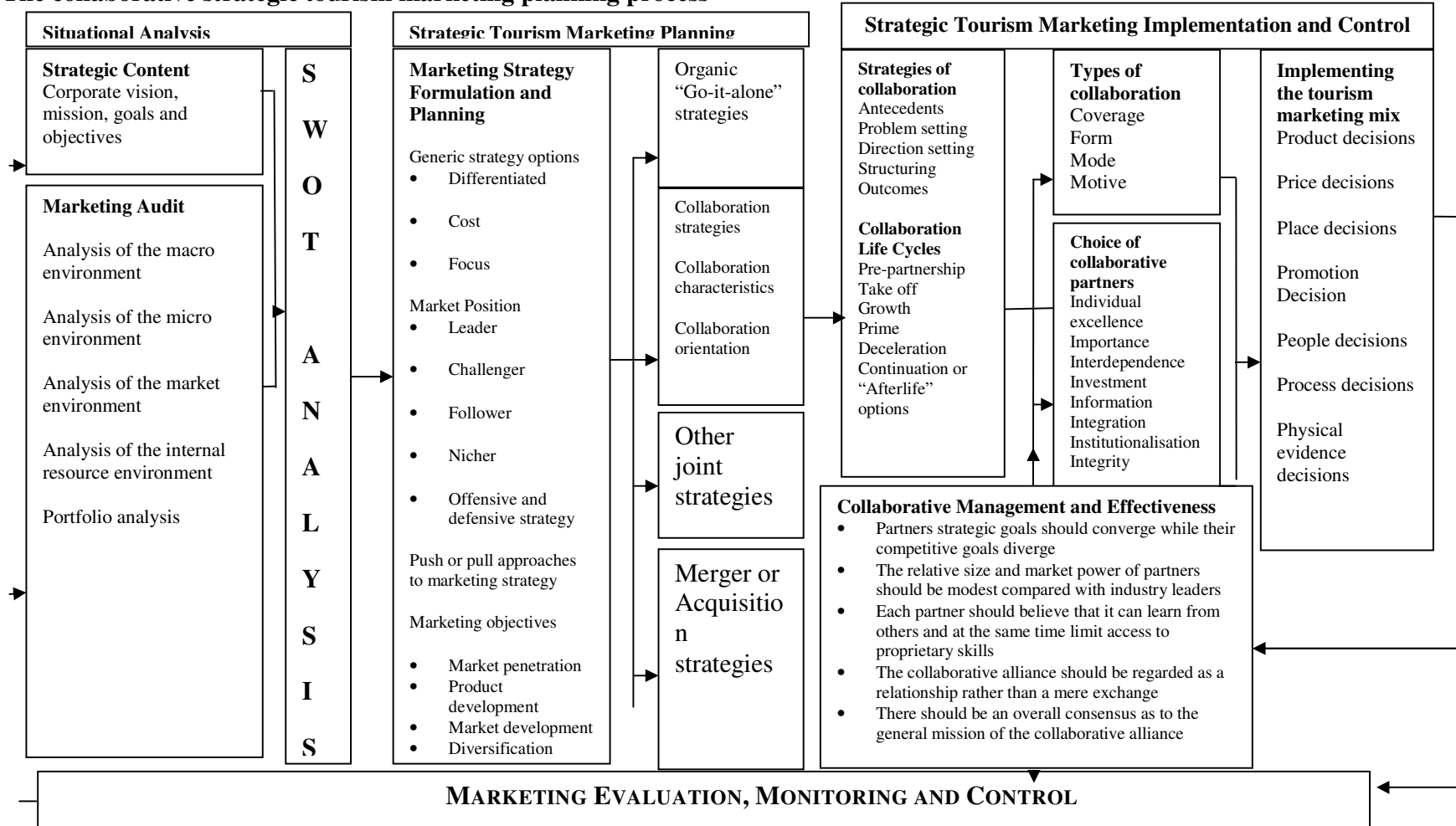


Figure 3 The collaborative strategic tourism marketing planning process

Source: Fyall & Garrod (2005:324)

2.5 Summary

This chapter reviewed literature on the topics of the study. There are many facets that the organisation should consider before deciding what its marketing strategy will include: the analysis of the tourism environment, markets and competition to ensure that the right decisions are being made for the right reasons. The literature paves a way for the study's purpose to be able to evaluate EKZNW's current eco-cultural marketing activities with an aim to generate information that can inform development of the marketing strategy which will be aligned with the goals of EKZNW enabling UDP WHS to compete internationally.

The next section will deal with the methods that were used to collect primary research information. The information collected will be compared with the literature in this section and recommendations towards the strategy will then be made.

This chapter has clearly indicated that for the strategy to be successful there would be a need for some kind of collaborative marketing and branding. As such relationship marketing must be evident in the marketing strategy showing the interrelatedness of the UDP WHS as a tourism product to the entire tourism system involving all stakeholders in the region. This is due to the fact that the product exists not as a result of tourism, but rather as a by-product of the need to protect and conserve both cultural heritage resources for current and the future generations.

Furthermore, tourism businesses within the vicinity of the site have used the World Heritage Site brand to promote their ventures and sell their experience as part of the wider opportunity the World Heritage Site region offers. As a result, marketing has been seen as "*a social and managerial process by which individuals and groups obtain what they need and want through creating and exchanging products and values with others*" (Kotler & Armstrong, 1999:3). Wearing *et.al.* (2007), has argued that the marketing concept in a case of Protected Areas has come to incorporate outcomes other than profit, such as long-term environmental conservation, improved customer awareness, appreciation of the natural environment, delivery of societal benefits, and customer satisfaction. Clearly, this indicates that there is a need for a comprehensive collaborative approach with other stakeholders. Thus the main function of

marketing in a Protected Area (PA) is to keep in contact with the organisation's stakeholders, their needs, and develop products that meet their needs through collaborative approach.

According to UNESCO's guidance on tourism in World Heritage Sites, any marketing development should take into account the wider management responsibilities associated with the World Heritage Site. This highlights and expresses the importance of integration in Protected Area management. For this reason it is imperative that there be a proper marketing strategy for World Heritage Sites which will ensure sustainability, protection and continuous revenue benefits. Furthermore, marketing is concerned with achieving goals; these might not be about making money although some organisations may aim to increase their market share. For that reason, other organisations such as EKZNW aim to conserve the natural environment and are not only concerned with getting numbers through their gates.

Effectively, this means that no marketing strategy will be successful unless it is implemented and controlled effectively. Therefore, there are a number of issues that need to be addressed in order for a strategy to succeed. These in terms of strategy implementation include resource allocation, organisational culture, strategic leadership, organisational structure, organisational systems, rewards and incentives, policies and procedures, and best practices and continuous improvements. As a result, a competitive advantage exists when a destination or organisation is able to deliver the same benefits as competitors but at a lower cost (cost advantage), or deliver benefits that exceed those of competing products.

There are also a number of tools available to the organisation to use to communicate with their customers. This is also referred to as the promotional mix and integrates advertising, publicity, sponsorship, public relations, sales promotion, direct marketing, database marketing, internet marketing, personal selling and printed literature. This can also be shared with other reputable partners. This is due to that fact that in traditional marketing there are four (4) Ps which are Product, Price, Place and Promotion. Whereas, in tourism there are eight (8) Ps which are the Product, Price, Place, Promotion, People, Partnership, Packaging and Programming. Based on this, it is believed that UDP WHS could also use the same approach to maximise its benefits. The destination mix is also an important factor in the tourism industry that deserves an

organisation's marketing attention. Destination marketing at its best involves planned cooperation, coordination and linkages between tourism organisations in a country or region.

It has been recognised that destination marketing and promotion, if done individually and independently by various tourism stakeholders, cannot be conducive to developing a holistic image of the destination thus cannot enable the destination to succeed in the long run. One of the major differences in destination marketing from other kinds is the role of public sector support and or the creation of private sector partnerships to market a destination. Destination marketing is always an intentional or unintentional collaboration because all the tourism organisations marketing themselves in an area have some impact upon perception of the overall destination. It involves planned cooperation, coordination and linkages between tourism organisations in a given region. Collaborative marketing efforts thus give the destination a competitive advantage.

CHAPTER 3

RESEARCH METHODS

3.1 Introduction

The aim of this chapter is to discuss the methods used to collect and analyse data for this research, and the reasons for using such methods. The objectives of the study provided the major framework in which to structure the methods. The objectives are to:

1. determine the ideal generic marketing strategy for a Protected Area specifically a World Heritage Site;
2. establish the current status of EKZ~~NW~~'s marketing strategy for the UDP WHS;
3. conduct a comparative analysis between the ideal strategy and EKZ~~NW~~'s actual strategy for UDP WHS; and
4. based on the comparative analysis, recommend marketing interventions to improve the eco-cultural tourism marketing strategy for UDP WHS.

This section of the research will deal with the approach used to conduct the study, how the information was collected and analysed. It deals with the problems that the researcher faced while seeking answers to fulfil research objectives. The target and sample details and choices are explained, the target population was mostly the employees of EKZ~~NW~~ because of the nature of the research itself. As suggested by Fox & Bayat (2007) all respondents were informed about the aims of the research, that their confidentiality will be ensured, the expected study benefits to accrue to them, and their participation was voluntary. These matters were set out in an informed consent letter in which respondents were requested to sign in accordance with UKZN Research Policy.

This type of research has not yet been conducted for the specific area of UDP WHS. It is believed that the study will be of benefit to many Protected Areas in South Africa and to EKZ~~NW~~ in particular as an organisation.

3.2 Research Framework

The decision to work with qualitative research is linked to the type of investigation that this study sought to conduct. This is illustrated in Figure 4 which depicts the framework within which this study is based. In qualitative research one wants to find out not only what happens but also how it happens and, importantly, why it happens the way it does (Henning *et. al.*, 2004). In the study this is done through comparing the generic ideal strategy to the actual EKZNW's eco-cultural tourism marketing strategy so that based on the gap, recommendations can be made.

The research process as outlined in Figure 4 was followed in this study. There were four research objectives which have to be met. Before these objectives could be achieved, literature on PAs/WHSs, marketing and ideal marketing strategy had to be carefully reviewed. Secondly, the ideal strategy was compiled based on the six main marketing strategic elements as follows: Marketing goals and expectations; market information gathering; segmentation, targeting and positioning; marketing and destination mix; branding and destination and collaborative marketing. Thirdly the EKZNW's actual marketing strategy for the UDP WHS was studied and compared against the ideal marketing strategy for a WHS. Lastly the study then suggested recommendations to bridge any gaps that might exist on the EKZNW's marketing strategy for the UDP WHS.

Research process outline

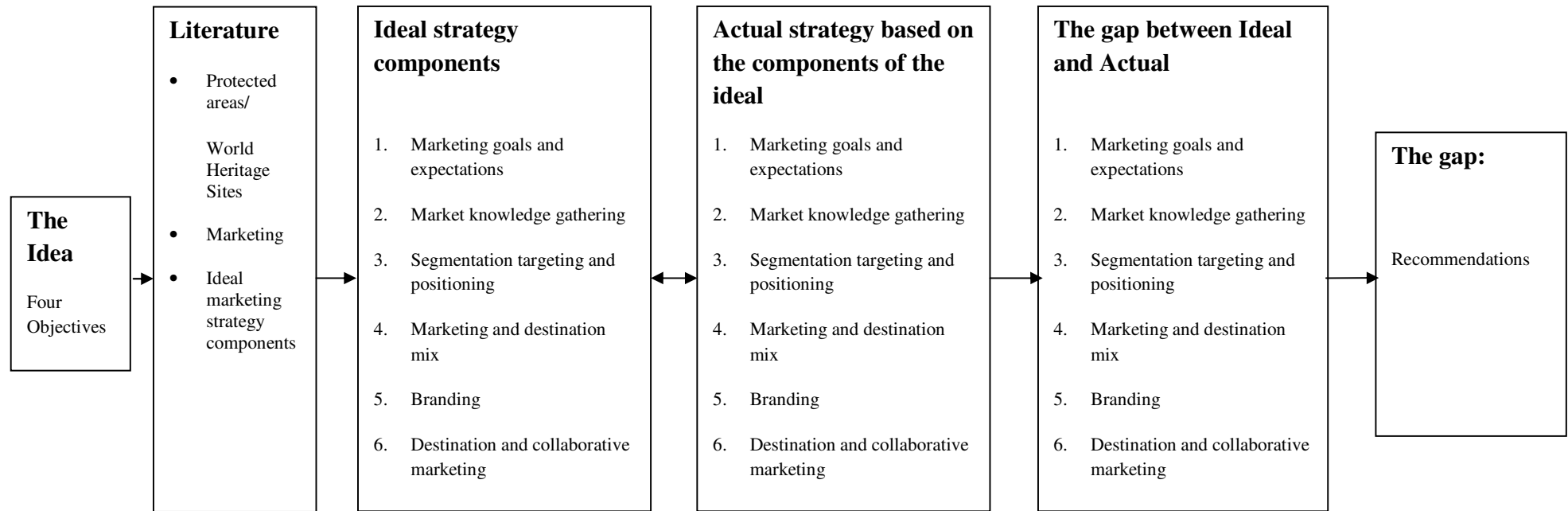


Figure 4 Research process outline

3.3 Qualitative Research Methods

Qualitative research is designed primarily for exploratory purposes (George, 2008). When used to investigate marketing problems, qualitative research is a diagnostic tool (Hague & Jackson, 1999). The reason for the research reported in this thesis to be viewed as such is because of its capability in investigating marketing problems. Problem solving requires an understanding of cause and effect and these can be flushed out by in-depth discussion (ibid). A qualitative interview is a way of learning about people's thoughts, feelings and experiences (Fox & Bayat, 2007).

This type of research method helped in this study by finding out how the respondents, in this case, EKZNW marketing staff, their hospitality managers and the UDP WHS tourism stakeholders, feel and deal with eco-cultural tourism, their perceptions, marketing habits, opinions and attitudes. Qualitative research helps obtain in-depth insight into a relatively small number of respondents (George, 2008). Qualitative research was used to understand the marketing approaches that EKZNW and businesses have used/are using to attract an eco-cultural tourist to the UDP WHS area. Qualitative research was more dominant than quantitative research due to the nature of the study being carried. Qualitative research is often used for creative inspiration and guidance (Hague & Jackson, 1999).

Much of the study is qualitative in nature; however some quantitative data has been gathered in order to strengthen the UDP WHS marketing strategy when and once formulated. Finn *et al.*, (2000) believe that methods using quantitative data can be used to generate hypotheses, and qualitative research can be used to test hypotheses. In its predevelopment the UDP WHS marketing strategy would require some quantitative data, but the formulation of and the actual strategy itself requires more in-depth data able to capture the image of the organisation, its culture, its vision and marketing approaches. It was essential to combine where possible the two approaches to help maximise the strengths and minimise the weaknesses of each method (Finn *et al.*, 2000). These methods therefore complement each other to give this study more depth as opposed to compete against each other.

Data collected was generated through qualitative methods. The methods used also considered the PEST and SWOT analysis and these were incorporated in subset questions in the questionnaire under the theme: market information gathering. PEST analysis looks at the political, economical, socio-cultural and technological environments in which the organisation operates. A SWOT analysis gauges the strengths, weaknesses, opportunities and threats related to the organisation. For any organisation to be able to move in a strategic direction, it is required to undertake such analysis. Unless this analysis is first done, the organisation has no way of being able to move forward in its strategic direction. It helps the organisation understand where they are strategically and helps to make it realise where it can be in the future.

It is important to note that the questions used for the stakeholders were the same as the ones asked of EKZNW staff, however the stakeholders were asked these questions on a more general tone and with a different focus, for example branding and collaborative marketing efforts seem to be focus area for the majority of stakeholders. As the majority of the questions were strategic in nature and directed at EKZNW, the study used the semi-structured interviews with the stakeholders of UDP WHS because they could not possibly answer all the questions unless they were only referring to their particular organisations. This was done to give stakeholders more room to express their views and opinions based on what they have or can have in common with the EKZNW's UDP WHS.

The qualitative research methods that were used for data collection were structured face-to-face interviews, semi-structured face-to-face interviews, group discussion, SWOT analysis and secondary data analysis. A mix of techniques was used on all respondents.

3.4 Data Collection

Several meetings were held with EKZNW's Regional Ecotourism co-ordinator (referred to as the senior manager) prior to the field data collection. The objectives of the research were discussed with the senior manager. The main research themes and questionnaire (Appendix A) were distributed to the Regional Ecotourism co-ordinator, the three marketing staff to prepare for the interviews because some information might not have been readily available. The Executive Director: Commercial Operations in EKZNW whom the marketing staff reports to also received

the questionnaire. This was to encourage the staff to be well prepared for the interviews. The stakeholders on the other hand were not given this questionnaire as the majority of the information concerning the EKZNW's UDP WHS marketing strategy could be obtainable and solely answered by EKZNW staff.

All surveys were conducted face-to-face because the respondents can give better explanations and an interviewer can gain a deeper understanding of the validity of a response (Hague & Jackson, 1999). These authors further stress the depth as a benefit of personal interviews, for example it is easier to maintain the interest of respondents for a longer period of time in personal interviews and because of face to face contact, and concerns about confidentiality can be more readily satisfied (ibid).

The study surveyed the following target population as shown in Table 1. Primary data or field information was drawn from these groups: tourism businesses in the UDP WHS; the tourist information centres and the municipalities in UDP WHS area; and the hospitality managers in the UDP WHS and personnel responsible for the development of tourism, ecotourism, cultural heritage and marketing at the EKZNW.

