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# AN INVESTIGATION INTO INTERNATIONAL TOURISTS' PERCEPTIONS OF CAPE TOWN AS A HOLIDAY DESTINATION



**One Destination - An Unforgettable Experience**



Prepared For: School of Management Studies



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## II PLAGIARISM DECLARATION

The author knows that plagiarism is wrong. Plagiarism is to use another person's work and to pretend that it is one's own. The author of this research has used the **Harvard Style** convention for citation and referencing. Each significant contribution to and quotation in this report from the work, or works of other people has been attributed, and has been cited and referenced. This thesis is the author's own work. He has not allowed, and will not allow anyone to copy his work with the intention of passing it off as his or her own work.

## III EXECUTIVE SUMMARY

The last 50 years have seen the tourism industry growing rapidly, suggesting that, at this turn of the millennium, the industry is beginning to mature. Already an enormous global industry, the future for tourism in the next 100 years seems full of tremendous possibilities and major challenges. For developing countries such as South Africa, the challenge remains to market, brand and position their country and products effectively in this increasingly competitive global market place. In recent years, South Africa and Cape Town in particular have experienced a growing interest from the international community as tourist destinations. Tourism is of significant importance to the South African economy as it accounts for almost 7% of South Africa's Gross Domestic Product (GDP) and employs 6.6% of the country's formal workforce. The tourism industry is of more importance to the Western Cape's economy as it accounts for approximately 9.1% of Gross Regional Product (GRP) and employs approximately 9.3% of the province's workforce. Approximately 770 000 overseas tourists visited the province in the year 2000 and this represents 51% of South Africa's overseas tourists.

The fundamental product in tourism is the destination experience. Despite Cape Town offering a unique experience, the destination lacks a clear and positive brand images that persuade international tourists to visit. Currently, it cannot be ascertained how international travellers perceive brand Cape Town. As such it is felt that a significant number of tourists are being forsaken. Thus, it is imperative that research be conducted in order to gain a greater understanding of the brand, thereby enabling Cape Town to be positioned in a manner that lives up to tourists' expectations. In April 2001, the Joint Marketing Initiative was created to align the marketing efforts of the various destination-marketing organisations responsible for marketing the province of Western Cape and the city of Cape Town both internationally and domestically.

This is necessary to achieve consistency in image and message communication. This investigation is one of many commissioned by the Cape Metropolitan Tourism to improve stakeholders' understanding of brand Cape Town. The main objective of this investigation is to provide an in-depth understanding of how international tourists currently perceive Cape Town as a holiday destination.

Both exploratory and descriptive research was deemed necessary to get an in-depth understanding of brand Cape Town. Consequently a combination of qualitative and quantitative research was used for this particular study. The qualitative research was comprised of a literature review to set the theoretical background for this research and in-depth interviews with international tourists. The aim of the literature review was to understand how destinations that are successful have been marketed and branded. The literature review identified that tourism is becoming a highly competitive industry and the message conveyed to the potential holiday-maker is one of increased choice. More destinations in more countries are now available, a wider variety of holiday types especially activity ones are on offer. Cape Town has a wide variety of natural and man-made attractions that underpin its tourism appeal. At present time, the city and the province need to be branded in an effort to bring a single-minded focus on promoting these destinations to national and international markets to attract trade, investment and tourism. The following is a summary of the literature review findings.

A destination is more than a geographical area, it is a combination of people, cultures, historical heritage, physical assets, and opportunities that are marketed in different ways to ensure the long-term success of a place (Kotler, Haider & Rein, 1993: 2). Place marketing emerged as a promising integrating process linking the potential competitive advantage of a place to its overall economic development goals (Kotler et al., 1993: 79). Within place marketing rests the study of how destinations are marketed. While place marketing looks at the needs and wants of tourists, exporters and investors, destination marketing focuses on the needs of both domestic and international tourists only. All tourism activities and experiences are generally given mental ratings, good or bad, and each individual given their likes and dislikes, has a preferential image of their ideal holiday destination. This conditions their expectations, setting an aspiration level or evaluative image, against which actual holiday opportunities are compared (Ashworth and Goodall, 1990).

An individual perception of a holiday destination is conditioned by the information available. This information may be derived from formal sources such as travel agents, holiday brochures or informal sources such as family and friends. Much activity in the tourism industry is aimed not only at informing the

potential visitor of the opportunities but also at being persuasive, creating a favourable image of a particular destination or tourism product. Much effort is therefore directed at formulating and marketing destination images and the range of destinations getting in on the act is forever widening as new market segments are tapped (Goodall and Ashworth, 1988). It is therefore important to consider the factors that influence image formation. Fakeye and Crompton (1991) described a process of image development linked to tourism promotion and destination choice. Image was proposed to evolve through three stages: organic, induced, and complex.

Organic image development represents an awareness of a destination before destination promotion is introduced. According to Gunn (1972) this organic image is formed as a result of general exposure to newspaper reports, magazine articles and other non-tourist sources. Induced images on the other hand, are formed when promotions are viewed and evaluated against organic images. These images are brought about by tourist-directed information such as advertisements and travel posters. Organic images tend to develop first and as such, may be regarded as having a stronger influence than induced image on overall image formation. Destination marketers have very little control over organic images as opposed to induced images. The complex image results from actual visitation and experience with the destination. Further Fakeye and Crompton (1991) linked these three types of image to the three functions of promotion: to inform, to persuade and to remind. Informative materials were hypothesised to be most effective at the organic stage, persuasive materials at the induced stage and reminding materials at the complex stage of destination image formation.

However, Chon (1990) suggested that a primary image is formed when a tourist has made a decision to travel somewhere. The tourist selects certain destinations as possible choices and it is these initial images which Chon describes as primary images. The construction of these primary images of destinations is based on certain push and pull factors. The pull factors are described by Chon as the attractiveness of a region and its various elements. The push factors on the other hand, are the needs and motives of consumers for travelling. However, Chon (1990) does not state that specific push factors are linked with specific pull factors or that an organic, induced or complex image must be present before a primary image can be constructed. It remains a complex set of associations that is not easily explained (Lubbe, 1998: 25).

Destination image is a key factor in the pleasure travel decision-making process (MacKay and Fesenmaier, 1997). Gartner (1993) argued that image formation agents differentially affect formation of mental destination images and therefore have important implications for creation and change of image by destination marketers. Destination images are subjective, temporally and culturally specific (Morgan and Pritchard, 2000). It is not only tourists who hold images of tourism places but intermediaries such as travel agents, industry suppliers, the population at large and the destination marketing organisations, all have differing images of the same destination. Therefore measuring destination image is paramount in order to design the most effective positioning, differentiation and marketing strategy for a destination (Echtner and Ritchie, 1993). Destination marketers should have a clear understanding of what variables may affect the destination image and how they contribute to the development of that image to emphasise the relevant attributes in any destination promotion campaign.