Surveyed target population

Categories interviewed	Number in each category	Percentage
EKZNW:	13 Respondents:	48%
Marketing personnel	03	
Hospitality Managers	10	
UDP WHS Stakeholders :	14 Respondents	52%
Three (3) Tourism businesses	07	
One (1) Cultural community project	02	
Three (3) Publicity associations	02	
Two (2) Municipalities within the UDP WHS	03	
Total:	27 Respondents	100%

Table 1: Surveyed target population

All interviews with UDP WHS stakeholders were conducted personally during the field work in company of the EKZNW senior manager for the Western area in which UDP WHS falls. The

stakeholders interviewed during the site visits included tourism businesses (3), a cultural community project (1), publicity associations (2), and municipalities within the UDP WHS (3). In total 27 individuals were interviewed for this study, 13(48%) of whom were EKZNW employees and 14(52%) were tourism stakeholders in UDP WHS. Meetings were held with different EKZNW staff including the CEO, the marketing staff, and hospitality managers for different camps in UDP WHS. 77% of the interviews with EKZNW staff constituted of hospitality managers and 23% was the marketing personnel. Some of these meetings and interviews were conducted on site at the UDP WHS and others were conducted at the EKZNW's central office at Queen Elizabeth Park.

This study was welcomed and supported by the Executive Director: Commercial Operations, EKZNW. However, it must be noted that obtaining some valuable marketing information such as actual current written or previous marketing strategy or any market analysis done, was a huge challenge because EKZNW did not have it. However the study did everything possible to obtain information that will truly reflect EKZNW's strategy to marketing.

3.4.1 Structured Face to face Interviews

Structured face to face interviews were conducted with the EKZNW staff in the UDP WHS and those conducting marketing activities for the organisation (13 people), 4 of which were part of the focus group. According to Finn *et al.*, (2000) face-to-face contact between the participant and the researcher generate high response rate in surveys. An interview schedule was used during the interviews and it consisted of only open ended questions (Annexure A). According to Finn *et al.*, (2000) structured interview is a standard interview schedule designed to answer a series of specific questions on a face-to-face basis. Data was collected through personal interviews. The information was collected and recorded through taking of notes of the participants responses during the interview sessions.

3.4.2 Semi-structured Face-to-face Interviews

Semi-structured face-to-face interviews were conducted with the stakeholders (14 people), 7 of which were also part of the focus groups. For semi-structured interviews the study still focused

on the same themes but the emphases per theme was different per stakeholder. The themes may vary from one interview to the next (Welman *et al.*, 2005). Some themes were discussed more than others during interaction with the stakeholders. This was based on the specific stakeholder's knowledge on the matter of strategic marketing and how it affects them as a stakeholder. For example, most of the discussion themes for stakeholders were general, around branding and collaborative marketing.

3.4.3 Group Discussions

Group discussion is a qualitative technique for collecting information (Welman *et al.*, 2005). Group discussion is commonly known as a focus group and usually contain between four and twelve people (Fox & Bayat, 2007). The use of this tool encourages respondents to open up if they are asked to share their views as part of a small group (Hague & Jackson, 1999). Within a group there is brainstorming effect so that a comment from one person sparks ideas from another. This gives way to more ideas than one-on-one interviews (*ibid*). The group respondents answered the same questions as other respondents but on debate/discussion setting. The respondents were chosen based on their relevancy to this study and consisted of 3 groups, firstly a group from EKZNW staff (4 people), secondly a group from the tourism businesses in UDP WHS area (4 people), and lastly a municipality group (3 people).

3.4.4 SWOT Analysis

A SWOT analysis was compiled during and after interviews with all the respondents. This type of analysis is very important in this study. Holloway (2004) agrees that the SWOT analysis is a necessary first step in systematically appraising the present position of the organisation and in identifying its problems. Sometimes the terms marketing or market audit and situational analysis are used instead of SWOT analysis (Morrison, 2002). The SWOT analysis on this study was on marketing aspects of the UDP WHS as the Park and not on EKZNW as the organisation that manages the Park. A SWOT analysis gives an organisation a clear indication of where it is in terms of how it compares with competitors, how it is seen by its consumers, and what resources and capabilities it has to deal with a changing market (George, 2004; Kotler, 2000).

3.4.5 Secondary Data Analysis

In this type of qualitative research method, the primary data can be reviewed in light of any new information found (Welman, *et. al.*, 2005). Secondary data was reviewed to understand marketing tourism practices of EKZNW and tourists to the area. Secondary data was reviewed to understand the demand and usage for eco-cultural tourism products in the UDP WHS. One specific way to measure this is through the use of camps, caves and accommodation units by the visitors. The information available on visitor profile, products and services, communication and marketing techniques to attract visitors was all analysed to help understand if UDP WHS is getting the right markets targeted. The information included reports, brochures and visitor numbers to the area and accommodation revenues between the year 2003 and 2008 (EKZNW, 2009). Field work being done early in 2009, show there was no visitor statistics information available for the years before 2003 and after 2008. The reason that was given for no visitor statistics information before 2003 was that it was not available, they did not have it; and the reason for no 2009 statistics was that it was still early in the year and the organisation's financial year end had not yet come for those statistics to be available.

3.5 Data Analysis and Interpretation

The study critically analysed and interpreted qualitative information through theme identification. This was guided by the questionnaire (Appendix A) used during the interviews. According to Welman *et al.*, (2005) themes are like umbrella bodies which are identified for the study before, during and after data collection. This being the case the information obtained from the interviews was organised into the six themes.

The mapping of the interview questions to the six themes of the study will be presented in Chapter 4. This mapping will show which questions from the questionnaire were relevant for which theme. Most of these questions are relevant to more than a single theme. The themes of this research were identified as: marketing goals and expectations; market information gathering; segmentation, targeting and positioning; marketing and destination mix; branding; and destination and collaborative marketing.

A SWOT analysis was also used to analyse the information as this would give more insight as to where EKZNW is in terms of marketing as an organisation in charge of this activity in the UDP WHS.

3.6 Summary

This chapter gave a description of the study research process and methods that were used to conduct this study. The study reviewed a number of methods that were used to collect and analyse data. Qualitative approach to research was used and motivation for this approach given. Data was collected through structured face-to-face interviews, semi-structured face-to-face interviews, group discussion, SWOT analysis and secondary data analysis were used as tools for data gathering. The information was analysed through the themes which were the framework of the study.

The research themes included collaborative marketing, partnership and branding. The study incorporated these themes during the data analysis. This was mainly based on the specific stakeholder's knowledge on the matter of strategic marketing and how it affects them as a stakeholder. As a result most of the discussion themes for stakeholders were general, around branding and collaborative marketing.

The following chapter will go into details regarding the findings and analysis of the results.

CHAPTER 4

RESULTS AND ANALYSIS: ECO-CULTURAL MARKETING STRATEGY

4.1 Introduction

This chapter presents results of the study based on the following themes:

- i) Marketing expectations, issues and goals;
- ii) Market information gathering;
- iii) Segmentation, targeting and positioning;
- iv) Marketing and destination mix;
- v) Branding; and
- vi) Destination and collaborative marketing.

The data was collected and processed in response to the objectives set in Chapter 1, Section 1.6 of this dissertation. The way in which the results are presented i.e. table form shows both the results and provides the initial point by point analysis. Each theme will be synthesised and discussed in Chapter 5. A mapping of the interview questions to the themes is presented first (Table 2) and then followed by the gap analysis table for each theme. Four objectives directed the collection of the data and the subsequent data analysis. These objectives were to determine the ideal generic marketing strategy for a Protected Area specifically a World Heritage Site and to; establish the current status of EKZNW's marketing strategy for the UDP WHS; conduct a comparative analysis between the ideal strategy and EKZNW's actual strategy for UDP WHS; and recommend marketing interventions to improve the eco-cultural tourism marketing strategy for UDP WHS. The results are presented and summarised in a table format for each theme under the actual marketing approach column. They are then discussed in detail in Chapter 5 of the thesis.

4.2 Mapping of Interview Questions to the Themes

The following (Table 2) is a map of the interview questions (Appendix A) to the six themes of the study. It illuminates which questions are relevant for which theme, while it gives a clearer perspective of themes to the questions in terms of context.

Table 2: Mapping of Interview Questions to the Themes

NO.	THEME	QUESTION
1.	Marketing goals and expectations	<ol style="list-style-type: none"> 1. What business is EKZNW in? 2. What services and/or products does UDP WHS provide? 3. What are the specific marketing objectives over the next two years? What objectives address the following as goals? <ul style="list-style-type: none"> • Number of tourists • Revenue • Profit • Market share 4. What is the market opportunity? 18. What need is the UDP WHS offering designed to fill?
2.	Market knowledge gathering	<ol style="list-style-type: none"> 1. What business is EKZNW in? 2. What services and/or products does UDP WHS provide? 3. What are the specific marketing objectives over the next two years? What objectives address the following as goals? <ul style="list-style-type: none"> • Number of tourists • Revenue • Profit • Market share 4. What is the market opportunity? 6. What are the key tourism industry trends that are fueling UDP WHS's success? What tourism industry trends can inhibit success? 7. What is the economic climate now and in the next couple of years? How will the economic climate affect tourism in UDP WHS? 8. Is UDP WHS or its market affected by business cycles or seasonality? How it is affected. 10. What is UDP WHS customer's primary reason for visiting or wanting to use its product or services? 12. Are there any issues or concerns that the target audience might have regarding this type of product or service? 15. Which competitors have the largest market share within UDP WHS's target market segments? Which competitors have the greatest visibility with UDP WHS's target audience? 24. What does each of UDP WHS's identified target audiences know and believe about EKZNW today? 28. What evidence can be used to support the claims for each message listed in item D? 29. What happy customers does UDP WHS have today that it can reference in its communications? 43. Are competitive price changes anticipated in the near future? 44. What tourism industry trends are going to drive prices down? What tourism industry trends are going to drive prices up?

Mapping of Interview Questions to the Themes (Continued)

NO.	THEME	QUESTION
3.	Segmentation, Targeting and Positioning	<p>4. What is the market opportunity?</p> <p>5. How is the market segmented into logical customer groupings?</p> <p>9. What market segments is UDP WHS targeting (segment name and characteristics)? What segments are not being targeted?</p> <p>10. What is UDP WHS customer's primary reason for visiting or wanting to use its product or services?</p> <p>11. Why would someone prefer UDP WHS's offering versus that offered by the competition?</p> <p>12. Are there any issues or concerns that the target audience might have regarding this type of product or service?</p> <p>14. Which Heritage sites or destinations pose the greatest threat, and how do they differentiate themselves? What strategic or tactical elements do they use that threaten UDP WHS's success?</p> <p>15. Which competitors have the largest market share within UDP WHS's target market segments? Which competitors have the greatest visibility with UDP WHS's target audience?</p> <p>16. How will UDP WHS differentiate itself to best combat competition?</p> <p>17. What barriers to entry into the marketplace is UDP WHS creating for itself? What is UDP WHS doing so that it is not easy for others to enter the market place?</p> <p>18. What need is the UDP WHS offering designed to fill?</p> <p>19. What features and associated benefits does UDP WHS offering provide?</p> <p>21. Of these features, which ones differentiate UDP WHS from the competition?</p> <p>22. What improvements does UDP WHS make to their offering to better meet customer needs?</p> <p>23. What new offerings would UDP WHS's customers most like EKZNW to develop?</p> <p>24. What does each of UDP WHS's identified target audiences know and believe about EKZNW today?</p> <p>25. What is the single most important message that must be communicated to ALL of UDP WHS's target audiences?</p> <p>27. List the single most important message that must be communicated to EACH target audience.</p> <p>30. What kind of personality does UDP WHS want to portray in its communications? What tone? What flavour?</p> <p>31. What is the overall impression about the organization that EKZNW want UDP WHS customers and partners to take away after each interaction with them?</p> <p>34. How does UDP WHS's target audience buy the Site's type of offering? Is the visit an impulse one or a carefully planned visit?</p> <p>35. What buying process steps do the members of the target audience follow?</p> <p>41. What is the perceived value of UDP WHS offering as compared to its price?</p>

Mapping of Interview Questions to the Themes (Continued)

NO.	THEME	QUESTION
4.	Marketing and destination mix	<ol style="list-style-type: none"> 2. What services and/or products does UDP WHS provide? 3. What are the specific marketing objectives over the next two years? What objectives address the following as goals? <ul style="list-style-type: none"> • Number of tourists • Revenue • Profit • Market share 4. What is the market opportunity? What is the market size with respect to geography and to the tourism industry? 7. What is the economic climate now and in the next couple of years? How will the economic climate affect tourism in UDP WHS? 8. Is UDP WHS or its market affected by business cycles or seasonality? How it is affected. 10. What is UDP WHS customer's primary reason for visiting or wanting to use its product or services? 12. Are there any issues or concerns that the target audience might have regarding this type of product or service? 13. What categories of competition threaten UDP WHS's success? 14. Which Heritage sites or destinations pose the greatest threat, and how do they differentiate themselves? What strategic or tactical elements do they use that threaten UDP WHS's success? 16. How will UDP WHS differentiate itself to best combat competition? 17. What barriers to entry into the marketplace is UDP WHS creating for itself? What is UDP WHS doing so that it is not easy for others to enter the market place? 18. What need is the UDP WHS offering designed to fill? 19. What features and associated benefits does UDP WHS offering provide? 20. How does UDP WHS deliver the features identified in item B? 21. Of these features, which ones differentiate UDP WHS from the competition? 22. What improvements does UDP WHS make to their offering to better meet customer needs? 23. What new offerings would UDP WHS's customers most like EKZNW to develop? 24. What does each of UDP WHS's identified target audiences know and believe about EKZNW today? 30. What kind of personality does UDP WHS want to portray in its communications? What tone? What flavour? 31. What is the overall impression about the organization that EKZNW want UDP WHS customers and partners to take away after each interaction with them? 32. What is the process for selling UDP WHS's services or products? Do they use any of the following processes? <ul style="list-style-type: none"> • Direct personal sale • Direct online sale • Indirect through channels

Mapping of Interview Questions to the Themes (Continued)

NO.	THEME	QUESTION
4.	Marketing and destination mix	<p>33. Who is involved, both from EKZNW and from their sales channel partners, in each step of the sales process?</p> <p>34. How does UDP WHS's target audience buy the Site's type of offering? Is the visit an impulse one or a carefully planned visit?</p> <p>35. What buying process steps do the members of the target audience follow?</p> <p>36. What buying criteria does the target audience use to select an offering?</p> <p>37. How important is price in the decision process?</p> <p>38. What is the current pricing structure, including discounts, product options, rebates, and so on? Do customers understand it?</p> <p>39. Which of the competitors is considered the price leader? What does the price leader charge for its offering? How does the price leader determine its price?</p> <p>40. What are UDP WHS competitors charging for their offerings?</p> <p>41. What is the perceived value of UDP WHS offering as compared to its price?</p> <p>42. What is the perceived value of UDP WHS offering as compared to its price?</p> <p>43. What service(s) does UDP WHS currently include in the price of their product? What services can they consider now and in the future?</p> <p>44. Are competitive price changes anticipated in the near future? What tourism industry trends are going to drive prices down? What tourism industry trends are going to drive prices up?</p>
5.	Branding	<p>3. What are the specific marketing objectives over the next two years? What objectives address the following as goals?</p> <ul style="list-style-type: none"> • Number of tourists • Revenue • Profit • Market share <p>14. Which Heritage sites or destinations pose the greatest threat, and how do they differentiate themselves? What strategic or tactical elements do they use that threaten UDP WHS's success?</p> <p>15. Which competitors have the largest market share within UDP WHS's target market segments? Which competitors have the greatest visibility with UDP WHS's target audience?</p> <p>16. How will UDP WHS differentiate itself to best combat competition?</p> <p>17. What barriers to entry into the marketplace is UDP WHS creating for itself? What is UDP WHS doing so that it is not easy for others to enter the market place?</p> <p>19. What features and associated benefits does UDP WHS offering provide?</p> <p>20. How does UDP WHS deliver the features identified in item B?</p> <p>21. Of these features, which ones differentiate UDP WHS from the competition?</p> <p>24. What does each of UDP WHS's identified target audiences know and believe about EKZNW today?</p> <p>25. What is the single most important message that must be communicated to ALL of UDP WHS's target audience?</p> <p>31. What is the overall impression about the organization that EKZNW want UDP WHS customers and partners to take away after each interaction with them?</p>

Mapping of Interview Questions to the Themes (Continued)

NO.	THEME	QUESTION
6.	Destination and collaborative marketing	<p>6. What are the key tourism industry trends that are fueling UDP WHS's success? What tourism industry trends can inhibit success?</p> <p>11. Why would someone prefer UDP WHS's offering versus that offered by the competition?</p> <p>13. What categories of competition threaten UDP WHS's success?</p> <p>14. Which Heritage sites or destinations pose the greatest threat, and how do they differentiate themselves? What strategic or tactical elements do they use that threaten UDP WHS's success?</p> <p>16. How will UDP WHS differentiate itself to best combat competition?</p> <p>17. What barriers to entry into the marketplace is UDP WHS creating for itself? What is UDP WHS doing so that it is not easy for others to enter the market place?</p> <p>18. What need is the UDP WHS offering designed to fill?</p> <p>23. What new offerings would UDP WHS's customers most like EKZNW to develop?</p> <p>33. Who is involved, both from EKZNW and from their sales channel partners, in each step of the sales process?</p> <p>34. How does UDP WHS's target audience buy the Site's type of offering? Is the visit an impulse one or a carefully planned visit?</p>

Table 2: Mapping of Interview Questions to the Themes

4.3 Marketing Expectations, Issues, and Goals

This theme is about the expectations, issues and goal that EKZNW has for the UDP WHS and the plans that they might be working towards in terms of marketing (Table 3). The issues relate to challenges that the UDP WHS faces in tourism marketing. The goals are what EKZNW wishes to achieve and which have been or need to be translated into objectives. It is these objectives then that need to be achieved to successfully market the UDP WHS currently and in the future. EKZNW has a marketing department which consists of the senior marketing manager, the domestic and emerging (Black diamond market) market manager, and the travel trade market manager. The Black diamond market is a proper marketing term given to the emerging and emerged black middle and upper class of South Africa (Simpson and Dore, 2007). These three individuals market all the EKZNW services and products; the UDP WHS is only one of these products.