Most image studies in tourism have used a list of attributes to measure some of the more functional components of destination image, such as scenery, climate, facilities, and attractions. The main concern has been with the more tangible physical components of place perception commonly associated with designative images (Pearce, 1982; Walmsley and Young, 1998). The evaluative component of images appears to have been overlooked. Yet more recently, Echtner and Ritchie (1993: 3) proposed a comprehensive multidimensional definitional and measurement approach to destination image. They presented a framework, which suggests that to completely measure destination image, several components must be captured. These include attribute-based images, holistic impressions, and functional, psychological, unique and common characteristics.

The attribute-holistic dimension refers to a continuum of individual elements to an overall impression. For example, a destination's image is comprised of beliefs about specific attributes such as accommodation, climate, and ease of access as well as a more overall or holistic impressions (Echtner and Ritchie, 1993). Effective marketing strategies can be determined only after measuring the extent to which potential visitors perceive that a destination contains those attributes that they consider important (Ashworth and Goodall, 1990). The functional-psychological dimension distinguishes between the parts of image, which are directly observable for example, prices and those, that are intangible for example, friendliness. The third element, common-unique recognises what is similar about a destination and what is distinctive about it.

Echtner and Ritchie (1991, 1993) also recommend a combination of structured and unstructured methodologies to measure destination image. The structured approach involves various common image attributes being specified and incorporated into a standardised instrument, usually a set of semantic differential or likert scales. An unstructured approach employs an alternate form of measurement using free form descriptions to measure image. Attributes are not specified at the onset of the research but rather the respondent is allowed to more freely describe impressions of the destination product. Depending on the specific characteristics of an individual the images he or she forms will be different. Consequently, there is no single perceived image of a destination, rather it is associated with each individual consumer.

The image of a destination is inextricably linked to its brand. A brand embodies a set of values and attributes which stimulate consumer interest, which distinguish the brand from others and creates a unique piece of property for its owners. It uniquely and successfully blends together both tangible and intangible qualities and attributes (Keller, 1998: 5). The challenge of branding lies in the ability of the brand to polarise consumers by differentially developing its appeal to those consumers to whom it is particularly suited. The result of a successful brand positioning strategy is a distinctive brand image on which customers rely in making choices (Morgan and Pritchard, 1998: 141). Although there is general agreement that branding can be applied to tourism destinations, there is less certainty about how the concept translates into practical marketing activity. Morgan and Pritchard (1998) point out there is as yet very little empirical research that explores the application of branding to tourism products including destinations.

When a destination is branded, the brand name is relatively fixed by the actual name of the location. The power of branding lies in making people aware of the location and then linking desirable associations to the brand (Keller, 1998:19) that influence purchasing behaviour (Ries and Ries, 1998). The first stage in building a destination brand is to establish the brand's core values that should be durable, relevant, communicable and hold saliency for potential tourists. Once these core values have been established, they should underpin and imbue all subsequent marketing activity so that the brand values are cohesively communicated. The brand values should also be reinforced by brand elements, which ensure consistency of message and approach (Morgan and Pritchard, 2000: 281). Branding destinations combine marketing products and services and the commoditisation of people's culture and environment. The complexity of the issue requires a particular focused effort by tourism researchers since it embodies a multiplicity of concerns needing a multidisciplinary response (Gnoth, 1998: 759). Contrary to the focused marketing message with its USP (Unique Selling Proposition) mantra for product and services, destination branding is complex by design: a

rich brand is a gestalt made of multiple messages, associations and character traits. Identity is at the centre of the brand's essence, surrounded by benefits, attributes and emotion. The brand's essence draws on the soul, or core, of the brand to set the product or company or destination apart from all others in the category. The essence of the brand remains virtually unchanging as it travels to new markets and products (Winkler, 1999).

Given the complex nature of destination products, a destination brand usually will reflect the beliefs of its management and the idiosyncrasies of the organisations marketing it. This is often a major source of conflict between those responsible for marketing the brand and those who own the various components of the brand (accommodation, entertainment facilities, restaurants etc.). Co-operation between all players, both in the private and public sector, is therefore essential for the success of the brand. However, as travel destinations turn to branding for differentiation, they must comprehensively assess all their potential target markets and choose only those that will maximise their appeal. Targeting countries haphazardly can only damage the brand, as the values held by consumers in these countries may not be the values that the brand stands for. For branding strategies to be successful and brand equity to be created, consumers must be convinced that there are meaningful differences among brands. The brand must have a high level of awareness and familiarity among its customers who hold some strong, favourable, and unique brand associations in memory.

It has been suggested in the literature that emotional branding is an integral part of branding a destination. Emotional branding has also been labelled as mood-brand marketing where branding activities concentrate on conveying the essence or spirit of a destination, often communicated via few key attributes and associations (Morgan and Pritchard, 2000: 282). It is a useful method of destination branding where brand saliency is created through the development of an emotional relationship with the consumer through highly choreographed and focused communication campaigns. However, as Westwood et al. (1999: 240) argue, mere emotion is not enough, the key to develop a strong brand is the unique associations that customers hold in memory. While emotion has always been an important component of branding, emotion in the absence of a point of difference that can be articulated and firmly positioned in the memory is arguably a recipe for consumer confusion.

While branding refers to what images people have of a country, city or region and what kind of relationship they have with it, positioning on the other hand, takes the images and define the city, region or country by showing how it compares to competitors (Nickerson and Moisey, 1999: 217). It involves developing and

communicating key service attributes that are consistent with the brand image. It is a stage subsequent to market segmentation at which the marketer determines the needs that are best satisfied by the destination product/service offerings and how best to communicate the offering to the target market. It is a process of pinpointing, substantiating and delivering competitive advantage to create brand growth (Cape JMI, 2001). It provides a focus and mechanism for consumers to facilitate brand choice, which improve the effectiveness of external marketing activity and guides internal development of the brand.

The goal of destination differentiation is the establishment of point-of-difference associations. These associations are unique to the brand and are also strongly held and favourably evaluated by potential visitors (Keller, 1998). Point-of-parity associations are those associations that potential visitors view as being necessary for the destination to be a legitimate and credible product offering. They represent necessary but not sufficient conditions for brand choice. Point-of-parity associations also pertain to associations that are designed to negate other destinations' points-of-difference. Thus, competitive advantage stems from differentiation achieved by various elements of the destination offering through multiple linkages of various attributes and benefits in a complex and unique way that makes it difficult for competitors to copy.

Point-of-difference and point-of-parity associations contribute to a positive experience of the brand, satisfaction with the destination, which leads to consumers expressing a favourable attitude towards the brand. A favourable attitude translates into positive word-of-mouth, brand loyalty shown by multiple purchase of the destination product and a significant source of positive recommendation to other travellers. Consumers seek brand recommendations from others and limit subsequent information search to only those recommended brands or the recommended brand is used as a standard of comparison to evaluate other subsequently identified brands. Satisfaction or dissatisfaction with previous experience is also crucial because it affects expectations for the next purchase. This means that favourable tourist perceptions and attitudes are potentially an important source of competitive advantage (Kozak and Rimmington, 2000). The point of building a destination brand is to create long-term consumer patronage of the destination. Yet some consumers will not revisit, not because their expectations were not met, but more so because they want to experience new destinations.