Table 3: Gap Analysis - Marketing Expectations, Issues, and Goals

<u>IDEAL MARKETING STRATEGY</u>	<u>EKZNW/UDP WHS ACTUAL MARKETING APPROACH</u>	<u>GAP</u>
4.3.1 Expectations	Expectations	Expectations
<ul style="list-style-type: none"> To have a well written marketing strategy. 	<ul style="list-style-type: none"> To develop the Park's Eco-cultural tourism and marketing strategy. 	<ul style="list-style-type: none"> EKZNW does not have a written marketing strategy for the UDP WHS. EKZNW needs to have marketing objectives specific for the UDP WHS given its international significance. Currently there is a lack of marketing vision and guidance.
<ul style="list-style-type: none"> To market the World Heritage Site in a way that tourists learn something new. 	<ul style="list-style-type: none"> EKZNW does not have this expectation. 	<ul style="list-style-type: none"> The UDP WHS is not marketed in a way that tourists learn something new. This is linked to the above gap of not having a marketing strategy.
<ul style="list-style-type: none"> To provide information about the eco-cultural dimension and the history of the area. 	<ul style="list-style-type: none"> EKZNW provides this information through their Wildside magazine which is free to its members and available for sale. 	<ul style="list-style-type: none"> There is no gap in this aspect.
<ul style="list-style-type: none"> To market and emphasize the role of the WHS. 	<ul style="list-style-type: none"> EKZNW does not have this expectation. 	<ul style="list-style-type: none"> EKZNW does not encourage visitors and people in general to understand the role of the UDP WHS as a WHS, information that is concentrated on in brochures is of the resort/hutted camps and hiking activities for the whole organisation. Only a few resort/hutted camps within the UDP WHS are included in these brochures.
<ul style="list-style-type: none"> To market the WHS in a manner that creates emotional connection with heritage. 	<ul style="list-style-type: none"> EKZNW does not have this expectation. 	<ul style="list-style-type: none"> People are not being motivated to be proud and want to be associated with the UDP WHS heritage and marketing needs to create that emotional heritage connection so that more people are aware of the UDP WHS.
<ul style="list-style-type: none"> To create strategic partnerships with role players such as municipalities, NGOs and tourism businesses. 	<ul style="list-style-type: none"> EKZNW has partnerships with the World Bank and MDTP. They also have conservation partnerships with the communities adjacent to their Park 	<ul style="list-style-type: none"> EKZNW needs to create strategic partnerships with more national and local role players e.g. municipalities, NGOs and tourism businesses.

Table 3 Gap Analysis - Marketing Expectations, Issues, and Goals (Continued)

<u>IDEAL MARKETING STRATEGY</u>	<u>EKZNW/UDP WHS ACTUAL MARKETING APPROACH</u>	<u>GAP</u>
<ul style="list-style-type: none"> To increase domestic and international market growth. 	<ul style="list-style-type: none"> EKZNW as an organisation and not the UDP WHS specifically want to focus on an aggressive marketing campaign with regards to growing and enhancing current streams and by exploring new opportunities. 	<ul style="list-style-type: none"> There is no gap in this aspect.
<p>How?</p> <ul style="list-style-type: none"> A WHS must use integrated marketing (e.g. Public relations, advertising, sponsorship/publicity, personal selling, sales promotion, merchandising, direct marketing and e-marketing) including partnering with their stakeholders and exploit marketing tools such as the website, travel and tour operators, pamphlets, booklets, brochures, audio visuals, newsletters, events (cultural), exhibitions, press releases, and creating packages that encourage tourists to visit often (e.g. discounts, special offers, and loyalty programs). 	<p>How?</p> <ul style="list-style-type: none"> Website, brochures, exhibitions, ‘word of mouth’, special offers, tour operators, internal audio visuals at limited UDP WHS camps and recently ‘live broadcast’ at some camps. 	<p>How?</p> <ul style="list-style-type: none"> Integrated marketing is needed that embeds other forms of promotion to ensure the right reach of the target markets. Public relations, sponsorship/publicity, personal selling and direct marketing need to be explored for marketing reach effectiveness.
<p>4.3.2 Issues</p>	<p>Issues</p>	<p>Issues</p>
<ul style="list-style-type: none"> Managing carrying capacity within a WHS is usually a challenge. 	<ul style="list-style-type: none"> EKZNW does not have carrying capacity issues however there is uneven distribution of tourists throughout the Park because of accessibility. 	<ul style="list-style-type: none"> Need to identify the Park carrying capacity.
<ul style="list-style-type: none"> Large tourist influx can encourage crime, pollution, and congestion. 	<ul style="list-style-type: none"> Crime is a problem, so security guards are employed during peak seasons in popular camps. There is a UDP Security Strategy. 	<ul style="list-style-type: none"> Tourist directed awareness programme will help reduce crime.
<ul style="list-style-type: none"> Conflicts between tourists and host communities ensure when there is no relationship marketing. Especially when communities feel they don’t benefit from the WHS and that their expectations are not being met. 	<ul style="list-style-type: none"> Access to the Park is gained by travelling through community residential areas and sometimes stones are thrown at tourists vehicles. 	<ul style="list-style-type: none"> Better relationship marketing efforts towards the communities are needed so that there is better treatment of tourists by communities.
<ul style="list-style-type: none"> A WHS has to ensure that no land degradation occurs in the Park 	<ul style="list-style-type: none"> More pollution than degradation in popular sites. There is a Wilderness Area Management Plan- Limit of Acceptable Change. 	<ul style="list-style-type: none"> No gap.

Table 3 Gap Analysis - Marketing Expectations, Issues, and Goals (Continued)

<u>IDEAL MARKETING STRATEGY</u>	<u>EKZNW/UDP WHS ACTUAL MARKETING APPROACH</u>	<u>GAP</u>
<ul style="list-style-type: none"> Employees must be passionate about marketing and conservation to be effective in their posts. 	<ul style="list-style-type: none"> High staff turnover in the marketing department. 	<ul style="list-style-type: none"> Recruiting employees without passion for marketing and the industry. Employees not understanding marketing from the Ecotourism perspective.
<ul style="list-style-type: none"> Marketing for the WHS should be done on a continuous basis and consistently. 	<ul style="list-style-type: none"> Marketing activities are done on <i>ad hoc</i> basis. 	<ul style="list-style-type: none"> Planned marketing activities based on the strategy need to be done on a continuous basis.
<ul style="list-style-type: none"> Focus on the best possible way to manage and develop eco-tourism promotion in the WHS should be eminent. 	<ul style="list-style-type: none"> Managing the development and promotion of eco-tourism facilities within protected areas. 	<ul style="list-style-type: none"> Focus is not being given to how best to manage the development and eco-tourism promotion in the Park.
<ul style="list-style-type: none"> There should be personnel ensuring proper marketing of the WHS to ensure its capability to flourish. 	<ul style="list-style-type: none"> EKZNW marketing department markets the whole organisation's products. 	<ul style="list-style-type: none"> No personnel dedicated to making sure the UDP WHS is well marketed as an entity.
<ul style="list-style-type: none"> WHS marketing personnel should fully understand their role. 	<ul style="list-style-type: none"> Staff (especially from reservations and marketing) spending insufficient time in the UDP WHS in order to understand the product. Internal communication issues due to lack of product knowledge. 	<ul style="list-style-type: none"> Marketing staff not fully understanding their role and not properly planning marketing of the UDP WHS.
<ul style="list-style-type: none"> Marketing leadership should be strong for the WHS. 	<ul style="list-style-type: none"> EKZNW had a gap of two and half years without the marketing manager. 	<ul style="list-style-type: none"> Lack of strong marketing strategy leadership.
<ul style="list-style-type: none"> For effective marketing of the WHS, finances have to be available. 	<ul style="list-style-type: none"> Insufficient financial resources. 	<ul style="list-style-type: none"> Insufficient financial resources lead to the UDP WHS not getting the marketing attention it needs as a WHS.
<p>4.3.3 Goals</p>	<p>Goals</p>	<p>Goals</p>
<ul style="list-style-type: none"> To ensure that marketing initiatives are sensitive to the geological and conservation objectives of the World Heritage Site. 	<ul style="list-style-type: none"> Evidence shows that EKZNW has not yet advanced to the stage of having specific marketing goals for UDP WHS. 	<ul style="list-style-type: none"> No clearly defined marketing goals.
<ul style="list-style-type: none"> To ensure that the principles of sustainability are adhered to in all marketing activities. 	<ul style="list-style-type: none"> EKZNW does not have such a goal in place yet. 	<ul style="list-style-type: none"> Due to lack of strategic marketing, in its planning for UDP WHS, EKZNW has not ensured that principles of sustainability are also engraved in marketing activities.
<ul style="list-style-type: none"> To develop marketing initiatives that will encourage appropriate and responsible eco-cultural tourism. 	<ul style="list-style-type: none"> EKZNW does not have such a goal in place yet. 	<ul style="list-style-type: none"> Linked to the fact that there is no marketing strategy, responsible eco-cultural tourism marketing is not being experienced.

Table 3 Gap Analysis - Marketing Expectations, Issues, and Goals (Continued)

<u>IDEAL MARKETING STRATEGY</u>	<u>EKZMW/UDP WHS ACTUAL MARKETING APPROACH</u>	<u>GAP</u>
<ul style="list-style-type: none"> To increase the economic benefits of tourism to communities. 	<ul style="list-style-type: none"> EKZMW does not have an eco-cultural tourism specific goal in place yet. 	<ul style="list-style-type: none"> Communities are not effectively benefiting from tourism.
<ul style="list-style-type: none"> To convince the private sector of the value of World Heritage status and to ensure that the private sector is actively involved and supportive. 	<ul style="list-style-type: none"> EKZMW does not have such a goal in place yet. 	<ul style="list-style-type: none"> Private sector not actively involved due to weak relations with EKZMW.
<ul style="list-style-type: none"> To link promotion and marketing with the carrying capacity of different sections of the World Heritage Site for different activities. 	<ul style="list-style-type: none"> EKZMW does not have such a goal in place yet. 	<ul style="list-style-type: none"> Non existence of a marketing strategy prevents the linking of carrying capacity to promotion of the Park.
<ul style="list-style-type: none"> To consider all the potential markets for a World Heritage Site, including those related to relevant specialist activities including arts and culture and education. 	<ul style="list-style-type: none"> EKZMW does not have such a goal in place yet. 	<ul style="list-style-type: none"> It is not clear who are the exact target market/s is/are. Instead, the stakeholders are the ones who have exploited the arts and culture and the education markets. EKZMW has to consider all of the WHS potential markets for the UDP WHS.
<ul style="list-style-type: none"> To integrate the marketing of the World Heritage Site with wider marketing initiatives and avoid duplication of marketing effort. 	<ul style="list-style-type: none"> EKZMW does not have such a goal in place yet. 	<ul style="list-style-type: none"> There is no Marketing integration and marketing efforts are being duplicated between EKZMW and its stakeholders.
<ul style="list-style-type: none"> Encourage all year round visits through integrated marketing communication. 	<ul style="list-style-type: none"> EKZMW does not have such a goal in place yet. 	<ul style="list-style-type: none"> All year round visits are expected but not effectively pursued.
<ul style="list-style-type: none"> To increase quality of visitor experience. First the target segments have to be known so that they can be better satisfied. Visitors expect reliability, assurance, empathy and responsiveness. Quality is measured through reduced complaints, not worrying about price competition and having good employees. 	<ul style="list-style-type: none"> EKZMW does not have such a goal in place yet. 	<ul style="list-style-type: none"> Quality visitor experience needs to increase. There is a lack of marketing strategy and known target segments.
<ul style="list-style-type: none"> To utilize the recognition of the World Heritage Site to strengthen the local economy and performance of tourism enterprises in the surrounding area. 	<ul style="list-style-type: none"> EKZMW does not have such a goal in place yet. However tourism businesses are benefiting from WHS status. 	<ul style="list-style-type: none"> This would be enhanced by relationship marketing which is absent at the moment.
<ul style="list-style-type: none"> To increase awareness, understanding and enjoyment of the special qualities of the Site amongst local people, local enterprises, educational groups and all types of visitors. 	<ul style="list-style-type: none"> EKZMW does not have such a goal in place yet. 	<ul style="list-style-type: none"> This has not been effectively encouraged and promoted.

4.4 Market Information Gathering

This theme is about information that EKZNW collects about the UDP WHS (Table 4). Offering something better than what the competitors might be offering and gaining an advantage is the key to success and even survival. Market knowledge gathering consists of information on external factors such as political, economical, technological and socio-cultural factors that might influence how UDP WHS is marketed. It also includes collecting information on the tourism industry: the needs of the customers, competitor analysis, internal needs, SWOT analysis and PEST analysis.

Table 4: Gap Analysis - Market Information Gathering

<u>IDEAL MARKETING STRATEGY</u>	<u>EKZNW/UDP WHS ACTUAL MARKETING APPROACH</u>	<u>GAP</u>
4.4.1 Industry analysis	Industry analysis	Industry analysis
<ul style="list-style-type: none"> A WHS should collect a range of information about cultural heritage products in order to understand the increasing cultural and heritage tourism demand. 	<ul style="list-style-type: none"> EKZNW only collects information on revenues that the camps make; the number of visitors to the Park gates; and the accommodation occupancy rates. There is no information being collected on cultural and heritage product demand. 	<ul style="list-style-type: none"> EKZN does not collect information on tourism demand yet this is vital in understanding the cultural and heritage product which they offer.
<ul style="list-style-type: none"> Information on the proper marketing of WHS, specifically success cases and not so successful cases. 	<ul style="list-style-type: none"> EKZNW does not collect this type of information. 	<ul style="list-style-type: none"> EKZNW should collect information on WHS marketing and learn from it.
<ul style="list-style-type: none"> Information about competition, trends, customer behaviour and needs should be collected on an ongoing base. 	<ul style="list-style-type: none"> There is a tendency to rely on KZNTA for information on tourism and marketing which is a general reflection of the whole province. 	<ul style="list-style-type: none"> Not collecting information about competition, trends, customer behaviour and needs is a missed opportunity in understanding UDP WHS customers and their relationship with the Park's product.

Table 4: Gap Analysis - Market Information Gathering (Continued)

<u>IDEAL MARKETING STRATEGY</u>	<u>EKZNW/UDP WHS ACTUAL MARKETING APPROACH</u>	<u>GAP</u>
<p>4.4.2 PEST</p> <p>A WHS should have an environmental scanning system in place for gathering information.</p>	<p>PEST</p> <p>The information on PEST analysis is only collected and kept on an ad hoc basis.</p>	<p>PEST</p> <p>There is no formal and solid environmental scanning system in place to help in PEST analysis (political, economical, socio-cultural and technological aspects).</p>
<p>Political</p> <ul style="list-style-type: none"> Political influence both internal and external can affect the image of the WHS as well as have an impact on future tourism development. 	<p>Political</p> <ul style="list-style-type: none"> There are conflicting views between the conservation and tourism activities e.g. protection versus tourism development in the Park. 	<p>Political</p> <ul style="list-style-type: none"> There is a need to politically realise that conservation and tourism development benefit one another if done responsibly. This can be done through careful planning, strategic marketing management and cooperation from all stakeholders.
<p>Economic/financial</p> <ul style="list-style-type: none"> A WHS should get its funds from its geographic region (e.g. through taxes) and foreign revenue for the country and as well as through tourism, mainly the domestic market. This market has to be continually encouraged to visit so that tourism revenues are maintained A WHS host communities should not have to incur an increased cost-of-living due to tourist influx and outside investments. As much as possible host community's income or employment should be permanent, not seasonal. Competitive, stable marketing infrastructure and services. 	<p>Economic/financial</p> <ul style="list-style-type: none"> EKZNW gets funds from the government and the World Bank. Domestic market has been affected by the global economic downturn and EKZNW camps are at a very low occupancy of 48%. There is tourism demand for rebuilding the hotel at the Royal National Park associated with the British Royal Family. This will provide more employment to the locals, but communities will have to pay more if they wish to use such facilities. Park only busy during events and peak season. EKZNW is unable to compete with private businesses; they have better marketing resources, services and activities. 	<p>Economic/financial</p> <ul style="list-style-type: none"> More focus is needed to encourage the domestic market to visit the Park and increase occupancy. Tourism demand needs to enhance the economy of the local communities not strain it. EKZNW has to encourage all year visitations to the Park. Marketing instability hinders EKZNW to better serve the markets.