Thus for brand Cape Town to be successful, some of the important factors that need to be considered are: the brand image and how the various target audiences relate to the brand, the consistency in image and message projection, co-operation between all stakeholders involved in the branding process, clearly defined

roles and responsibilities for destination marketing organisations, a clear understanding of the various target markets needs and wants amongst others. Based on the literature review, the author proposed a destination image formation and destination choice model. Conclusions were thereof drawn from the literature, which led to the formulation of the research objectives.

Adding to the above, in-depth interviews were conducted among eighty-five international tourists visiting Cape Town during the months of September and October 2001. The qualitative research took the form of face-to-face interviews with tourists. Their attitudes and opinions were sought on various issues affecting the brand. The main research objectives were to identify factors that are important to international tourists when choosing a destination; to determine tourists' expectations and perceptions of Cape Town; to identify the perceived brand image; to determine tourists' overall attitude towards the brand and to identify constructs that can be used in the design of a logo and positioning of the brand amongst others.

The majority of respondents were males (67%) and the average age was 27 years old. Nearly 95% of respondents were either on holiday or visiting family and friends (VFR) or both. More than half (52%) of the respondents were from the UK. The main activities they are involved in while on holidays include visiting historical sites (10.6%), tourist attractions (23.5%) both natural and man-made, participating in outdoor activities (23.5%), admiring scenic beauty (30.6%) and relaxing on the beach (27.1%). Climate/weather (32.9%) and value for money (25.9%) were the most important factors to international tourists when choosing a destination. Culture was another factor given that 21.2% of respondents mentioned that their main activity at a destination was experiencing the local culture and 22.4% mentioned it as a factor influencing their choice of a destination. Destination image was considered important by 27% of respondents while 25% considered it to be unimportant. Most of the respondents heard about Cape Town from family and friends (61%).

Table Mountain (35.3%) was by far the attraction that was emphasised the most to international tourists prior to their visit followed by the beach (22.4%) and wine farms (22.4%). Word associations with Cape Town revealed that Table Mountain (44.7%) is the word that was most strongly associated with the destination followed by beaches/sea (30.5%), and scenic beauty (16.5%). There seemed to be some congruency between what visitors expected of Cape Town and reality. However, 68.2% of respondents said that their perceptions had changed while visiting Cape Town. They were probed to find out what specifically had changed their perceptions of the destination, and interestingly enough, 18.8% of

respondents said that they found the city much safer than they expected, 10.6% said that the city is more beautiful than they expected while 5.9% said that the locals are friendlier than expected. Thus, in some instances visitors were unaware of what the destination had really to offer.

The destination mix elements namely attractions, accessibility, amenities and ambience were viewed positively by visitors. Most respondents (94.1%) agreed that Cape Town's attractions enhance the city's appeal while 61.2% found Cape Town easily accessible in terms of flight and visa requirements. However, 45.8% of respondents said that the quality of public transport needed desperate improvement. Also, none of the respondents had any negative comments about their accommodation while the word 'Laid Back' was used by 48.2% of them to describe the ambience (way of life) of Cape Town. Adding to these, 25.9% of respondents described the atmosphere as being vibrant. By far the variety of things to see and do (12.9%) and scenic beauty (12.9%) were the most favourable qualities of Cape Town followed by the friendliness of locals (11.8%), value for money (9.4%) and good service (3.5%). These were also attributes that differentiated Cape Town from its competitors.

Cape Town as a brand was perceived to be younger than South Africa and racial differences still accounted for how international tourists' perceived the brand personality. None of the respondents described Cape Town as a young black person, he or she was either white or coloured. Typically Cape Town was perceived as being in his early twenties to middle thirties, trendy and confident, rich and earning a higher wage than his/her South African counterpart. He or she lives a life of luxury and has no children. South Africa on the other hand is in his/her late forties and early fifties, employed as a farm worker, has many children and earns a low income. All respondents, however, had feelings of hope for the country and expressed their confidence in the youth of this country to make South Africa a better place. The brand strengths were identified as being the scenic beauty of the country, good value for money, variety of things to do and friendliness of local people. The weaknesses on the other hand, were perceived to be the poor public transport followed by the unpredictable weather and feelings of unsafety at night. Nevertheless, 83.1% of respondents said they would like to revisit Cape Town.

A probability sampling procedure was designed to collect data for the quantitative study. A systematic sample of 650 international visitors was interviewed at key tourist attractions in Cape Town. The V&A Waterfront, Kirstenbosch Gardens, Cape Point, Boulders beach and Camps Bay beach amongst others were used as sampling points. The survey took the form of face-to-face interviews with international visitors

using a questionnaire as the survey instrument. Data analysis showed that the survey polled almost equal number of males (49%) and females (51%). The average age of respondents was 40 years old, which indicates that the destination attracts a slightly older target market. Most respondents surveyed were from UK (44.3%), Germany (20.2%) and Netherlands (9.4%). The average length of stay in Cape Town was 10.9 days compared to 16.9 days for South Africa. It is interesting to note that 65.5% of respondents were on their first visit to Cape Town. Respondents in general had a monthly income of approximately between \$3500-6499.

This survey confirmed that good climate significantly influences the choice of a destination since 46% of respondents rated this factor as 'very important'. However, the most important factor when choosing a destination was beautiful scenery and natural attractions with the lowest average importance rating of 1.65. Personal safety was another very important factor as mentioned by 46.3% of international visitors. Destination image significantly influenced destination choice given its importance rating of 2.49 on average. In fact 44.1% of British, 40.4% of Germans and 50% of respondents from Netherlands rated this factor as being important.

There seemed to be a very good synergy between factors that influenced destination choice in general and factors that led to the choice of Cape Town as a destination. In fact, 38.3% of respondents chose Cape Town because it offered a consistently good climate/weather. Visiting family and friends (26.8%), scenery (18.1%), value for money (18.3%) and word-of-mouth (14.7%) were the other main factors that influenced the choice of Cape Town as a holiday base. Adding to this, international visitors were asked to rate the city on a number of attributes using an attitude scale. Scenery (4.7), value for money (4.5), and weather/climate (4.5) were rated as 'excellent' on average while friendliness of locals (4.3), service standards (4.1), local cuisine (4.2) and ambience (4.3) were rated as 'good' on average. Entertainment/nightlife (3.5), architecture/buildings (3.6) and infrastructure (3.3) left respondents feeling neutral on average.

In addition, safety at night (3.0) was rated 'neutral' on average but a significant number of respondents rated it as 'poor'. The shorter the length of stay in Cape Town, the better was perceptions of safety. In terms of service standards, the longer respondents stayed in Cape Town, the better was their perception of service standards. Word-of-mouth was on average the most influential source of information about the destination with 45% of respondents ranking it as first. International visitors' expectations were that the city offered a unique experience in terms of variety of things to see and do. They were indeed warned about crime before

their visit. Despite the city being rated unfavourably on perceptions of safety at night, 51.1% of respondents agreed that the crime situation is not as bad as one think it is. This needs to be marketed to change current negative perceptions of high crime levels at the destination.

International visitors had mixed feelings about whether Cape Town was marketed properly in their home country. Yet, 62.6% of respondents agreed that the image (post-arrival) they hold of Cape Town was distinct. Table Mountain was the word that had the strongest association with Cape Town as mentioned by 47% of international visitors. This was followed by sea/beach (33.3%) as the second most strongly associated word with Cape Town and sun (29.6%) as the third word. Nevertheless, when probed on other associations with the city, (74%) of respondents associated breathtaking scenery with Cape Town followed by inexpensive (70.1%), hospitable people (67.5%), and relaxed atmosphere (63.8%). Negative associations included poverty (48.6%) followed by many street-children (26.7%), unsafe (16.2%) and racial tension (14.5%). These are the weaknesses of the destination that need to be addressed urgently. They contribute significantly towards negative word-of-mouth about the destination. However, the range of positive words associated with the city far outweighed the negative ones. Words such as fascinating culture, vast/spacious landscape, cosmopolitan city, lush/green environment, and variety of activities are strengths that could potentially be used in marketing the destination.

Also, scenic beauty (35.4%), friendliness of locals (26.5%), value for money (19.3%), beaches/mountains (16.2%), culture (10.6%), and variety of things to see and do (10.4%) were attributes that significantly differentiated the destination. They can be used to build the sustainable competitive advantage of Cape Town. Also, 63.5% of respondents felt that they had a very positive overall image of the destination in their mind. Most respondents strongly agreed (59.1%) and agreed (38.3%) that they will definitely say positive things about the city to friends, relatives and colleagues. This is much-needed positive word-of-mouth about the destination. Respondents were very likely (69.4%) to recommend the destination to others. Of those respondents that were extremely satisfied with the destination experience, 79.7% will spread positive word-of-mouth, 78.7% are very likely to revisit and 71.5% have an extremely positive image of the destination. These in essence show the positive overall attitude that international visitors have towards brand Cape Town.

Finally some of the conclusions and recommendations made were as follows. The rationale behind building brand Cape Town must be an in-depth understanding of the needs of international visitors and how to

position the brand to satisfy those needs that differ according to purpose of visit, gender, country of origin, length of stay amongst others. In addition, each target market requires different functional, emotional, and experiential benefits from the brand. The power of the brand lies in the minds of consumers and what they have experienced and learned about the brand over time. Cape Town is not the brand that comes foremost to the minds of international travellers when they think of international destinations. At present brand recall for Cape Town is practically non-existent but there seems to be good brand recognition rates in some target markets. Cape Town has favourable associations with good weather, scenic beauty, cultural diversity and good value for money. Choosing which one of these to link to the brand requires careful analysis of the visitor and competition to determine optimal positioning of the brand.

The existence of strongly held, favourably evaluated associations that are unique to the brand and imply superiority over other brands is critical for the brand's success. The more abstract and the higher the level of association of an attribute or benefit with a brand, the more likely it is to be a sustained source of competitive advantage. A significant point of difference association with Cape Town is its scenic beauty while point-of-parity association such as value for money is necessary for the product offering to be a legitimate and credible one. The value proposition of the brand needs to be better on a significant number of attributes to justify the extended flight and costs that visitors have to endure. The variety of positive words associated with the destination provides significant marketing opportunities to build a strong brand with rich visual imagery and verbal associations.

## IV GLOSSARY OF TERMS

<b>ANOVA</b>	Analysis of variance to determine whether samples came from populations with equal means.
<b>AVG</b>	Added Value Group
<b>Central Office Edit</b>	Thorough and exacting scrutiny and correction of completed data collection forms, including a decision about what to do with the data.
<b>Chi-square Statistic</b>	Statistical test to determine whether some observed pattern of frequencies correspond to an expected pattern.
<b>Cluster</b>	Natural groupings of objects base on the relationships of the variables describing the objects.
<b>CMT</b>	Cape Metropolitan Tourism
<b>DMO</b>	Destination Marketing Organisation
<b>Eigenvalue</b>	The total amount of variation explained by a factor.
<b>Factor Loadings</b>	Quantity that results from a factor analysis and indicates the correlation between a variable and a factor.
<b>IMC</b>	Integrated Marketing Communications
<b>Inertia</b>	Percentage of total variation explained by a dimension in a perceptual map.
<b>JMI</b>	Joint Marketing Initiative
<b>LTB</b>	Local Tourism Board
<b>MICE</b>	Meeting, Incentive, Conference and Exhibition market.
<b>RTB</b>	Regional Tourism Board
<b>Scheffes Test</b>	Whenever one finds unexpected results in an experiment one should use post hoc procedures to test their statistical significance. Scheffes test is one method for post hoc comparison of means.
<b>SIM</b>	Strategic Image Management
<b>TALC</b>	Tourism Area Life Cycle
<b>USP</b>	Unique Selling Proposition
<b>Varimax Normalised</b>	Angle of rotation of a factor solution done to facilitate substantive interpretation of factors.
<b>Factor Rotation</b>	
<b>WCTB</b>	Western Cape Tourism Board

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# CHAPTER 1

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## INTRODUCTION

# 1. INTRODUCTION

The last 50 years have seen the tourism industry growing rapidly, suggesting that, at this turn of the millennium, the industry is beginning to mature. Already an enormous global industry, the future for tourism in the next 100 years seems full of tremendous possibilities and major challenges (Ritchie and Crouch, 2000: 1). For developing countries such as South Africa, the challenge remains to market, brand and position their country and products effectively in this increasingly competitive global market place. Competitiveness of destinations go beyond developing an attractive image, a strong brand and an enticing destination mix, developing countries must also balance the strategic objectives of all tourism stakeholders as well as the sustainability of local resources.

The 'new tourism' articulated by Poon (1993), and the global trend toward non-traditional destinations and long-haul travel, points to changing traveller needs in terms of destination experiences (Ritchie and Crouch, 2000: 1). Hence, South Africa has to capitalise on such an opportunity given that it is considered to be a long-haul and non-traditional destination. Destinations need to differentiate their products and develop partnerships between the public and private sector in order to co-ordinate delivery and build a strong image. Taking advantage of new technologies and the Internet enable destinations to enhance and reinforce their competitiveness by increasing their visibility, reducing costs and enhancing local co-operation (Buhalis, 2000: 97). Destination marketing in essence must lead to the optimisation of positive tourism impacts, reduction in negative tourism impacts and the achievement of the strategic objectives of all tourism stakeholders.