Table 4: Gap Analysis - Market Information Gathering (Continued)

<u>IDEAL MARKETING STRATEGY</u>	<u>EKZNW/UDP WHS ACTUAL MARKETING APPROACH</u>	<u>GAP</u>
Social/Cultural	Social/Cultural	Social/Cultural
<ul style="list-style-type: none"> Exposure to new and better lifestyles due to better economy should encourage unity with the WHS local communities. 	<ul style="list-style-type: none"> There is a lot of infighting within local communities, which has caused some areas of the Park to close down and not allow visitors. 	<ul style="list-style-type: none"> Effective management of the relationship between local communities is of paramount importance to sustainability of Park activities.
<ul style="list-style-type: none"> Maintenance of traditional knowledge and loss of traditional knowledge products. 	<ul style="list-style-type: none"> EKZNW maintains a relationship with individuals such as traditional healers and Izangoma to ensure minimum loss of traditional knowledge. 	<ul style="list-style-type: none"> There is no significant loss of traditional knowledge however this knowledge is hugely limited only to the few.
<ul style="list-style-type: none"> Enhanced local expectations due to exposure to affluent visitors. 	<ul style="list-style-type: none"> Due to the status of UDP WHS, locals expect better lifestyle, business opportunities and employment. 	<ul style="list-style-type: none"> There is no gap in this aspect.
Technological	Technological	Technological
<ul style="list-style-type: none"> Improvement of technology usage in destinations. 	<ul style="list-style-type: none"> EKZNW has not yet invested in this. 	<ul style="list-style-type: none"> EKZNW needs to stay afloat of technological improvements to help better market UDP WHS.
<ul style="list-style-type: none"> Improved database marketing. 	<ul style="list-style-type: none"> EKZNW has not yet used or invested in this tool. 	<ul style="list-style-type: none"> Exploring database marketing will ensure that EKZNW maintains constant relationship with the UDP WHS visitors.
<ul style="list-style-type: none"> Improved central reservations systems. 	<ul style="list-style-type: none"> EKZNW is putting a new reservation system in place which will be accessible to its Camp managers as well. 	<ul style="list-style-type: none"> There is no gap in this aspect.
<ul style="list-style-type: none"> Ability to compete with any WHS that has eco-cultural and historical background through digital innovation. 	<ul style="list-style-type: none"> EKZNW is currently focusing on competing for accommodation for all their Parks instead of destination or Site against other destinations. 	<ul style="list-style-type: none"> Digital innovation can give EKZNW a competitive advantage in accommodation and overall destination attractiveness of the UDP WHS.

Table 4: Gap Analysis - Market Information Gathering (Continued)

<u>IDEAL MARKETING STRATEGY</u>	<u>EKZNW/UDP WHS ACTUAL MARKETING APPROACH</u>	<u>GAP</u>
4.4.3 SWOT analysis and Competitor analysis	SWOT analysis and Competitor analysis	SWOT analysis and Competitor analysis
<ul style="list-style-type: none"> It is critical that the advantages of the WHS be sustainable. 	<ul style="list-style-type: none"> The UDP WHS has the advantage of being a WHS site. 	<ul style="list-style-type: none"> There is no gap in this aspect.
<ul style="list-style-type: none"> Brand name recognition, exclusive rights to manage a scarce resource is real competitive advantage that cannot be easily copied. 	<ul style="list-style-type: none"> EKZNW does not yet have a unique usable brand for the UDP WHS as an ecotourism destination. 	<ul style="list-style-type: none"> EKZNW needs to gain competitive advantage though a unique ecotourism brand for the UDP WHS.
<ul style="list-style-type: none"> Every WHS has a unique set of strengths, and it's critical that each WHS identifies these, as well as its competitors'. It is critical that WHS has a thorough SWOT analysis in order to understand its position in terms of Strengths, Weaknesses, Opportunities and Threats. This analysis helps see how the strengths stack up against competitors' weaknesses and suggests ways to take advantage of marketplace opportunities. 	<ul style="list-style-type: none"> See attached (Annexure B) for the UDP WHS's SWOT analysis. This analysis was developed by this study. 	<ul style="list-style-type: none"> The SWOT analysis tool is not being used to give EKZNW's UDP WHS competitive advantage. In fact UDP WHS has not developed this tool to better market itself.

4.5 Segmentation, Targeting, Positioning

This theme looks at how EKZNW does their segmentation, targeting and positioning to better market the UDP WHS (Table 5). Segmentation is about separating the markets into groups that might share similar characteristics and developing marketing mixes for each. Its main purpose is to identify and profile segments with varying degrees of buying potential. If done properly segmentation will help to insure the highest return for marketing expenditures. Targeting is about choosing which market the organisation can best serve considering its current resources. Positioning linked to branding on the other hand deals with developing a marketing mix that gives an organisation a competitive advantage with its chosen market.

Table 5: Gap Analysis – Segmentation, Targeting and Positioning

<u>IDEAL MARKETING STRATEGY</u>	<u>EKZNW/UDP WHS ACTUAL MARKETING APPROACH</u>	<u>GAP</u>
<p>4.5.1 Segmentation</p> <ul style="list-style-type: none"> • A WHS should identify criteria for segmenting the market and develop its segment profiles. 	<p>Segmentation</p> <ul style="list-style-type: none"> • EKZNW is segmenting its products and not visitors. This shows that segmentation is not well understood. 	<p>Segmentation</p> <ul style="list-style-type: none"> • The actual markets have to be segmented and their profiles known to better meet their needs.
<p>The following segments are more relevant to the World Heritage Site.</p> <ul style="list-style-type: none"> • Domestic long holidays, domestic short breaks, overseas visitors, activity and special interest breaks, educational groups and business tourism. <p>In some high-profile protected areas an important source of income is retired Western tourists, who are on package of ‘must see’ places along with their friends.</p>	<ul style="list-style-type: none"> • UDP WHS gets visitors from the domestic and international market. Sports e.g. mountain biking is becoming very popular in South Africa and UDP WHS has embraced this trend. 	<ul style="list-style-type: none"> • EKZNW should consider these segments for the UDP WHS: domestic long and short holidays, special interest breaks especially eco-tourism and educational groups.
<p>4.5.2 Targeting</p> <ul style="list-style-type: none"> • WHS need to assess the segment attractiveness and select the target market segments. Four targeting approaches are available for WHS: niche marketing, differentiated marketing, undifferentiated marketing and customised marketing. Niche marketing is more ideal for a WHS as concentration and marketing efforts are directed to one segment. Due to the diversity of products and offering in a WHS undifferentiated marketing is sometimes ideal but WHSs should be wary of this approach as there are a few WHS offerings that satisfy all or most visitors. 	<p>Targeting</p> <ul style="list-style-type: none"> • Current marketing efforts by EKZNW suggest that undifferentiated marketing approach is being used as anyone and everyone is expected to visit the Park. Cultural tourism is a niche market for UDP WHS. The Black diamond market (black local market) has been identified as a growth point for EKZNW. This market is being explored to increase visitor numbers to EKZNW’s Parks. 	<p>Targeting</p> <ul style="list-style-type: none"> • The Black diamond market as identified by EKZNW is not based on eco-tourism, but on other entertainment activities such as concerts. Emerging markets (staying with local family) is another market UDP WHS can tap into especially for its surrounding communities as a community based project.
<p>4.5.3 Positioning</p> <ul style="list-style-type: none"> • WHSs need to position for each segment chosen/targeted and adapt marketing mix components for each segment. This includes selecting the right competitive advantage and communicating it to the targeted segment. 	<p>Positioning</p> <ul style="list-style-type: none"> • There is an advertising campaign directed at the Black diamond market for the province of KwaZulu-Natal. Concerts and parties are being used to draw the Black diamond market to EKZNW’ Parks. 	<p>Positioning</p> <ul style="list-style-type: none"> • Markets have not been properly segmented such that EKZNW capitalises on each of these markets.

4.6 Marketing and Destination Mix

This theme discusses UDP WHS's tourism marketing mix (Table 6). The marketing mix is really one of the most important concepts in marketing and is the core of all marketing planning. There are 8Ps in tourism which need to be considered for strategy formulation. The 8Ps of this mix are: product; place (distribution); price; promotion; people; partnership; packaging and programming. The theme will also present the tourism destination mix for the UDP WHS focusing on accessibility, attractions, amenities and ambiance.

Table 6: Gap Analysis - Marketing and Destination Mix

<u>IDEAL MARKETING STRATEGY</u>	<u>EKZNW/UDP WHS ACTUAL MARKETING APPROACH</u>	<u>GAP</u>
<p>4.6.1 Marketing mix</p>	<p>Marketing mix</p>	<p>Marketing mix</p>
<ul style="list-style-type: none"> • Product- Accommodation, traditional food, service provision by employees, cultural restaurants, cultural interpretive centre's, natural features. The perceived benefits provided to meet the needs and wants of tourists, equality of service received and the value for money delivered must be assessed against the competition of the WHS. 	<ul style="list-style-type: none"> • Product – UDP WHS has a wide product range including the Rock art, caves, hiking trails, history and cultural background of the mountains, grasslands, geography, horse rides, bird viewing, trout dams and hotels/resorts. 	<ul style="list-style-type: none"> • Product – Perceived benefits, equality of service received and value for money not provided by EKZNW.
<ul style="list-style-type: none"> • Pricing- the pricing strategy should complement the target market and must consider time of purchase, type of consumers, provision of discounts to the domestic customers, and use of bundle pricing. Value proposition - A WHS must recognize that each visitor has different needs and wants, this ensures effective value proposition. The customer's needs change and value propositions therefore must be updated to meet the changing needs of customers. This again can only be done through thorough marketing. The WHS must remember that its competition is trying to develop and communicate their value as well. 	<ul style="list-style-type: none"> • Pricing - Locals complain about the price being too high. As a result EKZNW is considering unit tariff instead of charging per person. 	<ul style="list-style-type: none"> • Pricing – EKZNW as a whole does not have a pricing strategy in place and there isn't one for UDP WHS. Awareness and education is needed to help locals understand pricing for the protected areas and its impact on the environment so that value for money is conveyed.

Table 6: Gap Analysis - Marketing and Destination Mix (Continued)

<u>IDEAL MARKETING STRATEGY</u>	<u>EKZNW/UDP WHS ACTUAL MARKETING APPROACH</u>	<u>GAP</u>
<p>In order for the WHS to be successful the value proposition must be differentiated and superior to all others. A WHS needs to make sure that it delivers real value in terms of its eco-cultural products.</p>		
<ul style="list-style-type: none"> • Promotion –WHS should use promotional techniques such as advertising, selected mediums such as radios, internet marketing, printed literature such as brochures, direct marketing and public relations. <p>The promotion strategy can be formed once the segmentation, targeting and positioning has been done and the purpose of it is that: It engages stakeholders and staff in the heritage site and the conservation of the area; It engages the public in the heritage site; It targets the key market segments that managers wish to reach; and it creates reasons to return, and critically, return on a regular basis.</p> <p>Target market Understand their needs and wants-(Eco-cultural) Identified markets for a WHS:</p> <ul style="list-style-type: none"> • Domestic long holidays, domestic short breaks, overseas visitors, cultural tourists, educational groups, and business tourism. <p>Message</p> <ul style="list-style-type: none"> • Must be easily interpreted; Must be understood by market; and Should coincide with WHS. <p>Message to target market</p> <ul style="list-style-type: none"> • Protect heritage (eco-cultural) in area; Get involved; Reduce negative impacts; Be proud of culture; and Embrace culture <p>Message delivery</p> <ul style="list-style-type: none"> • Marketing integration is preferred to reach different segments targeted. These can include: Posters, Radio, Television, Newsletters, Brochures, Exhibitions and Website. 	<ul style="list-style-type: none"> • Promotion – EKZNW uses radio, internet (organisation website), and brochures to market the organisation’s products. <p>Proper and formal process of segmentation, targeting and positioning has not yet been done.</p> <p>Target market</p> <ul style="list-style-type: none"> • International market, domestic market, and domestic Black diamond market. <p>Message</p> <ul style="list-style-type: none"> • General message for all EKZNW protected areas: ‘Masihlale ndawonye’ (Let’s stay together) so there is no specific message for the UDP WHS as yet. <p>Message delivery</p> <ul style="list-style-type: none"> • Brochures and Radio. 	<ul style="list-style-type: none"> • Promotion – No database marketing, direct marketing and public relations is being used to market UDP WHS. Promotion strategy aiming at the stakeholders, local communities, and target markets needs does not yet exist. <p>Target market</p> <ul style="list-style-type: none"> • Emerging markets and school/educational groups <p>Message</p> <ul style="list-style-type: none"> • Only emphasises accommodation sector and not the environment in which ecotourism thrives. The message has to be unique to UDP WHS. <p>Message delivery</p> <ul style="list-style-type: none"> • Integration is needed as target markets are very different and manner in which they must be approached will depend on their profile.

Table 6: Gap Analysis - Marketing and Destination Mix (Continued)

<u>IDEAL MARKETING STRATEGY</u>	<u>EKZNW/UDP WHS ACTUAL MARKETING APPROACH</u>	<u>GAP</u>
<ul style="list-style-type: none"> • Place- Relationship marketing is important in channels of distribution. The channels can be direct and indirect to capitalize on the tourists spend. Marketing initiatives should complement the WHS's unique selling features. Distribution channels to promote WHS include CD's/ DVD's and tourists information centres 	<ul style="list-style-type: none"> • Place – UDP WHS visitors book directly with EKZNW. Tour operators and travel agencies work closely with private businesses as well as with EKZNW through its travel trade to organise accommodation booking and group entrances to the Park. 	<ul style="list-style-type: none"> • Place – Need to emphasise relationship marketing as a tool for distribution strategies in UDP WHS.
<ul style="list-style-type: none"> • People- people such as employees, communities, investors, domestic and overseas tourists, businesses and universities all play a crucial role in sustaining the WHS and they all need one another. 	<ul style="list-style-type: none"> • People – EKZNW has relations with some stakeholders. Communities have been encouraged to be part of the tourism industry in the UDP WHS and they participate by becoming tourists guides, selling crafts, and offering village tours. 	<ul style="list-style-type: none"> • People – The interdependency of all UDP WHS's stakeholders has not yet taken priority. Businesses have formed alliances with each other instead as they feel EKZNW is not interested in forming good relations with them.
<ul style="list-style-type: none"> • Partnership- should be created with international and local investors, the customer that the site is targeting, travel agents and tour operators, local communities, private and governmental organization as this will help ensure effective marketing. 	<ul style="list-style-type: none"> • Partnership – No trust among stakeholders. 	<ul style="list-style-type: none"> • Partnership – The role of EKZNW is not clearly understood and this results in unrealistic expectations from the organisation and causes conflict among stakeholders.
<ul style="list-style-type: none"> • Programming –introducing educational eco- cultural programs ensure sustainability of a WHS. Packaging – a WHS can work with other organisations such as the car rental companies, tour operators, amazing race, and shot left in order to create an ultimate eco-cultural experience. 	<ul style="list-style-type: none"> • Packaging and Programming – EKZNW has not yet made effort to concentrate on this aspect of their service. 	<ul style="list-style-type: none"> • Packaging and Programming – Overall appearance of the UDP WHS has been hindered by lack of good relations with stakeholders.

Table 6: Gap Analysis - Marketing and Destination Mix (Continued)

<u>IDEAL MARKETING STRATEGY</u>	<u>EKZNW/UDP WHS ACTUAL MARKETING APPROACH</u>	<u>GAP</u>
4.6.2 Destination Mix	Destination mix	Destination mix
<ul style="list-style-type: none"> • Accessibility – Transportation and infrastructure are necessary to help ensure that the visitor has accessibility to the destination. WHSs attract high numbers of visitors and this means that there are usually issues of accessibility, transport and other service provision which need to be considered and solved through appropriate management techniques. 	<ul style="list-style-type: none"> • Accessibility – Some parts of the UDP WHS are difficult to access due to poor road infrastructure. 	<ul style="list-style-type: none"> • Accessibility- Road infrastructure needs attention within the UDP WHS.
<ul style="list-style-type: none"> • Attractions – attractions and events play the key role in tourism destinations as they entice visitors to the destination. WHSs have natural attractions, built attractions and cultural attractions. 	<ul style="list-style-type: none"> • Attractions – Forming parts of attractions are the mountains and water catchment areas, built attractions such as camps, lodges, and hotels, and cultural attractions such as Rock art paintings. 	<ul style="list-style-type: none"> • Attractions – Events around cultural heritage of the Site are lacking.
<ul style="list-style-type: none"> • Amenities – WHS should have comfortable accommodation, beautiful mountain views, adventure activities, and excellent dining options. 	<ul style="list-style-type: none"> • Amenities – The amenities are limited due to the nature of the UDP WHS product but there are mountain views, hiking and good dining options. 	<ul style="list-style-type: none"> • Amenities – Ecotourism is activities based and EKZNW must capitalise on that and offer as much ecotourism activities as possible.
<ul style="list-style-type: none"> • Ambience – WHS should create an environment that is friendly for all stakeholders. Customers need to feel a sense of being appreciated, safe and belonging in order to create an unforgettable experience. This plays a huge role in ensuring that the customers are loyal to the WHS. 	<ul style="list-style-type: none"> • Ambience – There is beautiful cultural and social ambience in some parts of the UDP WHS whilst a negative ambience exists in other areas because of community infighting. 	<ul style="list-style-type: none"> • Ambience – Infighting within communities and crime including rape, car hijacking, robbery and theft need to be addressed for the purpose of making customers feel safe.

4.7 Branding

This theme discusses the current status of branding used by EKZNW for UDP WHS (Table 7). EKZNW uses dual branding as UDP WHS is an offering/product that carries both the corporate identifier (the EKZNW brand) and an individual product brand (UDP WHS brand). EKZNW emphasises the corporate brand because all their products are interrelated i.e. they are all protected areas.