This thesis aims at providing an insight into how a destination should be branded with particular reference to Cape Town. It contributes toward a greater understanding of how international tourists choose a destination for holiday purposes and what makes them choose brand Cape Town over competing destination brands. It will assist tourism stakeholders in understanding the factors that contribute to the competitiveness of brand Cape Town, attributes that differentiate the brand and how it should be positioned in the international market place. This introductory chapter begins with a brief overview of tourism in South Africa, Western Cape and Cape Town. It then moves on to define the marketing and research problems to be investigated.

## **1.1 TOURISM IN SOUTH AFRICA**

Tourism is of significant importance to the South African economy as it accounts for almost 7% of South Africa's Gross Domestic Product (GDP) and employs 6.6% of the country's formal workforce (Grant Thornton Kessel Feinstein tourism trend card, 2001). SA Tourism (formerly SATOUR) is responsible for marketing South Africa as a destination internationally. SA Tourism operates within the institutional structure of the Department of Environmental Affairs and Tourism (DEAT). This structure is characterised by high levels of direct government regulation and facilitation, for example, substantial bureaucracy, regulations, incentives and government ownership of tourism facilities.

Presently, several provincial governments are viewing tourism as a major source of economic growth and thereby investing in the development of attractions and facilities. Lendrum (2000: 3) questions such development specifically and state that all nine provinces are competing for the international dollar when many potential visitors hardly know about 'South Africa', let alone the provincial names. There are literally hundreds of tourism bodies trying to promote their village, town, city or province. However, all these need to be co-ordinated within a national framework. As a result, issues of power, delegation, responsibility, marketing and tourism development have become a contentious point of debate among stakeholders in the tourism industry in South Africa.

SA Tourism has traditionally relied on a promotional push strategy to market the destination. Such a strategy entailed the travel trade (travel agencies and tour operators) to be the driving force behind the marketing and promotion of the destination. This now needs to be complemented with a strong consumer pull initiative. The travel trade will not sell South Africa if they perceive that the destination is unsafe or does not satisfy the needs of the potential traveller. Also, in a world of increasing dis-intermediation the consumer will seek out their own route to market, for example, the Internet and this may or may not involve traditional channels (Bannister, 2000: 9). Any tourism marketing initiative requires a consistent presence to be effective. This in turn requires consistent and substantial funding. Funding has been another area of constant debate within the industry where it is felt that inadequate funding is hampering the role and function of SA Tourism as a market-driven catalyst that is adequately resourced and funded to fulfil its mandate.

SA Tourism realises that South Africa, as a new brand will only succeed internationally, if the initiatives of bodies such as foreign affairs, trade and industry, and arts and culture, are aligned with tourism to create one brand image, positioning, and personality. Armed with a bigger-than-ever budget (albeit minuscule in comparison to that of most developed countries) SA Tourism is working hard to attract more foreign visitors to South Africa and to reposition the brand called South Africa. An equally important goal for the organisation is to encourage South Africans to become tourists in their own country. Furthermore, Owen Leed - Chief Marketing Officer for SA Tourism, states that “*SA Tourism is trying to represent all the provinces of South Africa as we aim to grow tourism in every part of the country. The name ‘South Africa’ does not help. There is a perception that South Africa includes the whole Southern African region. While we realise this is an incorrect perception, the reality is that what happens in the region affects South Africa. We will ride on local brands where appropriate to counter these negative perceptions*” (Dicey, 2000: 16).

Despite the ongoing debate on how South Africa should be marketed by whom, when and where, one needs to recognise the wealth of assets that underpin the country’s tourism appeal and its diverse natural and cultural experiences which are the main factors attracting international tourists. South Africa received 5.87 million foreign visitors in 2000, a decrease of just over 0.3% over 1999. Foreign visitors to South Africa include overseas and African arrivals. The number of overseas tourists to South Africa during 2000 was estimated at approximately 1.5 million (Grant Thornton Kessel Feinstein tourism trend card, 2001).

## **1.2 TOURISM IN THE WESTERN CAPE**

After briefly reviewing the tourism industry in South Africa, the focus is now on the tourism industry in the Western Cape. The Western Cape Tourism Board (WCTB) is responsible for marketing the province to international tourists once they get to South Africa. The board works closely with the private sector, public authorities and community to ensure tourism growth in the province thereby benefiting its inhabitants. The Western Cape Tourism Board is made up of eight regional tourism bureaux (RTOs) that market their region once domestic and international tourists are in the province. One of the goals of the Western Cape Tourism Board is to establish and promote a strong, vibrant Cape brand.

In line with the recommendations of the knowledge economy White Paper, the Western Cape region is referred to as ‘The Cape’. Marketing and branding of the province has been aimed at positioning ‘The Cape, South Africa’ in the international market place. ‘The Cape’ brand has been established to enable the Western

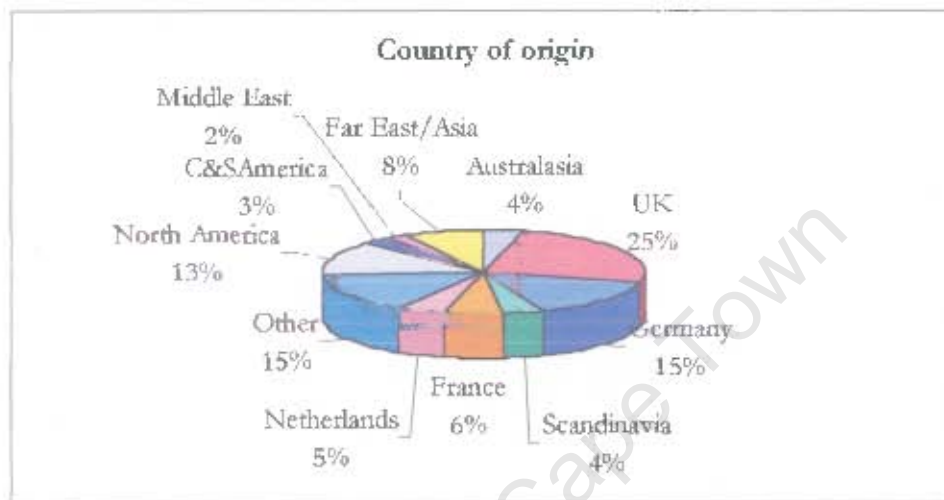
Cape to hold its own alongside internationally recognised products and brands such as 'Cape Fruit' and 'Cape Wine'. The brand capitalises on the profile of Cape Town as a tourism gateway to Africa to build its strengths. The Western Cape Tourism Board has ensured that marketing and branding initiatives are reflective of all cultural groups and the heritage of the entire Western Cape society (WCTB Annual Report, 2000: 4). The advantage of taking the high ground through branding the Western Cape in a simple but powerful way as 'The Cape' lies in the potential advantages that other areas carrying the Cape prefix as part of their names such as the Eastern and Northern Cape could enjoy (Anderson, 2000: 7). Yet, one of the most important criticisms of 'The Cape' brand has been the existence of many 'capes' around the world and how this one is different from the rest.

The province is up against powerful competitors such as the Caribbean Islands, Florida and the Mediterranean Islands with resources far greater than theirs, which are far closer to major markets (Europe and North America) and better known destinations. This makes it vital to position 'the Cape' as part of a total Southern African experience worth travelling a long way to enjoy (Anderson, 2000: 3). The brand is concurrently used for promoting direct investment and exports. Thus, brand consistency is of paramount importance in order to convey a consistent message and image for all three markets namely tourism, investments and exports. The brand must be marketed and positioned as a uniquely attractive destination and a thriving economic entity to create confidence in the future amongst the people of South Africa and external target markets.

It will be paramount for 'The Cape' to distance itself image wise from the rest of Africa and develop the belief that the Cape is different. Sporadic incidents of urban terrorism and high levels of general criminality has tarnished South Africa's image internationally (WCTB Annual Report, 1999/2000). While these incidents were limited in numbers and frequency, the negative perception created for the South African and Western Cape tourism markets cannot be underestimated. Every strategy implemented must be aligned with, and enhance the brand positioning, image, values, personality and proposition as outlined in the draft brand blueprint for 'The Cape'. This is vital if the province wants to achieve a unique and powerful positioning and gain a sustainable competitive advantage for the region and its inhabitants.

Another goal of the Western Cape Tourism Board is to increase the Western Cape's share of the domestic and international tourism markets in terms of visitor numbers, length of stay, and visitor expenditure. It is estimated that the tourism industry in the Western Cape accounted for approximately 9.1% of Gross

Regional Product (GRP) and employed approximately 9.3% of the province's workforce in the year 2000 (Grant Thornton Kessel Feinstein Tourism Trend Card, 2001). Approximately 770 000 overseas tourists visited the Western Cape in the year 2000. This represents 51% of South Africa's overseas tourists visiting this province. The breakdown of overseas visitors to the Western Cape by source market is very similar to that of South Africa as a whole, with visitors from Europe accounting for almost 70% of all overseas visitors to the province as shown in **Figure 1** below.



Source: Grant Thornton Kessel Feinstein Tourism Trends Card 2001

**Figure 1:** Origin of Visitors to Western Cape

The 1999/2000 financial year saw the Western Cape Tourism Board focusing its efforts on destination marketing and branding. The Cape brand being a 'new' brand was given as much exposure as possible to create a lasting brand image and brand awareness. This highlights the importance of brand building for a destination in the early stage of its Tourism Area Life Cycle (TALC). In this stage, the potential for tourism development is recognised and marketing activities are undertaken to further increase number of tourist arrivals. On the other hand, Cape Town can be viewed as being in a later stage of its lifecycle, where the brand is already known and the destination seeks other ways of attracting tourists. Hence, marketing the region (the Cape) as opposed to the city (Cape Town) becomes a problematic task with each destination in a different stage of the TALC. Also, categorising a destination in a particular phase of the TALC is contentious as destinations undergo continual change, which complicates issues of positioning, branding and marketing.

Among the challenges identified by the Western Cape Tourism Board to create a strong Cape brand include issues of safety and security, health, obtaining adequate funding for international marketing, and strengthening co-operation with SA Tourism. During a period characterised by economic volatility, increased competitiveness within the industry and severe limitations in terms of marketing spend, the sustained growth of tourism in the province is ultimately dependent upon a positive perception in the market place of South Africa and the Western Cape. The challenge lies in overcoming the current negative perception of safety and security in the country. The 2.5% decrease in international tourist arrivals in 2000 to the Cape is of concern and can be attributed partly to negative perceptions of the destination by international travellers (Grant Thornton Kessel Feinstein tourism trend card, 2001). This raises doubt on the effectiveness of marketing efforts by the various destination marketing agencies responsible for marketing and promoting the province.

In turn, the decrease in international visitors to South Africa is of more concern when compared to other destinations within Southern Africa sustaining double-digit growth rates. There are a number of factors such as political instability in the region, high crime rates, and lack of funding that can be blamed for the present negative growth rate. Marketing and branding of a destination can to some extent counter these negative factors and increase number of international tourists' arrival to South Africa and the Cape. Therefore, the potential of the Cape becoming a powerful brand name cannot be underestimated if the right approach is adopted. Nevertheless, the tourism industry in the Western Cape and Cape Town have been very optimistic in 2001 where the destination has been described as having a 'bumper' season due to improved perceptions of safety after the September 11 terrorist attacks on the US. At this point in time no official figures on foreign arrivals are available to back up these claims.

### **1.3 TOURISM IN CAPE TOWN**

The Cape Metropolitan Tourism (CMT) is one of the eight Regional Tourism Organisations (RTOs) in the Western Cape. It is responsible for marketing the Central Business District (CBD) to domestic and international tourists. This regional office is further made up of six Local Tourism Bureaux (LTBs) namely, Blaauwberg, Tygerberg, Cape Town, Oostenberg, Helderberg and the Cape Peninsula. These Local Tourism Bureaux have the responsibility of marketing their local areas to tourists thereby accentuating the duplication of effort in attracting tourists to the province. The Local Tourism Bureaux also promote local

tourism organisations that are their members or sponsors. The Cape Town Tourism bureau (formerly CAPTOUR) is one of the local tourism bureaux marketing Cape Town.

Cape Town Tourism has the responsibility of promoting the personality of Cape Town as a city. It is believed that Cape Town has the potential of becoming the preferred tourist destination in Southern Africa due to the city's stance locally and internationally as one of the most beautiful cities in the world. Currently, SA Tourism, the Western Cape Tourism Board and Cape Metropolitan Tourism are either directly or indirectly engaged in marketing Cape Town to international and domestic markets. Cape Town Tourism's marketing strategy operates on two primary pillars. The first is their activities concerning the marketing of the Cape Town municipal area as a tourist destination and the second is the function with regard to the marketing of their organisation to prospective members and sponsors, and the building of relationships with them (Cape Town Tourism Annual Report 2000/2001).

Cape Town is still the most popular destination for foreign tourists in South Africa with top attractions such as the V&A Waterfront, Cape Point, Table Mountain and the winelands. *"Tourists do not visit regions but rather cities, and therefore the focus should always be on promoting Cape Town as a destination. This will never detract from all the other attractions that the province has to offer. Cape Town is an internationally renowned city and a brand name in itself with Table Mountain as its icon"* (Hj Taljaard – Chairman Cape Town Tourism). This is an area of constant debate in the industry where consensus needs to be reached on whether to promote the city or the region internationally. As Bannister (2000: 11) puts it, *"it is relatively easy to promote Cape Town – it is after all a global brand – but does this approach help the Northern Province? Until brand South Africa is on the mental mind maps globally, it is imperative to promote the country using provincial, national and cultural icons as 'arrows in our national quiver'."*

While the growth of tourism depends on participation and action at the local (town) level, it is vital that the activities and resources of the various tourism tiers – national, provincial, regional, and local – are effectively co-ordinated and synergised. This has led to propositions of restructuring of SA Tourism and the Unicity process in the Cape Metropolitan area that will hopefully enhance such synergies. The creation of the Unicity heralds positive changes for the Cape Town tourism industry. The proposal is to establish a single Cape Town visitor and convention bureau for the greater Cape Town metropolitan area. Existing Local Tourism Bureaux such as Cape Town Tourism and the regional tourism organisation (Cape Metropolitan Tourism) will be amalgamated into the bureau creating a co-ordinated tourism synergy.