Table 7: Gap Analysis - Branding

<u>IDEAL MARKETING STRATEGY</u>	<u>EKZNW/UDP WHS ACTUAL MARKETING APPROACH</u>	<u>GAP</u>
Branding	Branding	Branding
<ul style="list-style-type: none"> Has an approach that puts emphasis on the World Heritage Site as a destination and an experience. The marketing strategy consists of the eco-cultural phenomena's of the World Heritage Site's authenticity. 	<ul style="list-style-type: none"> EKZNW does not have this approach. 	<ul style="list-style-type: none"> EKZNW needs to have an approach emphasising a holistic destination experience of the UDP WHS.
<ul style="list-style-type: none"> All stakeholders (community, public and private sector) should work in unison to promote the World Heritage Site brand while providing the experience and quality the site has to offer. 	<ul style="list-style-type: none"> All stakeholders work individually to promote their businesses using the UDP WHS as a draw card. 	<ul style="list-style-type: none"> No collaborative marketing efforts with stakeholders leading to duplication and waste of resources. Unity is required to promote the UDP WHS.
<ul style="list-style-type: none"> Have one clear and simple brand name for the site that reflects the tranquillity, ambience and cultural aspects of the World Heritage Site. 	<ul style="list-style-type: none"> EKZNW uses the organisation's brand for all its products and the UDP WHS as an offering carries both the EKZNW brand and its own individual brand. 	<ul style="list-style-type: none"> There is no brand for the UDP WHS as an ecotourism destination that all stakeholders can also use and be associated with.
<ul style="list-style-type: none"> Effectively communicate and promote the World Heritage Site's status by using emblems. 	<ul style="list-style-type: none"> At the moment EKZNW is focusing on promoting certain resort/hutted camps only and not the whole Park as a WHS. All UDP WHS brochures carry the UNESCO emblem. 	<ul style="list-style-type: none"> Emblems need to be used for effective promotion of the whole of the UDP WHS.

Table 7: Gap Analysis – Branding (Continued)

<u>IDEAL MARKETING STRATEGY</u>	<u>EKZNW/UDP WHS ACTUAL MARKETING APPROACH</u>	<u>GAP</u>
<ul style="list-style-type: none"> • Have a developed name and brand image for the site. 	<ul style="list-style-type: none"> • EKZNW has not given attention on brand image for the Site yet. 	<ul style="list-style-type: none"> • Brand image and name needs attention and careful planning.
<ul style="list-style-type: none"> • Have a welcoming ambience of the World Heritage Site in order to communicate the personality of the destination to the target market. 	<ul style="list-style-type: none"> • EKZNW does not yet have plans for this drive. 	<ul style="list-style-type: none"> • The UDP WHS needs to have a personality as a destination that will be used a welcoming ambience to targeted markets.
<ul style="list-style-type: none"> • A World Heritage Site must consist of well developed (eye-catching and strong) icons that create memorability of the site. 	<ul style="list-style-type: none"> • All EKZNW UDP WHS brochures consist of the amphitheatre as the Park’s icon. 	<ul style="list-style-type: none"> • The icon is not eye-catching and needs to be redesigned so that it is more effective and create memorability for the UDP WHS.
<ul style="list-style-type: none"> • Consist of a well developed slogan that will be understood by tourists and potential tourists. The slogan should be based on the product that is offered at the site inclusive of attractions and the general community within the site area. 	<ul style="list-style-type: none"> • EKZNW uses a general slogan for all their parks: ‘Hlalanathi’ (Stay with us). 	<ul style="list-style-type: none"> • The UDP WHS does not have such a slogan and it needs to be developed.
<ul style="list-style-type: none"> • A World Heritage Site should have an intensive brand identity that will integrate and build an emotional link with the site and tourists. 	<ul style="list-style-type: none"> • EKZNW does not yet have this in place. 	<ul style="list-style-type: none"> • There is no brand identity which integrates an emotional link with the site.
<ul style="list-style-type: none"> • Create links or partnerships with the corporate sector and the World Heritage Site in order to uplift the site and in turn benefit the corporate sector in engaging in cultural, social and environment issues. Also partnerships with the corporate sector in terms of strategic marketing must be developed in order to enhance the image of the site. 	<ul style="list-style-type: none"> • EKZNW does not have such links or partnerships. 	<ul style="list-style-type: none"> • No marketing partnerships exist with the private sector.
<ul style="list-style-type: none"> • The World Heritage Site should meet customer’s needs and thus maintain customer satisfaction in order to increase the brand value of the site. 	<ul style="list-style-type: none"> • The increasing revenue figures suggest that customers are happy with the Park products but there is no proof that brand value has increased, especially since the brand itself needs to be carefully constructed. 	<ul style="list-style-type: none"> • There is a minimum gap in customer satisfaction and the brand value of the UDP WHS is not known.
<ul style="list-style-type: none"> • World Heritage Site should have members that are in partnership with the site and have access to use the site logo or emblems, through links that are created within the site’s website and the website of members involved with the World Heritage Site. 	<ul style="list-style-type: none"> • EKZNW does not have members in partnership with the UDP WHS and thus no organisation or individual can use their logos, this is mainly a legal matter. 	<ul style="list-style-type: none"> • Not one common brand name for the Site, e.g. municipalities, businesses and tourist information centres use different emblems and brand to promote the same destination.

4.8 Destination and Collaborative Marketing

This theme presents collaborative marketing efforts that EKZNW might have with various stakeholders in the UDP WHS (Table 8). It is closely linked to the branding theme.

Table 8: Gap Analysis – Destination and Collaborative Marketing

<u>IDEAL MARKETING STRATEGY</u>	<u>EKZNW/UDP WHS ACTUAL MARKETING APPROACH</u>	<u>GAP</u>
Destination and collaborative Marketing	Destination and collaborative Marketing	Destination and collaborative Marketing
<ul style="list-style-type: none"> • Destination and collaborative marketing is the heartland of tourism marketing. 	<ul style="list-style-type: none"> • Tourism KwaZulu-Natal markets the whole province including EKZNW's product. 	<ul style="list-style-type: none"> • EKZNW has no marketing collaboration with other tourism stakeholders in UDP WHS.
<ul style="list-style-type: none"> • The WHS destination itself should be the catalyst link that precipitates all the other industries in the tourism sector. 	<ul style="list-style-type: none"> • At the moment EKZNW has not positioned itself as such, however tourism businesses use the Site to promote their establishments. 	<ul style="list-style-type: none"> • EKZNW has not taken the stand to be the link between all tourism related businesses in the UDP WHS area.
<ul style="list-style-type: none"> • Natural resources, climate and culture should shape the form of tourism marketing in natural destinations such as WHSs. 	<ul style="list-style-type: none"> • EKZNW has identified a gap in tourism marketing and wants to have an eco-tourism marketing strategy for the UDP WHS. 	<ul style="list-style-type: none"> • EKZNW needs to focus on Eco-cultural tourism as a natural destination.
<ul style="list-style-type: none"> • Marketing of a WHS needs to be done collaboratively for the holistic image of the destination to be conducive and succeed in a long run. 	<ul style="list-style-type: none"> • The municipalities, tourist information centres and tourism businesses in the UDP WHS area market the whole Park but not in collaboration with EKZNW. 	<ul style="list-style-type: none"> • Marketing efforts to promote the UDP WHS are not done in conjunction with the stakeholders and this creates duplication and is a waste of resources.
<ul style="list-style-type: none"> • Government support and creation of private sector partnerships is needed to market the WHS as a destination. 	<ul style="list-style-type: none"> • EKZNW has the government support as a parastatal organisation but does not have solid and fruitful marketing relationships with the private sector. 	<ul style="list-style-type: none"> • EKZNW must work on relationship marketing in partnering with the private sector for better marketing of the UDP WHS.

4.9 Summary

This chapter presented an analysis of the research results. Marketing certainly is done even though it is on *ad hoc* bases; there is one goal so far for UDP WHS to develop a marketing strategy for the area. There are a number of issues needing attention including: allocating staff to market the UDP WHS specifically instead of the whole EKZNW resort/hutted camps as currently there is no division doing this. Information is not being collected and no marketing research is done to help direct future marketing decisions for UDP WHS. The use of a SWOT analysis would be a step towards the right direction in terms of better marketing for the UDP WHS. Segmentation is not being conducted to understand who the UDP WHS customers are. The marketing and destination mix suggest that UDP WHS is a good destination and product worthy to be marketed in full to reach the desired tourism potential. There is great need for marketing collaboration between stakeholders and EKZNW so there is enough pool of resources.

CHAPTER 5

DISCUSSION: ECO-CULTURAL MARKETING STRATEGY

5.1 Introduction

This chapter discusses the interpretation of data collected based on the six identified themes. The themes are:

- Marketing goals, issues and expectations;
- Market information gathering;
- Segmentation, targeting and positioning;
- Marketing and destination mix; branding; and
- Destination and collaborative marketing.

It discusses the short falls in marketing of the UDP WHS based on the ideal marketing strategy as explained in Chapter 4. The chapter will also discuss the good marketing practices that EKZNW has and uses for the marketing of the UDP WHS.

5.2 Marketing Expectations, Issues, and Goals

EKZNW has the mandate to manage the development and promotion of ecotourism facilities within protected areas. EKZNW does not have specific marketing and SMART (Specific, Measurable, Actionable, Realistic, and Time-framed) objectives as suggested by George (2004) for the UDP WHS. This is because their marketing efforts are not Park specific. A marketing gap has however been identified and EKZNW wishes to develop the Park Eco-cultural tourism and marketing strategy. This gap was actually identified by the stakeholders and not by EKZNW during the developmental stages of the IMP for the UDP WHS. Only the UDP WHS Park personnel and stakeholders were involved in this process. The marketing department and personnel were not part of it and therefore did not even know that such a goal was ever suggested. As an organisation, EKZNW is planning to focus on an aggressive marketing strategy with regards to growing and enhancing current revenue streams and by exploring new opportunities (EKZNW, 2009). Currently the marketing department markets the whole

organisation's products to visitors. Advertising of UDP WHS is mostly through word of mouth which the EKZNW staff feel is a result of their good service.

“most of the visitors have been visiting the same camp for many years and they refer their friends to this [UDP WHS] Park” (Hospitality manager 5).

This statement makes marketing staff comfortable and it is taken for granted that the Park is selling itself. While visitors might come back to visit, EKZNW still needs to ensure that it has a good customer retention program in place. Word of mouth is one of the very powerful techniques of advertising and this 'hidden sales force' may be the most effective of all the communication techniques. If visitors to UDP WHS have a satisfactory experience as expressed by the EKZNW staff, then it is likely that they will purchase again and the likelihood of positive Word of mouth input will be high (George, 2004). As good as this may be especially since it costs the organisation less, marketing can not be left at the consumers' hands. It still needs to be properly planned.

“Failure in planning is largely attributed to lack of marketing vision and guideline” (Marketing manager 1).

Evidently marketing activities for the UDP WHS are mostly done on *ad hoc* bases. In an interview, a EKZNW manager did not know what UDP WHS stands for and had no idea what the IMP is. Yet these are the people tasked to market the organisation as a whole. According to the IMP objectives for UDP WHS, developing the Park Eco-cultural tourism and marketing strategy is a high priority (EKZNW, 2005). This has not been done; therefore marketing objectives for the Park have not yet been set. There is a weakness in the current system in terms of marketing staff not fully understanding their role and therefore not properly planning marketing of the UDP WHS.

“There is high a staff turnover in the marketing department and those that do remain are sometimes not sure what they are supposed to be doing and how it should be done. Management should recruit employees with passion for marketing and the industry” (Hospitality manager 1).

The above statement is directly related with the fact that the senior marketing manager post at EKZNW was vacant for almost three years between 2006 and 2009.

Bushell & Eagles (2007) stress the importance of the Park agency to know what it expects in terms of marketing goals and what it seeks to achieve. If these are not properly set, the direction which EKZNW needs to take in marketing UDP WHS will not be clear. These objectives as set out in the ideal marketing strategy, and should revolve around ensuring that marketing initiatives are sensitive to the conservation objectives of the UDP WHS; that the principles of sustainability are adhered to in all marketing activity; that the development of marketing initiatives encourage appropriate and responsible tourism; that the private sector is actively involved and understand the value of a WHS; that all the potential markets for UDP WHS are considered; that integrated marketing of the UDP WHS with wider marketing initiatives is ensured to avoid duplication of marketing efforts.

As supported by literature, the study found that EKZNW has similar marketing issues as most of the organisations including communications, resource allocation, and strategic leadership among others (Kotler, 2000; Kotler & Armstrong, 2006; Jooste *et al.*, 2009). Developing marketing strategies is to translate current conditions into desired situations (Heath & Wall, 1992). EKZNW's current conditions and issues including high staff turnover, *ad hoc* marketing activities, internal communication issues and scarce resource allocation can all be changed through proper management techniques into more desirable situations. It is evident from the interviews that some EKZNW staff are aware of these conditions but are not sure how to deal with them as they have to be attended to strategically by the organisation.

To date EKZNW does not have a marketing strategy as defined by this study for the UDP WHS and this limits the tourism growth potential and opportunities. Marketing of UDP WHS is largely through the initiatives of individual operators, hotels and agents. EKZNW needs to develop a marketing strategy for the UDP WHS to attract and retain loyal international and domestic tourists. Kotler *et al.*, (1993) warns that places who fail to market themselves successfully face the risk of economic stagnation and decline. The key elements or ingredients of a successful tourism marketing strategy are product or service promotion, pricing, place and distribution strategies, internal marketing, positioning, corporate sponsorship, alliance building and branding amongst others, which clearly EKZNW still needs to invest in to successfully market UDP WHS.

5.3 Market Information Gathering

There is a fair amount of information collected by EKZNW on UDP WHS, however it is not marketing strategy information, and it is purely for financial benefit that this information is gathered. This information is the revenues that the camps make; the number of visitors to the Park gates; and accommodation occupancy rates. This is helpful in terms of reading what the visitor trends are to the Park and can help with future marketing direction for the UDP WHS. However EKZNW does not collect information which would help them to better prepare for the future as an organisation, especially on marketing related issues such as needs of consumers who have not yet visited the Park. There is a tendency to rely on other organisations such as KwaZulu-Natal Tourism Authority (KZNTA) for information on tourism and marketing issues. The information collected by KZNTA is of the whole province and usually addresses issues of the province therefore EKZNW still needs to be collecting their own information that will develop the organisation and enhance marketing in the UDP WHS.

EKZNW is not collecting information from the people that are mostly affected by the tourism community projects and this has raised concerns from communities and businesses about whether or not EKZNW wants to see communities benefit from tourism projects. Though EKZNW has interaction with communities, this is not marketing or tourism related.

“the communities are not benefiting from eco-cultural tourism yet” (Publicity association 1).

“There is conflict of interest between the conservation and tourism development” (Tourism business 2).

The International Cultural Tourism Charter states that tourism and conservation activities should benefit the host community and that these communities should be involved in planning for conservation and tourism (ICOSMOS, 1999). The Charter also states that the relationship between Heritage Places and Tourism is dynamic and may involve conflicting values, to avoid the conflicts this relationship should be managed in a sustainable way for present and future generations (ibid). EKZNW deals and partners a lot with communities in matters of biodiversity conservation; however the same can not be said for tourism. Based on interviews, the community tourism aspect is not being strategically engaged by EKZNW and therefore there is still a long

way to go before they are able to meet this challenge. A number of tourism community projects have failed in the UDP WHS area due to a variety of reasons including lack of project/service demands and insufficient entrepreneurial skills.

Quantitative data in the form of visitor statistics from EKZNW was collected and according to this information, visitor numbers to UDP WHS camps have dropped from 63% in 2003 to 58% in 2008. UDP WHS had 205 000 visitors in 2003 and this dropped to 192 000 in 2008 even though there was growth experienced in 2006 with numbers going up to 210 000 (Figure 5). There has been a steady drop in visitor numbers in the last three years. A number of reasons contribute to this decrease including competition, product packaging, economic crisis and consumers preferences. EKZNW also believe that the decrease was also directly related to the absence of the senior marketing manager. The revenue increased because the actual charge per person was increased by EKZNW. Conversely the number of actual visitors dropped. Competitors are able to offer more activities in the buffer zone attracting more visitors, e.g. offering quad biking. UDP WHS is unable to match or compete against these products as it goes against what they stand for, protecting the natural environment. Partnership is needed with the private sector without sacrificing what EKZNW as an agency stands for and seeks to protect.

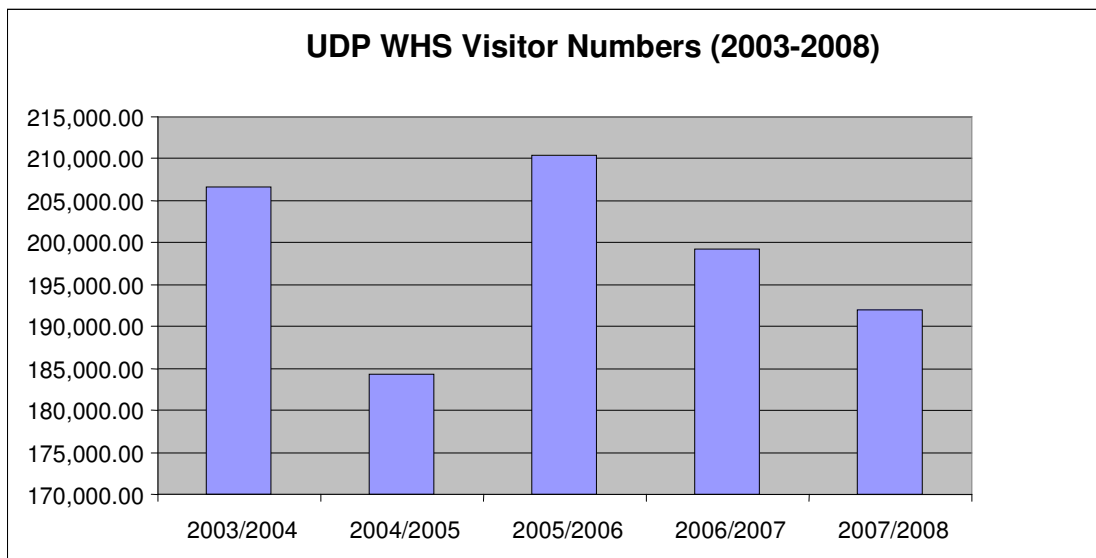


Figure 5: UDP WHS Visitor Numbers 2003-2008 (EKZNW, 2009)

Part of this study was to find leverage between visitor’s expectations and what is offered by the UDP WHS through marketing interventions. Though the visitor numbers have decreased (Figure 5), the total revenues received at the UDP WHS have increased from R14 million in 2003 to R21 million in 2008 (Figure 6). UDP WHS managed this advantage through increases levied upon the visitors though their numbers were relatively low. This also means that the domestic market is unable to afford holidays at the UDP WHS as a result of the increases and especially because of the current economic crisis. The international tourists have an advantage of stronger currencies and therefore are able to afford visiting sites such as the UDP WHS. Another possible main contributing factor to the decrease of visitor numbers is the fact that there were no marketing activities done during this time, as EKZNW did not have the senior marketing manager post filled for almost three years. The increase in revenues is assumed to have been from repeat business and the increased Park levies.