The creation of the Joint Marketing Initiative (JMI) in April 2001 between the province of Western Cape, the City of Cape Town's Council and Local Government is having a positive effect on synergy and co-ordination between the different players in the city and province. The JMI has the responsibility of focusing and aligning the marketing efforts of the various tourism bureaux, investment agencies and other marketing entities to ensure that the image of Cape Town and the Cape is translated into a single brand. This will enable the development of tourism, event management, trade and export promotion, investment promotion, and the development of the film and television industry. The end goal of such a process is to promote sustainable and rapid economic growth, vibrant entrepreneurship, job creation and increasing per capita income.

## **1.4 PURPOSE AND IMPORTANCE OF RESEARCH FOR CAPE TOWN AND WESTERN CAPE TOURISM INDUSTRY.**

Marketing of destinations can reflect socio-political, economic and cultural change. The nature and the use of tourism representations used by tourism marketing bodies in their branding strategies is thus constrained by historical, political and cultural discourses (Pritchard and Morgan, 2001: 168). Importantly, however, such discourses are constantly evolving and shaping the image of a destination. South Africa and Cape Town are still in considerable transition economically, socially, politically and culturally and therefore destination-marketing organisations need to monitor changes in customers' perceptions of the destination. Such a monitoring process is crucial to ensure the competitiveness of the destination in international markets. This research will assist the Western Cape Tourism Board, Cape Metropolitan Tourism and Cape Town Tourism to understand international tourists' perceived image of Cape Town as a holiday destination. It can serve as a benchmark to track changes in customers' perceptions of the destination overtime thereby highlighting effectiveness of marketing campaigns in creating a positive image of the destination.

At the same time, it must be recognised that the image of a destination is perhaps the single most influential factor in choosing a destination. Such an image is dependent on how the destination is marketed which is essentially based on how well the destination brand communicates its benefits. Cape Town as a brand is in the process of rejuvenating itself to better satisfy the needs of an increasingly competitive market place and changing traveller needs. So far there has been no research focusing on what the brand stands for in the eyes of the customer. This is critical for correct differentiation and positioning of the brand. This research will shed light on how international visitors perceive the brand currently, its strengths and weaknesses.

Nonetheless, of more importance is whether promised brand delivery matches or exceeds expectations of customers. This has a significant impact on repeat visit to the destination. This study will highlight the existence of any gaps between expectations and perceptions. Also, the success of any brand is largely dependent on whether it satisfies customers' needs. This research will attempt to measure satisfaction levels of international tourists with regards to the destination experience. Such an experience is largely dependent on the destination mix (amenities, attractions, accessibility, and ambience). Such measurements will help to constantly keep in touch with changing customer needs.

At this point, it is worth mentioning that South Africa is in the process of rebranding. The problem is to define the 'unique identity' of South Africans and to market this as a single brand. The same problem applies to marketing and branding of the Cape as a destination. This research can therefore provide a significant input on the marketing and branding of South Africa through its relevance to the issues that are being dealt with at a national level. It needs to be mentioned that it is much more difficult to brand a country as diverse as South Africa with its own set of problems than a region or city. This is because the brand has to communicate what the nation is all about, from its people, values, and culture to its infrastructure, attractions and economic prosperity. On the other hand, branding a region such as the Western Cape has to take into account these issues but to a lesser extent since the tourists are already in South Africa. The challenge shifts to getting them to visit the province and exceeding expectations once they have bought into the potential experience that the country can provide as a destination. The brand must still reflect the multi-faceted element of the destination.

This research is always an opportunity for customers and industry stakeholders to voice their dissatisfaction with any aspect of the destination. The combination of qualitative and quantitative research methodologies will enable international visitors and stakeholders in Cape Town tourism industry to express freely their opinions on how Cape Town should be marketed, differentiated and positioned. This is vital to bring co-ordination and synergy in marketing efforts. Both the supply and demand side of the tourism system must buy in the JMI process for it to be effective. This research is an opportunity to gather intelligence on the amount of support that the industry has in the process in terms of improving effectiveness of marketing efforts.

## **1.5 MANAGEMENT/MARKETING PROBLEMS**

The fundamental product in tourism is the destination experience. Destinations can be cities, regions, states or nations (Ritchie and Crouch, 2000:1). Considerable effort and funds are currently being invested to enhance the reputation of South Africa as a safe place to visit. The goal is to improve the touristic image and attractiveness of the place. This reputation of unsafety has tarnished the brand image of Cape Town and has significant potential of affecting the success of 'The Cape' brand. It is therefore necessary to conduct research to find out the extent of damage on both brands by such negative perceptions. However, the focus of this research is on the Cape Town brand. It is important to identify how international visitors, given the increasing choice of destinations they are faced with when deciding to go on a holiday, perceive the brand.

This in effect requires an understanding of the factors that influence destination choice in general and those that are specific to Cape Town. In short, an understanding of tourists' expectations and perceptions. Armed with such knowledge, the brand can be repositioned in the most effective way to cater for the various needs of the various target markets. The way the brand is positioned is largely dependent on factors that differentiate and accentuate the uniqueness of Cape Town. Uniqueness is the basis for sustainable competitive advantage of a destination.

Also, there must be synergy between the positioning of South Africa, Western Cape and Cape Town. At present, such synergy is lacking. Therefore it is difficult to ascertain the brand image, brand associations and brand awareness of Cape Town. This research will explicitly measure brand equity of Cape Town in terms of image, awareness and associations. The strengths and weaknesses of the brand will underpin the brand management strategy that will be recommended to Cape Metropolitan Tourism.

### **1.5.1 SIGNIFICANCE OF THE MARKETING PROBLEMS**

The problems mentioned above could significantly impede on the success of brand Cape Town if rigorous research is not undertaken. The current unique selling proposition of the city is elusive. One cannot deny that the city offers a product that has a strong tourism appeal but the strengths that Cape Town is seen as having, are strengths which other places or countries have – Western Cape is beautiful, so is KwaZulu-Natal, so is South Africa and so too is Spain and Australia. The problem is therefore to find something that is a strength, but more importantly, a strength that can be leveraged against international competitors; a strength that can be used to favourably position the city both in domestic and international markets. This

will help to distinctly position the brand in the mind of consumers. Brand positioning is thus essentially about the target market, nature of competition, point-of-parity associations, and point-of-difference associations (Keller, 1998:77). The first two considerations help to define the frame of reference for the brand. The latter two considerations help to create the exact location of the brand in consumer minds. Such issues are pertinent to this research and will have to be examined when devising the positioning strategy for brand Cape Town.