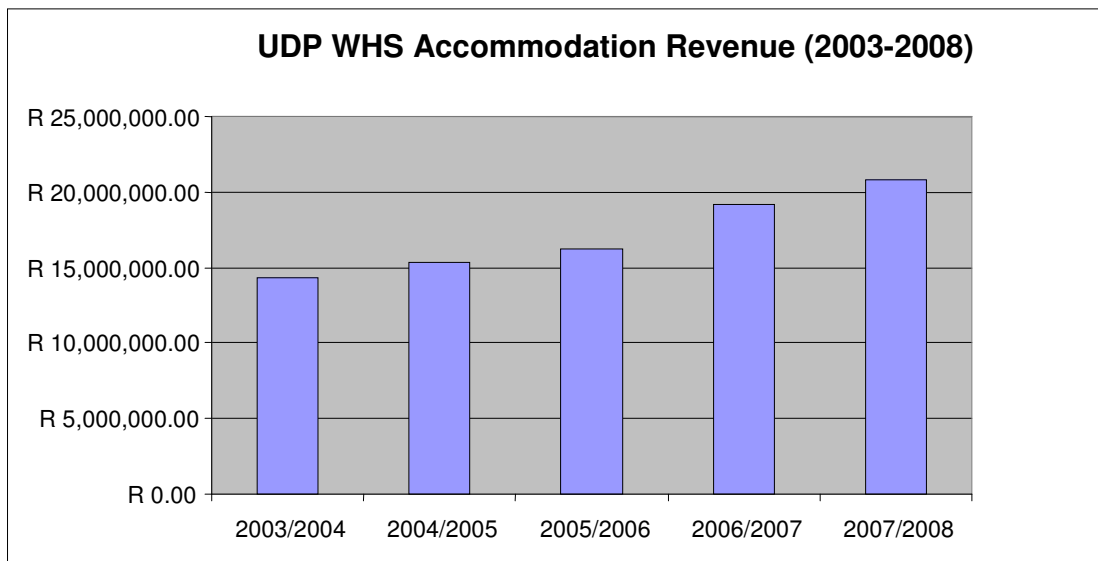


Figure 6: UDP WHS Accommodation Revenues 2003-2008 (EKZNW, 2009)

External challenges include the global economic downturn experienced especially by the domestic market.

“...the accommodation establishments are sitting empty, more of the reason for collaborative marketing efforts” (Publicity association 2).

However in some parts of the Drakensberg recession has not entirely affected business much. *“Instead of the regular guests staying for ten days as usual, they are staying for seven days but their spending patterns have not changed, they still spend the same amount of money as they would spend over a ten day period”*(Tourism business 1).

It is important to note also that some stakeholders feel that the recession has had a positive impact in stabilizing the market.

“Overpriced products are scaling down affording guests a longer stay and value for money” (Publicity association 1).

There are mixed feelings as to the effects of the current global economic downturn amongst stakeholders with some businesses still doing well in profits and others feeling the economic strain. It is important for EKZNW to collect information on such external issues as they will affect the tourism potential of the UDP WHS. If customers do not have disposable income, they will not visit UDP WHS and EKZNW. Being aware of these facts and collecting the information, EKZNW can make other plans to get tourists to visit UDP WHS at more affordable rates considering the economic crisis.

In terms of customer needs there is regular request about the historical background of the Royal National Park and its association with the English Royal Family. EKZNW staff feel that the organisation needs to capitalise on this as it means that more guests are attracted by this aspect of heritage as well, more information can be collected on this so that EKZNW is certain of this demand and plans to meet it.

In analysing competition it is evident that the strength of other businesses in the UDP WHS area is that they are part of a chain network.

“...our national marketing is done by our national office, we only have to worry about marketing here in KwaZulu-Natal, we are well known in the country” (tourism business 3).

This means that they have more support; they have access to wider and new target markets; they can expand their product; they have an increased ability to serve customer needs; they have

increased marketing budget and are able to share costs, their image is enhanced; they have access to their partners' databases and access to their partners' expertise (Morrison, 2002). Some of the UDP WHS competitors have been identified by the respondents as the Kruger National Park and Cape Town. These destinations are amongst some of the major destinations in South Africa because of how they are being marketed and positioned. The UDP WHS is not being marketed as such but it does have the same marketing potential. Saayman (2006) suggests that any destination such as the UDP WHS needs to analyse its structure and the dynamics of the industry. This has not been the case though with EKZNW for the UDP WHS. The seven dimensions that Saayman (2006) and du Plessis *et. al.*(2005) affirm must be studied, have not been a priority to EKZNW for the UDP WHS. These dimensions are: actual and potential market size; market growth; market profitability; cost structures; distribution systems; trends and developments; and key success factors (ibid).

Concerns from both stakeholders and EKZNW staff that EKZNW has given up on marketing and do not even trust themselves in marketing need to be addressed. EKZNW staff sometimes view themselves and their marketing as insignificant in keeping up and abreast with competition, and as such visitors prefer to stay in other private establishments instead of EKZNW camps.

“the organisation had no marketing department for two and a half years until the recent appointment of the senior marketing manager in 2009”(Marketing manager 2).

This is one of the issues that cause inconsistency in marketing of the UDP WHS and EKZNW as a whole. Recording of any marketing information during this gap period might not have been possible. EKZNW needs to assess the tourism revenues during this period to assess the effects on marketing of the UDP WHS. It is not clear why the visitor numbers decreased, the assumption based on interviews is lack of marketing. The drop in visitor numbers in Figure 5 has been fuelled by the fact that there was no one in charge of marketing during this time. The marketing manager is important in playing a role to increase visitor numbers and revenue.

EKZNW has not sought information on the proper marketing of a WHS, specifically success cases and not so successful cases. Information about competition, trends, customer behaviour and needs has not been collected on ongoing bases. Information collected by the KZNTA can be used by EKZNW to better understand the needs of consumers that come to the province however

EKZNW must still ensure that they keep their own records of such information pertaining to the UDP WHS. Environmental scanning should be carried out and factors that might have an influence on the organisation and on UDP WHS such as the political, economical, socio-cultural and technological aspects. These factors are usually the outside forces that will affect the organisation and how it may market itself (Jooste *et al.*, 2009).

A SWOT analysis (Appendix B) was conducted based on interviews. SWOT serves as a catalyst to facilitate and guide the formulation of marketing strategies (Jooste *et al.*, 2009). Information that is organised in a SWOT analysis may assist marketing management to identify the difference between where it thinks EKZNW is in terms of UDP WHS, where others like stakeholders and customers see it as being, and where it expects to be. To address SWOT analysis issues properly, marketing management should determine its total impact on the organisation's marketing efforts for the UDP WHS. This assessment gives management an idea of the basic strategic options that might be available to emphasise EKZNW's capabilities or minimise its weaknesses and convert threats.

5.4 Segmentation, Targeting, Positioning

This section discusses the findings in terms of the definition of current segments and untapped desired segments.

5.4.1 Definition of Current Segments

The UDP WHS hospitality managers strongly feel that this Park has the domestic market which likes to camp while the international market uses caravans and chalets. Pensioners and day visitors form part of the market. Some EKZNW's camps boast a tranquil environment for a more mature market with domestic and international demand. Hiking is the most common activity and a major draw card. Most international visitors come mainly from Germany and Australia. The local market is mainly from Johannesburg and Pretoria.

EKZNW feel that the local market for government functions is currently not viable possibly due to political structural changes to the new government and the current global recession. It is

important that EKZNW invest in markets that have been and will be consistent even in the future.

“We also hold government functions however this market is not doing well at the moment” (Hospitality Manager 3).

“The general local market is activities based and is a good market for UDP WHS to tap into in terms of ecotourism”(Tourism business 2).

“Parents can not take their kids for long walks and lengthy hiking trails so activities must be based on the camp or resort” (Tourism business 1).

Currently it is not clear who the target markets for UDP WHS are, how they are profiled and how these records are kept if they are kept by EKZNW. The segments that are more relevant to the World Heritage Site which EKZNW could target for UDP WHS based on the ideal marketing strategy are: domestic long holidays, domestic short holidays (including weekenders), activity and special interest groups, educational groups and business tourism groups. In a high-profile protected area such as UDP WHS, an important source of tourism income is retired Western tourists, who are on a package of ‘must see’ places in company of friends.

The target market that the respondents have identified for UDP WHS has not been profiled properly. The market identified is general and not specific and according to what EKZNW can fully deliver. Bennett *et.al.*, (2005) recommend sound marketing as starting with the identification of consumers and ending with a delivery of need-satisfying service. It seems that there is a range of markets visiting UDP WHS but these have not been properly segmented and profiled such that EKZNW capitalises on each of these market segments.

There is growth in the black local market (Black diamond market). This market is said not to be interested in cultural activities. Cultural activities in the case of UDP WHS are Rock Art related, which is one of the reasons why the Park was proclaimed a World Heritage Site in the first place. The majority of tourists visiting cultural sites in UDP WHS are from international countries and the white domestic market. EKZNW has seen the need to explore the domestic Black diamond market to increase visitor numbers to its parks and to encourage love and understanding for nature preservation. EKZNW has had live broadcasts by Ukhozi FM at some camps to

encourage the Black diamond market to visit EKZNW parks. EKZNW believe that majority of the Black diamond market are not generally interested in cultural activities, therefore aggressive marketing directed at this market is needed and being sought by EKZNW.

George (2008) argues the possible reason that this market may not travel is due to the '3 Cs': Culture – leisure travelling has not been part of the African culture; Cash – the majority of consumers in this market do not have the money to travel; and Connections – members of this market tend to have strong family connections and are more motivated to visit relatives, often in distant rural areas, than to seek tourist offerings. Based on the interviews, this market is the largest in the domestic market and needs to be explored to its full potential and EKZNW is showing this initiation.

5.4.2 Untapped Desired Segments

Considering the chosen segments (desired and untapped) EKZNW has to assess if the segment is viable, sustainable, accessible and measurable for the UDP WHS (George, 2008). This can only be done through thorough marketing research and the result of such research will help with effective marketing. If market segments are done properly, it will help to ensure that EKZNW gets the highest return for their marketing expenditures in UDP WHS. School groups with the focus in environmental education and the Black diamond domestic market are some of the growth points for the UDP WHS which will help increase the market share and the revenues. EKZNW has not fully exploited these segments.

In raising awareness in the domestic market, The Tourism Company (2003) suggest that the World Heritage Site should ensure effective and accurate coverage of the Park in all destination guides; it should promote eco-cultural packages and events; and generate more awareness and linkages to website.

As much as EKZNW has recognised the importance of investing in the local Black diamond market, it is not based on eco-cultural tourism. It is based on other activities such as having concerts and parties as it is believed that the Black diamond market is not interested in activities such as hiking which is what the Park has on offer. The way of tapping into this market needs

more thorough research than currently being done to ensure growth and its sustainability and this should be Park based and specific for the UDP WHS.

Emerging and community based markets e.g staying with local families, is one UDP WHS can also tap into especially for the communities and community projects. At this stage, the Park management's focus is benefits through conservation and not tourism.

“we have hosted tourists into our houses with good families and they love it, we can do it more often if [only] given a chance, we make sure they [tourists] are safe”(Cultural community project 1).

These tourists seek better, deeper and more meaningful experiences of the places they visit and are usually concerned with humanitarian issues (George, 2004). These tourists want to experience new and different cultures and ways of life. They look for environmentally friendly tourism offerings and more authentic destinations, therefore are an ideal market for the UDP WHS. In light of the strategic objectives, the aim is to focus on the most important segments in terms of scale/value and ease of reaching that chosen market (The Tourism Company, 2003).

5.5 Marketing and Destination Mix

The section discusses the findings in terms of marketing mix for the UDP WHS and destination mix. Marketing mix discusses the product, place, price, promotion, people, partnership, packaging and programming.

5.5.1 Marketing Mix

5.5.1.1 Product

The UDP WHS offers hospitality service and ecotourism experience. Different camps and businesses define their product in many different ways based on their target markets. Some include rock art, conferences, weddings, walks, and hikes as their products.

“the main message from our resorts to school groups is grasslands, geography, rock formation and historical and cultural background of the UDP WHS”(Tourism business 1).

“...the amphitheatre, Mont aux sources mountain, view of the mountains, close proximity to the Royal Natal National Park where the Queen of England once stayed, the Tugela ferry, rock art, and the heritage as a whole are some of the draw cards we use to promote our resort and get people to visit” (Tourism business 2).

Spa, horse riding, bird viewing, kids’ activities, trout dams, and hiking are also on offer by the private hotels. The tourism businesses know their customers very well. They say their customers come for peace and tranquillity, for adventure tourism and activities including sleeping in caves, hiking, and bird watching.

“There is wealth of the environment and ecotourism in the UDP WHS area, beautiful views, the perfect location, repeat customers and hikers interested at the Rock art” (Tourism business1) .

“The beautiful views, scenery, caves, overnight hikes, trout fishing, cultural tours and the history of Amahlubi are among what attracts people to the UDP WHS”(Tourism business 2).

“The visitors want and enjoy safe cultural experience” (Tourism business 3).

Another biggest attraction especially for locals is the snow mainly in July. The UDP WHS has good product mix including accommodation, service provision by employees, cultural interpretive centres and natural features and landscape. However the perceived benefits provided to meet the needs and wants of tourists, equality of service received and the value for money delivered must be assessed against the competition of the UDP WHS. EKZ_{NW} is not using these features to their benefit as the private tourism businesses are doing and need to do so effectively.

5.5.1.2 Place

The distribution strategies needed in UDP WHS involve tour operators, travel agencies and the internet/world wide web. There is more need therefore to emphasise relationship marketing as a tool for distribution strategies in UDP WHS by EKZ_{NW}. The UDP WHS visitors book directly with EKZ_{NW} via telephone or e-mail. The tour operators seem to work mostly with the private businesses and only with EKZ_{NW} when they discuss group entry fees to the Park. EKZ_{NW} has

an opportunity of making channels of distribution both direct and indirect to capitalise on the tourist spend. Marketing initiatives should complement the UDP WHS's unique features.

5.5.1.3 Price

Since price is determined by what the consumers are willing to pay and by competitor's prices, it plays a crucial role in the marketing strategy by allowing the positioning of an offering to a target market to gain competitive advantage (George, 2008). EKZNW does not have a pricing strategy in place for UDP WHS.

“A 2 tier pricing structure in camps and hotels/accommodation establishments will work if the disparity is not too much” (Publicity association 1).

The stakeholders within the area offer value for money in a sense that their prices are inclusive of all activities, giving real value for money to their target markets. They conduct research and know what their market share is for each of their target segments. Based on interviews with businesses, the majority but certainly not all of stakeholders enjoy a high occupancy rate of 80% and they believe this is due to their marketing strategies and efforts.

The local market always complains about the price being too high. Therefore there is a need to create awareness and educate the locals to understand the pricing structures for the protected area and its impact on the environment. The service levels must be complimented by the prices being charged.

“ We want our visitors to have an unforgettable positive experience in UDP WHS, we want to be seen as involved and engaging with the communities” (Hospitality manager 6).

EKZNW should recognise that each visitor to the UDP WHS has a different need and want, this would ensure effective value proposition. ICOSMOS (1999) states that conservation and tourism planning for Heritage Places should ensure that the Visitor Experience will be worthwhile, satisfying and enjoyable. The customer's needs change and value propositions therefore must be updated to meet the changing needs of customers. This again can only be done through thorough marketing. It is imperative that EKZNW understand that UDP WHS's

competition is trying to develop and communicate their value proposition as well. In order for The UDP WHS to be successful the value proposition must be differentiated and superior to all others. This can be done within the constraints of collaboration. EKZNW must make sure that UDP WHS delivers real value in terms of its eco-cultural products.

5.5.1.4 Promotion

Promotion involves all communication between an organisation and its consumers. Without this as part of the strategy, it would be difficult for EKZNW to effectively market UDP WHS. EKZNW currently uses radio, internet marketing, and printed literature such as brochures to market the organisation's products. They have an organisational website which has information about the whole organisation's products including the UDP WHS. UDP WHS can effectively be promoted through database marketing, direct marketing, public relations and internet.

5.5.1.5 People

People such as employees, communities, investors, domestic and international tourists, businesses and universities all play a crucial role in sustaining the UDP WHS. The interdependency of all these UDP WHS stakeholders has not taken priority for EKZNW. The organisation has some relations with a few stakeholders and no relations with other. This has led to most businesses forming alliances only with each other as they feel EKZNW is not interested in forming good relations with them.

“Relations we have with other establishments are sound, as their services complement our products and services. For example an establishment would bring tourist for lunch, and the Park would be useful for our guests in hiking” (Tourism business 2).

Information centres market the hotels and EKZNW's camps. Other hotels have standing agreements with each other for spillovers. The hotels, communities, and adventure companies compliment their products with the UDP WHSs products to attract guests. The product owners recommend activities to their visitors, there is good information sharing within stakeholders and especially the tourist information centre.

Other stakeholders are very critical of involving their establishments with organisations like the EKZNW.

“Communication with other stakeholders is too tiring and no one wants to drive the ‘bus’ (strategy)” (Tourism business 3).

“EKZNW must share the UDP WHS with all stakeholders otherwise they are excluding themselves from business in the area. The relationship with EKZNW needs to be reviewed. It is understood that the level of compromise will always be a battle” (Tourism business 2).

Relations are not so good maybe because every business focuses on its own marketing. Relations with some players interviewed are not healthy therefore they need to be built, and expectations from each player communicated. On the other hand, EKZNW has experienced challenges and have battled to get local communities to commit to projects and manage them. There are projects that EKZNW still manage because the local communities do not want the responsibility and the risk associated with owning a business and thus they are happy to work for someone and want to be supervised rather than use their own initiative.

“It is a challenge to influence community relations with EKZNW’s camps” (Hospitality manager 3).

“There is contention within the communities and this makes it difficult for us to work with them” (Hospitality manager 7).

UDP WHS has experienced some negative publicity through infighting within the communities especially in camps that belong and are managed by communities. This sort of conflict deters visitors from the area and the communities themselves end up not wanting the risks associated with managing a campsite. Communities have been encouraged to be part of the tourism industry in the UDP WHS and they participate by becoming tourists guides, selling craft, and offering village tours. However these only benefit individuals and not the entire community as a community tourism project would.

5.5.1.6 Partnership

A number of stakeholders expressed their disappointment with EKZNW and do wish that they can be in some form of partnership. In this day and age organisations should really ‘partner or perish’. This is the new thinking, instead of always seeing each other as competition, businesses are becoming more and more aware that strategic alliances are the way to go and ensure that the businesses survives in these tough competition times.

“EKZNW is not well organised, it lacks vision, skills and direction, so partnerships with them are time consuming with no results” (Tourism business 3).

“A simple informational newsletter involving all stakeholders would be a start of good partnerships. This can constitute information like road closures so that the visitors to other resorts would not be disappointed and the owners supply them with correct information before they venture out into the Park”(Tourism business 1).

Stakeholders suggested that a monthly or weekly local newspaper comprising of only good news (UDP WHS) would be appreciated. The stakeholders feel it is difficult to collaborate with other businesses as they see each other as competition; however other stakeholders speak highly of some businesses especially those making a difference in communities through their social upliftment programs.

All the EKZNW’s stakeholders within the UDP WHS should know what to expect from EKZNW as a number of them have unrealistic expectations about the organization and this results to conflict. This can be solved by simple communication channels. Community projects have varied expectations from EKZNW, like funding and training. These community projects are failing due to lack of entrepreneurship and leadership from the community side, lack of infrastructure and communication links as well as no proper marketing efforts. For most community projects the objective of their development is the upliftment of the community, the creation of jobs that would change the local people’s lives for the better. This however is faced with a lot of challenges including no relationships with other businesses in the area.

“there is no trust among stakeholders as they view each other as competition”(Cultural community project 1).

Community leaders have resorted to thinking that the unwillingness of local businesses to cooperate with them is also fuelled by racial differences. They feel they get no help from EKZNW either. These communities need training in nature conservation and sponsorship for the donga rehabilitation and tourism projects. It is apparent that the role of EKZNW is not understood as these communities expect a variety of funds from EKZNW.

5.5.1.7 Packaging and Programming

EKZNW has not yet made efforts to concentrate on this aspect of their service and this hinders the overall appearance and appeal of the UDP WHS. The ecotourism package and programming for example includes activities for the visitors while they are at the destination. These activities are drawing enthusiasm that gives service an added dimension and appeal. EKZNW can tap into this as soon as the relationship marketing has been sorted out including having partnerships with other tourism businesses in UDP WHS who actually complement their services and products. Eco-cultural events programs need to be strengthened. EKZNW can encourage and develop more eco-cultural tourism packages.

5.5.2 Destination Mix

Destination marketing according to Seaton & Bennett (1996) involves planned cooperation, coordination and linkages between tourism organisations in a region. This has not been the case with EKZNW for UDP WHS and this is a great concern. The success in destination marketing is especially influenced by its natural resources, climate and culture (Lumsdon, 1997). The UDP WHS is capable of this success. UDP WHS is easily accessible, however within the Park itself it might be difficult to access other camps because of bad road infrastructure, and some parts of UDP WHS are not accessible. The attractions are the natural landscape such as mountains and water catchment areas; built attractions such as camping, lodges, and hotels, and cultural attractions such as rock art paintings. The amenities are limited due to the nature of the UDP WHS product but there are adventure activities, mountain views, and good dining options. EKZNW should create an environment that is friendly for all stakeholders of the UDP WHS. Customers need to feel a sense of being appreciated and belonging in order to create an

unforgettable experience. This plays a huge role in ensuring that the customers are loyal to the UDP WHS.

5.6 Branding

Branding is usually viewed as a subcomponent of the product and is recognised as a critical component of building long-term relationship with consumers due to its nature (Jooste et al, 2009). As such most of marketing activities performed by any organisation or destination are related to the brand.

There were mixed feelings between the EKZNW staff itself and the rest of the UDP WHS stakeholders in terms of branding the Site.

“the authority governing WHSs does not allow WHS brands to be used by non-conservation organisations as a result the unified brand for UDP WHS would not work” (Senior manager).

A World Heritage Site logo must be used in conjunction with the UNESCO emblem to communicate the official nature of the designation and to serve a visual link with other domestic and international World Heritage Sites (UNESCO, 2002). Some EKZNW managers feel that unified branding would work for the UDP WHS area and foster better relationships with all stakeholders. They expressed that marketing has always been an after thought within their organisation, that the staff is spread too thin, does too much and therefore can't be effective in marketing. Branding a destination such as the UDP WHS can be difficult because it consists of a number of products and services that are consumed over a period of time, and have a lifetime experience captured in one's memory (Saayman, 2001). The brand usually captures an everlasting experience and if it is not properly thought and integrated into the marketing strategy it can result in customers not visiting the destination (ibid).

“We are spread too thin and it is not possible for us to focus our marketing efforts on only one Park, we do marketing for the whole organisation” (Marketing manager 2).

Saayman (2001) suggest that staff be the brand builders. However this would be more effective if done in partnership with the stakeholders in the UDP WHS area. Branding is made more difficult because the Park management also have the law enforcement duty and hence carry that

brand whether they like it or not. EKZNW seem to lack resources and the stakeholders are willing to help as long as they are all working towards the same goal – responsibly marketing the UDP WHS. There is a belief among all stakeholders interviewed that unified branding would help a lot in developing the market share for the UDP WHS.

There is a strong need to educate and create awareness on the importance of the World Heritage Sites especially to the new emerging markets such as the domestic Black diamond market, and a unified brand will assist in that. The brand name and image become part of the total product and as such it is vital that the needs, behaviour and attitudes of consumers are understood (Saayman, 2001).

The private businesses, municipalities and communities feel positive about branding the UDP WHS. The hotels in the area have between 45 % and 88% occupancy rate and as such feel that they would benefit from collaborative marketing efforts and from general branding of the UDP WHS as this will benefit all stakeholders and cause good relationship marketing in the area.

“A general or unified brand will work if driven properly. UDP WHS is a good product that needs to be utilised and the local market should be the backbone of this tourism industry” (Municipality 2).

This statement raised concerns on the part of EKZNW whether they would be able to drive such a marketing strategy. The N3TC (N3 Toll Concession) Drakensberg Route is an example of collaboration and one of the positive developments in the UDP WHS area consisting of 130 establishments working towards a common goal. The N3TC is made up of a number of tourism businesses in the Drakensberg area, they also seek to extend this route and increase the market share. This proves that branding would be ideal for the UDP WHS.

The private businesses hope that they would benefit from a common brand of the UDP WHS. *“We will only buy into the eco-cultural tourism marketing strategy provided it is planned through using a holistic approach, the EKZNW has a good board, CEO has a sound mind, if there is political backup and good marketing backup” (Tourism business 3).*

The Tourism Company (2004) suggest that there should be one clear brand name for the Site, associated with its reason for designation and its special quality, which is also carefully applied to products associated with the Site that support the objectives of the management plan. This is because it is the actual Site itself which is the attraction and around which the marketing should be based. The World Heritage Site brand can be used by both the public and private sectors, and as such there needs to be clear usage guidelines to define in which situations the World Heritage brand can be applied and in which situations it cannot (The Tourism Company, 2004).

“Marketing a destination brand takes years. EKZNW needs a sales person who will travel to build the brand and only a passionate person will market this destination, therefore the right person needs to be employed and they must go for regular sales workshops” (Publicity association 3).

“It is difficult to start a new brand so patience is required if UDP WHS is to be branded as a destination” (tourism business 2).

It is interesting to observe that there is great support for the collaborative marketing efforts and branding for the UDP WHS. It is also evident that the stakeholders are really eager to collaborate and are extremely supportive of a unified brand for the UDP WHS. They show vast experience in marketing and branding and have been down this road before. EKZNW is not so eager to have a unified brand and claim that it is not possible; there was a feeling that EKZNW staff may be afraid that the stakeholders will be able to run with the brand better than EKZNW exposing their lack of marketing skills. This however should not be the case as the aim would be for both the public and the private sector to collaboratively promote the brand.

EKZNW should instead use the stakeholder’s resources and expertise in marketing; it will take them further than they could have imagined their marketing expectations. Strengthening brand identity and increasing Park awareness should be one of the top goals in branding a protected area (Bushell and Eagles, 2007). A holistic approach has to be followed and the total experience needs to be captured in the branding process (Saayman, 2001).

5.7 Destination and Collaborative Marketing

This theme discusses collaborative marketing efforts that EKZNW has with various stakeholders in the UDP WHS. It is closely linked to the branding theme. The Tourism Company (2003) express the complex layers of responsibilities that are shared amongst a range of partner organisations. Many of the respondents share this view.

“The interdependency of tourism products pushes that there be collaboration in marketing in order for the destination to prosper” (Municipality 1).

“The truth is, marketing when properly done is expensive” (Tourism business 3).

“Sustainability is only achievable and possible if the balance between the environment, economy and social aspects is achieved” (Publicity association 2).

“If there was a collaborative pool of resources, all stakeholders would benefit” (Hospitality manager 8).

This means that there is a great need for collaborative marketing for UDP WHS. At the core of any marketing strategy is alliance building and branding, and as such partnering with private sector companies and non-government organisations increases promotional opportunities for Parks (Bushell & Eagles, 2007). A brand helps with collective identity and this in turn helps with collective learning. World Heritage Icon Value (2002) stresses the provision of a marketing strategy that is flexible and usable for all interested parties.

“To encourage cooperation we should start an Open Day for all role players in the area” (Senior manager).

This would help build relations and is one way of finding collaborative marketing strategies for the UDP WHS. Wang & Xiang (2007) and Fyall & Garrod (2004) agree that destination marketing has to be done involving all stakeholders; otherwise it will not succeed in the long run. EKZNW needs to embrace this idea of collaboration to gain competitive advantage.

“...central marketing effort like a common brand for the UDP WHS, would help attract a lot of people to the area and more products will benefit and service levels will improve” (Hospitality manager 6).

Moutinho (2000:121) articulate that ‘marketing is a responsibility of the entire organisation’. EKZNW managers are keen to be involved in marketing efforts for UDP WHS and are of the view that an Eco-cultural tourism marketing strategy will foster progress and encourage continuity in spite of high staff turnover. Customer satisfaction would go a long way in growing the market.

5.8 Summary

This chapter discussed the data interpretation with reference to the literature review in Chapter 2 of this thesis. As much as there is currently no marketing strategy for the UDP WHS, the marketing activities are being done on *ad hoc* bases for all EKZNW Parks. These activities are performed by a three staff marketing department which looks after the whole organisation making it very difficult to give attention to the UDP WHS. EKZNW does not have good relationships with its stakeholders and this makes it hard to forge collaborative marketing efforts which would make the marketing of the UDP WHS easier as tourism businesses have more marketing resources and expertise. The UDP WHS SWOT analysis compiled through the interviews can be used to put the Park at a competitive advantage, if used properly. Identification of current and potential customer segments is needed to profile and better market UDP WHS to these markets. Branding is also an area needing more attention in order for an easier marketing of the UDP WHS to its current and potential markets.

Chapter 6 will conclude the study and make necessary recommendations on how the gaps identified can be bridged for future development of EKZNW’s eco-cultural marketing strategy for the UDP WHS. It will also suggest any further research that might be necessary after this study.

CHAPTER 6

CONCLUSIONS AND RECOMMENDATIONS

6.1 Introduction

The overall objective of this study was to evaluate the current eco-cultural tourism marketing strategy for the UDP WHS. The study sought to determine the marketing gap between EKZNW's actual eco-cultural tourism marketing strategy and the ideal generic marketing strategy developed from literature. The four specific objectives were:

1. to determine the ideal generic marketing strategy for a Protected Area specifically a World Heritage Site;
2. to establish the current status of EKZNW's marketing strategy for the UDP WHS;
3. to conduct a comparative analysis between the ideal strategy and EKZNW's actual strategy for UDP WHS; and
4. based on the comparative analysis, recommend marketing interventions to bridge the gaps and improve the eco-cultural tourism marketing strategy for UDP WHS.

This chapter will draw conclusions and suggest recommendations on marketing gaps identified. Conclusions and recommendations are drawn and made focusing on the six key elements of the marketing strategy, which the study has used as the themes throughout the research. When building a house, one needs to spend sufficient time laying a strong foundation. The same applies to this study and marketing in general, without proper analysis and understanding of all key aspects; the strategy is bound to fail. These aspects are: marketing goals, issues and expectations; market information gathering; segmentation, targeting and positioning; marketing and destination mix; branding; and destination and collaborative marketing. The conclusions and recommendations will also suggest future research and also how the research method could have been improved.

6.2 Conclusions

6.2.1 Marketing expectations, issues, and goals

It is pivotal to stress that some of the ideal marketing expectations, issues and goals cannot be compared to EKZNW's UDP WHS because there is currently no marketing plan where EKZNW can engage with such topics. EKZNW has one goal for the UDP WHS and that is to have an eco-cultural marketing strategy for the UDP WHS. This goal was identified during the 2004 stakeholder participation process of UDP WHS IMP development phase. Nothing has happened to realise this goal and the reason by EKZNW staff is the lack of funds. The goal is based on one of the objectives which were formulated in consultation with the stakeholders and was ranked as first priority. This means there were good marketing intentions even though the marketing strategy has not yet been developed. It is important to note that the EKZNW marketing department itself was not involved in the IMP formulation and this makes it difficult for them to make their marketing goal a reality. No one represented the EKZNW marketing department during this process. The IMP process participants did not even know about this goal. There was no and still has not been internal or interdepartmental communication on the marketing expectations, issues and goals. Only the Park management were involved in this process as at the time it seemed and made sense for them to take charge of how the Park should be managed.

Unless there are SMART objectives for the UDP WHS, the Park will remain at its current marketing state that is not being fully exploited and well marketed. A plan is needed that will help EKZNW weave some of the goals in the Ideal into the Actual. Marketing activities are presently done on an *ad hoc* basis; the focus is on EKZNW parks as a whole and not the UDP WHS specifically. There is a need to have consistent and measurable marketing objectives that are focused on UDP WHS marketing expectations. The development and implementation of actions to attain such goals would have to involve the Park managers, hospitality managers and the senior marketing manager. At the time the study was done there was no constant contact between the Park and the EKZNW's marketing department. As presently conceptualised and executed, the roles between hospitality and conservation are not complementary, leading to conflict in some cases, especially since marketing is not a specialisation field for the Park managers. More dialogue between marketing and Park managers is needed. This will avoid

conflicts, leading to more manageable and sustainable relationships between hospitality and conservation sectors.

6.2.2 Market information gathering

There is no system for gathering external information by EKZNW for the UDP WHS, thus there is no environmental scanning being carried out. Amongst other things, information gathering should at least concentrate on aspects such as competition, image of organisation to consumers and competitors, consumer trends and buying behaviour within the industry. There has to be a systematic way of collecting such information so that it is used for marketing intelligence and thus benefits the Park. EKZNW collects information on revenues, occupancy rates and the number of visitors to the UDP WHS. Information on the tourism industry, UDP WHS's competition and customer needs and expectations is not being collected. EKZNW does not yet have a unique usable brand for the UDP WHS as an ecotourism destination. For the Park this means that it is not being marketed uniquely as an ecotourism destination. The SWOT analysis tool has not been explored in the UDP WHS; this would have helped UDP WHS to exploit its competitive advantages. UDP WHS has differentiation competitive advantage. An advantage over competitors is gained by offering consumers greater value, either by means of lower prices or by providing greater benefits and service that justify higher prices. Nationally the UDP WHSs product in relation to other WHSs is unique in a sense that they offer a combination of ecological and cultural benefits to the visitors, for example the rock art. Visitor statistics indicate a drop from 63% (205 000) in 2003 to 58% (192 000) in 2008. In spite of this decrease there was a total increase of R7 million in revenues over the same period, from R14 million to R21 million. This increase in revenue was due to EKZNW charging more for Park entries even though the visitor numbers were lower over the same period.

6.2.3 Segmentation, Targeting, Positioning

EKZNW is not conducting effective market segmentation. Current messages and marketing efforts are directed to all and any market. The findings reveal that it is unclear who the actual target market for the UDP WHS is, how they are profiled and how the records of the markets are kept. There are a different number of potential (untapped) markets which EKZNW can target for

the UDP WHS which are interested in culture and ecotourism, for example education/school groups. The Black diamond market is another possible growth point for the UDP WHS that has not been fully exploited. EKZNW has realised this market's importance and is trying to tap into it in regards to the other parks that the organisation manages. The Black diamond market is a proper marketing term given to the emerging and emerged black middle and upper class of South Africa. Focus is needed on the most important segments in terms of value and ease of reach. Without proper segmentation criteria, it will be almost impossible for EKZNW to target the right markets and position themselves positively in these markets.

6.2.4 Marketing and destination mix

Marketing mix and a destination mix are two different components as explained in 2.4.4, therefore they deserve separate attention as far as strategy is concerned. The UDP WHS has a good marketing and a good destination mix in place, though EKZNW has not cohesively planned this mix. EKZNW has a good eco-cultural product in UDP WHS that just needs to be marketed well. Therefore there is an opportunity to excel in marketing the UDP WHS. The tourism stakeholders benefit and use this marketing mix and the destination mix to best grow and advance their businesses. There is no pricing and promotion strategy and this adds to the conflict between EKZNW's customers, stakeholders and staff. Locals complain about high prices and other camps charge per unit whilst others charge per person. Promotion strategy is important because it engages stakeholders, the public, key market segments and staff in the heritage site and the conservation of the area.

There has also been some negative publicity through infighting within the aMangwane community adjacent to the Park in Northern Drakensberg. These faction fights usually happen in camps that belong to and are managed by these communities. This sort of conflict deters visitors from the area as the roads leading to the camps have been closed to visitors in the past and their safety in such cases cannot be guaranteed.

6.2.5 Branding

Currently there is no collaboration between other stakeholders and EKZNW in branding for the UDP WHS and as such there is no common ground for relationship building between stakeholders and EKZNW. This causes duplication in marketing efforts and is to a certain extent a waste of resources. There is great support from stakeholders for collaborative marketing efforts and branding for the UDP WHS. However there is not yet anyone amongst stakeholders and EKZNW who want to lead this concept and bring it to reality. The results showed that stakeholders feel positive about branding the UDP WHS as an eco-cultural destination however some of the EKZNW staff especially Park managers are hesitant about this and have their reservations. They feel that branding the UDP WHS is not something that should involve stakeholders since they [EKZNW staff] have the mandate to manage the Park.

6.2.6 Destination and Collaborative Marketing

EKZNW has not yet embarked on destination and collaborative marketing. The UDP WHS is a major eco-cultural destination in South Africa but EKZNW has not concentrated their efforts on marketing the Site as such. The marketing of UDP WHS has been done largely by and through the publicity associations (tourist centres) and the private sector (tourism businesses). The publicity associations market the whole area or destination within its jurisdiction, these include individual businesses. The tourism businesses market the UDP WHS because their businesses are based there. It is not wise for EKZNW to just leave the marketing of such a destination to businesses and publicity houses, alone. EKZNW needs to interact with all the stakeholders promoting the UDP WHS for better collaboration and unified marketing efforts and they need to ensure that they are at the centre of this marketing drive.

6.3 Recommendations

6.3.1 Marketing expectations, issues, and goals

Based on the interviews conducted during this study, EKZNW is experiencing challenges related to high marketing staff turnover, *ad hoc* marketing activities, internal communication issues and scarce resource allocation and these can all be changed into more desirable situations through

proper management techniques. Effective recruitment criteria in marketing will ensure that the right people who are passionate about marketing get the job. Planned marketing activities and action plans are crucial and UDP WHS need to have its own marketing manager who will lead the marketing strategy and ensure that the Park receives the attention it deserves as a WHS. Full UDP WHS familiarisation trips and orientation of reservation and marketing staff is needed on a continuous base. Financial resources can be better managed through pooling of marketing activities with stakeholders. The product or service promotion, pricing, place and distribution strategies, internal marketing, positioning, alliance building and branding are the key to a successful eco-cultural tourism marketing strategy. This is why this research used these elements as key themes throughout the study because they are vital to a marketing strategy.

EKZNW should consider having realistic strategic marketing objectives that are focused on UDP WHS and these should be in writing. Internal and relationship marketing need to be attended to as a matter of urgency in trying to resolve some of the marketing challenges faced by EKZNW, such as conservation staff making marketing decisions. Having a good internal marketing program EKZNW can build the organisation's image and reduce interdepartmental conflict that seem to exist and develop staff commitment and cooperation needed to make external marketing activities work.

There is a need to actively involve Hospitality Managers in marketing. The marketing personnel should visit their sites to know and understand their products this will also help combine and share marketing ideas with Hospitality Managers that will take the Park further into a successful well marketed eco-cultural destination. Internal capacity should be reviewed to successfully develop and implement a strategy. A strong link with the tourism industry as well as integrated marketing is needed and this should embed other forms of promotion to ensure the correct reach of the target markets.

6.3.2 Market knowledge gathering

EKZNW would benefit from investing in an information management system which captures visitor trends to the Park, this information can be used to better market the Park in the future and to ensure that visitor expectation of the Park are properly met. EKZNW needs to employ an

appropriate marketing candidate for UDP WHS who will be able to gather a wide range of information about cultural heritage products in order to understand the cultural and heritage tourism demand and use this information to effectively market the Park. EKZNW should invest resources towards marketing research for the UDP WHS in order to be able to better predict the marketing direction they must take in the future which would be of benefit to EKZNW in terms of profits while satisfying the customers' needs. They should study the actual and potential market size, market growth, market profitability, cost structures, distribution systems, industry trends and developments. Partnership is needed with the private sector without sacrificing what EKZNW as an agency stand for and seeks to protect.

6.3.3 Segmentation, Targeting, Positioning

EKZNW should ensure the use of market segmentation to identify and profile segments with varying degrees of buying potential. It is crucial to understand consumer psychographics, lifestyles, beliefs, socio-cultural, class, and perceptions when choosing or selecting a market segment. Currently EKZNW is segmenting its products and not visitors, this shows that market segmentation is not well understood. There are segments worth investigating and investing for the Park, such as domestic long and short holidays, special interest breaks especially eco-tourism and educational groups. Differentiated marketing strategy is better suited for this Park because of its unique qualities of ecology and culture as a WHS. At the moment EKZNW is not using a targeting strategy and it is difficult to implement such a strategy unless market segmentation has been done. Once market segmentation has been done, EKZNW will be able to position for each target segment, provide the correct marketing mix and competitive advantage for each of the targeted markets.

6.3.4 Marketing and destination mix

EKZNW could introduce a strong educational eco-tourism program to contribute towards sustainability of the UDP WHS. For packages EKZNW can consider working with other organisations such as the car rental companies, tour operators, and Shot Left in order to create an ultimate eco-cultural experience for UDP WHS visitors. Shot Left is a tourism marketing

television program and campaign encouraging South African citizens to travel within their country.

The pricing strategy should complement the target market and must consider time of purchase, type of consumers, provision of discounts to the domestic customers and use of bundle pricing as done by most tourism businesses in UDP WHS. EKZNW needs to make sure that it delivers real value for money in terms of its eco-cultural products and services.

The promotion strategy should be formed that seeks to engage stakeholders, the public and staff in the UDP WHS and the conservation of the area. This strategy should target the key market segments that EKZNW wish to reach. This will help create confidence in EKZNW and eliminate any mistrust among stakeholders. Further it will help encourage safety of the visitors to the UDP WHS. EKZNW should focus on promoting UDP WHS through developing joint marketing of international World Heritage Sites. They should seek South African co-ordination of World Heritage Site promotion and pursue collaborative marketing with key South African World Heritage Sites. EKZNW should formulate within the eco-cultural tourism marketing strategy, a good relationship marketing strategy which will incorporate how they intend on dealing with various stakeholders that they have and to build good relationships with them.

EKZNW should seek partnerships with local tertiary institutions who can offer training within the tourism and environmental sectors. They should for the success of the organization attend more to communities within UDP WHS and help out with the projects. Proper guide training is needed and improvement of the accommodation quality is needed. Partnerships will foster good collaborative marketing and EKZNW should consider this for the wellbeing of the UDP WHS.

6.3.5 Branding

EKZNW should adopt a holistic branding approach that puts emphasis on the UDP WHS as a destination and an experience. It is important that EKZNW build partnerships with tourism businesses that operate in the UDP WHS area, this will also help with branding of the UDP WHS. EKZNW should allow all stakeholders to work in unison to promote the UDP WHS brand while providing the experience and quality the site has to offer. EKZNW should have one clear and simple brand name for the Site which reflects the tranquillity, ambience and cultural

aspects of UDP WHS. The UDP WHS should have an intensive brand identity that will integrate and build an emotional link with the Site and visitors.

6.3.6 Destination and Collaborative Marketing

There is still a lot of work to be done by EKZNW on this aspect. For the benefit and development of a holistic image of the UDP WHS as a tourism destination, all stakeholders need to work together to successfully promote the Site. Collaborative marketing efforts will give the UDP WHS a competitive advantage as a destination. EKZNW needs to embrace this idea of collaboration to gain competitive advantage.

6.4 Improvements to the Methodology

The study concentrated on only one EKZNW department (marketing). It did not take into consideration the interdependence of all EKZNW departments and the influence that these have on the effectiveness of marketing of the UDP WHS. This is an aspect that probably would have given more clarity of why marketing is conducted the way it is currently. However, within the limits of this research, it was not possible to physically interview all the EKZNW departments that might have an effect on how EKZNW markets itself due to time and budgetary constraints.

6.5 Further Research

Developing an Eco-cultural tourism marketing strategy for the UDP WHS would be an appropriate subsequent action after this thesis. Marketing in Protected Areas is a fairly new concept in supporting biodiversity conservation efforts (Bushell & Eagles, 2007). It would thus be worthwhile exploring an integration of a marketing strategy of the UDP WHS with the rest of the management plans of the Park. This might be done through developing a framework that would encourage and foster the integration using a more holistic approach to Protected Area management. It would also be good to compare processes involved in developing marketing strategies for World Heritage Sites in different Parks globally and to find best practice considering protection of both natural and cultural heritage.

The land claims process has ensured that it is imperative for EKZNW to co-manage their Parks with previously disadvantaged communities who had been displaced, but who are now co-owners of the Parks. Therefore collaborative marketing is a key aspect of this endeavour. The above means that all efforts of EKZNW can now be much more aligned with the marketing efforts to create a shared identity and brand with all stakeholders. Also there is a need for exploring partnerships, potential opportunities to address current challenges, and capacity building in marketing for the EKZNW employees.

CHAPTER 7

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APPENDICES

Appendix A: UDP WHS MARKETING INTERVIEW SCHEDULE

A. Background

1. What business is EKZNW in?

Probe: What needs does EKZNW/UDP WHS meet in the marketplace?

2. What services and/or products does UDP WHS provide?

3. What are the specific marketing objectives over the next two years?

Probe: What objectives address the following as goals?

- Number of tourists
- a. Revenue
- b. Profit
- c. Market share

B. Market

4. What is the market opportunity?

Probe: What is the market size with respect to geography and to the tourism industry.

5. How is the market segmented into logical customer groupings?

6. What are the key tourism industry trends that are fueling UDP WHS's success? What tourism industry trends can inhibit success?

7. What is the economic climate now and in the next couple of years? How will the economic climate affect tourism in UDP WHS?

8. Is UDP WHS or its market affected by business cycles or seasonality? How it is affected.

3. Target Audience

9. What market segments is UDP WHS targeting (segment name and characteristics)? What segments are not being targeted?

10. What is UDP WHS customer's primary reason for visiting or wanting to use its product or services?

11. Why would someone prefer UDP WHS's offering versus that offered by the competition?

12. Are there any issues or concerns that the target audience might have regarding this type of product or service?

D. Competition

13. What categories of competition threaten UDP WHS's success?

14. Which Heritage sites or destinations pose the greatest threat, and how do they differentiate themselves? What strategic or tactical elements do they use that threaten UDP WHS's success?

15. Which competitors have the largest market share within UDP WHS's target market segments? Which competitors have the greatest visibility with UDP WHS's target audience?

16. How will UDP WHS differentiate itself to best combat competition?

17. What barriers to entry into the marketplace is UDP WHS creating for itself?
What is UDP WHS doing so that it is not easy for others to enter the market place?

E. Offering

18. What need is the UDP WHS offering designed to fill?

19. What features and associated benefits does UDP WHS offering provide?

20. How does UDP WHS deliver the features identified in item B?

21. Of these features, which ones differentiate UDP WHS from the competition?

22. What improvements does UDP WHS make to their offering to better meet customer needs?

23. What new offerings would UDP WHS's customers most like EKZNW to develop?

F. Messages

24. What does each of UDP WHS's identified target audiences know and believe about EKZNW today?

25. What is the single most important message that must be communicated to ALL of UDP WHS's target audiences?

26. What evidence can be used to support the claim that UDP WHS make in their single most important message?

27. List the single most important message that must be communicated to EACH target audience.

28. What evidence can be used to support the claims for each message listed in item D?

29. What happy customers does UDP WHS have today that it can reference in its communications?

30. What kind of personality does UDP WHS want to portray in its communications? What tone? What flavour?

31. What is the overall impression about the organization that EKZNW want UDP WHS customers and partners to take away after each interaction with them?

G. Sales and Buying Process

32. What is the process for selling UDP WHS's services or products? Do they use any of the following processes?

- Direct personal sale
- Direct online sale
- Indirect through channels

33. Who is involved, both from EKZNW and from their sales channel partners, in each step of the sales process?

34. How does UDP WHS's target audience buy the Site's type of offering?

Probe: Is the visit an impulse one or a carefully planned visit?

35. What buying process steps do the members of the target audience follow?

36. What buying criteria does the target audience use to select an offering?

H. Pricing

37. How important is price in the decision process?

38. What is the current pricing structure, including discounts, product options, rebates, and so on? Do customers understand it?

39. Which of the competitors is considered the price leader? What does the price leader charge for its offering? How does the price leader determine its price?

40. What are UDP WHS competitors charging for their offerings?

41. What is the perceived value of UDP WHS offering as compared to its price?

42. What service(s) does UDP WHS currently include in the price of their product? What services can they consider now and in the future?

43. Are competitive price changes anticipated in the near future?

44. What tourism industry trends are going to drive prices down? What tourism industry trends are going to drive prices up?

Appendix B: UDP WHS SWOT ANALYSIS

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Dual status of UDP WHS (declared for its natural and cultural significance) • Well-developed visitor attractions and accommodation sector • Rich cultural heritage • Networks with tour operators • Government support for tourism as an economic contributor • Good range of ecotourism, heritage and complementary products including Guided tours, Rock art, hiking, and camping and nature of activities both heritage and eco-cultural • Geographic positioning of the UDP WHS • The friendly and committed EKZNW employees at the camps • The scenery, natural beauty, and accessibility of the Site • Positive destination image • Repeat customers 	<ul style="list-style-type: none"> • Poor marketing skills and weak market image • Lack of marketing strategic direction, lack of passionate people to market the area • Weak spending on market and marketing research, product is undersold and well hidden • Inadequate road infrastructure and signage leading to the UDP WHS • Fragmented marketing efforts between businesses and EKZNW • Miscommunication, e.g. guests thinking there is game viewing which leads to disappointed guests who were misinformed. • Low or no marketing budget for UDP WHS, marketing is below standard • Big trade shows do not prove to bear positive results, product is not known to the market • Drop in standard and levels of service • Lack infrastructure Maintenance budget for accommodation • Overpricing • Structural changes to do away with Zululand will add more responsibility to the management spreading it really thin
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Collaborative marketing with the tourism industry • Upgrading of roads around the Drakensberg Mountains will open up opportunities for tourism especially for the local communities as their involvement should be a huge part of a marketing strategy. • Development of a joint marketing strategy • Trends: changing customer needs to eco-cultural tourism • School groups, environmental education and the Kids Club loyalty program • All EKZNW camps are situated within the UDP WHS which make it easy to differentiate product from those offered by stakeholders outside the designated area. • Black diamond market is identified as the only growth point for UDP WHS. • Royal Natal hotel's wealth of history that is waiting to take off once the 	<ul style="list-style-type: none"> • Safety and security issues • Political instability and instability within communities sharing the Park • HIV/Aids and contagious diseases • Competition • Kruger National Park with its Big 5 is viewed as the major competition. • Negative publicity from the media • Recession • Seasonality and nature of the tourism product • Consumer perceptions that EKZNW is only about conserving nature and not offering holidays. • Environmental disaster such as wild fires in winter

<p>hotel is renovated.</p> <ul style="list-style-type: none">• Segment the market and develop specific tactics for each.• KwaZulu-Natal Tourism Authority has funding for marketing but must work with EKZNW to understand nature of product and how best to market it.• Government need to invest in educating the domestic market.• Invest in good publicity even through embassies around the world.• Cable car in the Mnweni area as an economic boost for local community• New markets can come from holding Jazz sessions, events and other types of cultural experiences.• Marketing and selling UDP WHS as a destination with product in line with nature and the reasons which led to its recognition as a WHS by UNESCO.• Partnerships with stakeholders (municipalities, government departments, communities and the private sector).• Agri-tourism (farming and tourism)	
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