## **1.6 RESEARCH PROBLEMS**

The research problems can best be explained by the following succinct questions:

- What factors are relevant to international tourists when choosing a destination? How important is each of these factors?
- What attributes influence the choice of Cape Town as a holiday destination?
- What are international visitors' current expectations and perceptions of the brand?
- What is the brand image of Cape Town?
- What attributes differentiate Cape Town as a tourist destinations? Are these attributes unique to the city?
- Are international tourists satisfied with the destination experience?
- How do international tourists rate the attractions, amenities, accessibility, and ambience of the destination?
- How likely are tourists to visit again and disseminate positive word-of-mouth about the destination?
- Are there any gaps between brand promise and brand delivery as perceived by the supply-side of the tourism system?

Insights from the literature review (Chapter 2) will be used to formulate the research objectives that will attempt to provide theoretical answers to the above questions. Then a combination of qualitative and quantitative research methodologies will be used to further understand the problems at hand and potential solutions to the problems.

## 1.7 SCOPE AND LIMITATIONS

### 1.7.1 SCOPE

This investigation has covered limited aspects of destination marketing, destination image and destination branding of Cape Town as a holiday destination due to the constraints imposed on the study. Consequently, only those aspects that have been considered to be relevant to the marketing and tourism field with specific emphasis on the Cape Town brand have been explored. The exploratory stage of this investigation has been based mainly on the literature review, experience and in-depth interviews with no focus groups being conducted due to limited financial support received for this research. The questionnaire, as part of the quantitative research, was administered in peak demand season and hence a more accurate representation of respondents' evaluations of Cape Town was obtained. By no means is this study representative of the opinions of international tourists visiting Cape Town during **non-peak season** (winter). However, the rigorous probability sampling method used for the quantitative study makes the findings representative of international tourists visiting Cape Town during **peak season** (summer).

### 1.7.2 LIMITATIONS

Within any given investigation, certain limitations arise. For this reason, it is imperative to identify beforehand what these limitations are. As with any research, funding is a serious constraint. The author is grateful that Cape Metropolitan Tourism sponsored this research. Empirical research was restricted to specific areas within the greater Cape Town area due to time constraints, financial constraints and lack of co-operation from Table Mountain Aerial Cableway Co. Ltd. Most of the in-depth interviews were conducted in the Central Business District (CBD). Cultural and language limitations are inherent to this study given that the target population is international tourists that are not always fluent in English or have sufficient understanding of the English language to perform activities that were required of them as part of this research.

## 1.8 PLAN OF DEVELOPMENT

**Chapter 1** has introduced the topic to be investigated through a brief overview of the tourism industry in South Africa, Western Cape and Cape Town. The value of the research to the tourism industry in Cape Town was then identified. The problems pertinent to this research were stated and the scope and limitations were identified.

**Chapter 2** reviews the findings from the **literature review** pertinent to the various topics and sub-topics that surround the marketing and branding of a tourism destination. The literature review assisted in identifying factors, variables and constructs that influence destination marketing and branding. Conclusions drawn from the literature review were used to formulate the research objectives.

**Chapter 3** deals with the **qualitative research methodology** that was used for the exploratory research section of this study. In-depth interviews with international tourists were used to get a further understanding of the problems at hand. The chapter then follows with the **findings** from the **in-depth interviews** and conclusions drawn from those interviews. The chapter ends with the research hypotheses derived from the qualitative research as a whole (Chapters 2 and 3).

**Chapter 4** outlines the **quantitative** research methodology that was derived from the qualitative research. The rationale behind the survey instrument used for the quantitative study is explained. The sample design is formulated with respect to sampling method, sampling elements and method of data collection. The survey errors encountered for this research are then reported.

**Chapter 5** introduces the empirical research findings based on the 585 international tourists interviewed. These findings attempt to validate the in-depth interview findings and relate the findings to the literature review. More specifically, the findings of the quantitative research are compared to findings from the annual Cape Metropolitan Tourism visitors' survey.

**Chapter 6** outlines the conclusions that can be drawn from both the qualitative and quantitative studies.

**Chapter 7** outlines the recommendations made to the tourism industry in Cape Town and more specifically to Cape Metropolitan Tourism.

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# CHAPTER 2

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## LITERATURE REVIEW

This chapter introduces the literature review findings. The chapter begins with a review of existing literature and latest thinking on destination marketing, destination image and destination branding. Not much has been written on the branding of cities world-wide but the author has made use of product and service branding to identify the critical factors or issues surrounding the branding of a destination. The discussion begins with an overview of place or destination marketing, addressing the issues of 'why should a place be marketed' and 'how should it be marketed.' Following this is a discussion of the importance of destination image in destination choice and the components of destination image. A considerable amount of the literature review is then devoted to destination branding, brand image, and brand differentiation. This section is of particular importance to stakeholders in the tourism industry as it reviews how destinations such as Spain, Rio de Janeiro, Australia and Britain have been branded.

Throughout the literature review certain sections are highlighted to emphasise the importance of the theoretical concepts that have been used by the author to formulate his own model of destination image formation and selection process. The model is presented after the literature review and its relevance to the tourism industry in Cape Town is emphasised throughout the literature review. Thereafter, general conclusions drawn from the literature review are presented, which serves to formulate the research objectives.

## **2.1 PLACE MARKETING**

A place is more than a geographical area, it is a combination of people, cultures, historical heritage, physical assets, and opportunities that are marketed in different ways to ensure the long-term success of a place (Kotler, Haider & Rein, 1993: 2). Place marketing emerged as a promising integrating process linking the potential competitive advantage of a place to its overall economic development goals (Kotler et al., 1993: 79). Ashworth and Voogd (1988: 68) describe place marketing as defining an area such as a city or region, as a place product, developing and promoting it to meet the needs of identified users or customers. It encompasses changing the buying behaviour of the targeted customer groups and may also include political, social and economic motives to influence everyday behaviour. It involves maximising the efficient social and economic functioning of an area in accordance with whatever goals have been established. Such an area for example, is the greater Cape Town made up of six distinct regions namely Blaauwberg, Tygerberg, Oostenberg, Helderberg, South Peninsula and Cape Town. The goal of place marketing is to maximise economic and social prosperity of such a place.

Place marketing is often the responsibility of the public sector either exclusively or in conjunction with the private sector. The challenge of place marketing is to strengthen the capacity of communities and regions to adapt to their changing market place, seize opportunities, and sustain their vitality. Place marketing, at its core, embraces four activities:

- Designing the right mix of community features and services.
- Setting attractive incentives for the current and potential buyers and users of its goods and services.
- Delivering a place's products and services in an efficient and accessible way.
- Promoting the place's value and image to ensure that potential users are fully aware of the place distinctive advantages (Kotler et al., 1993: 18).

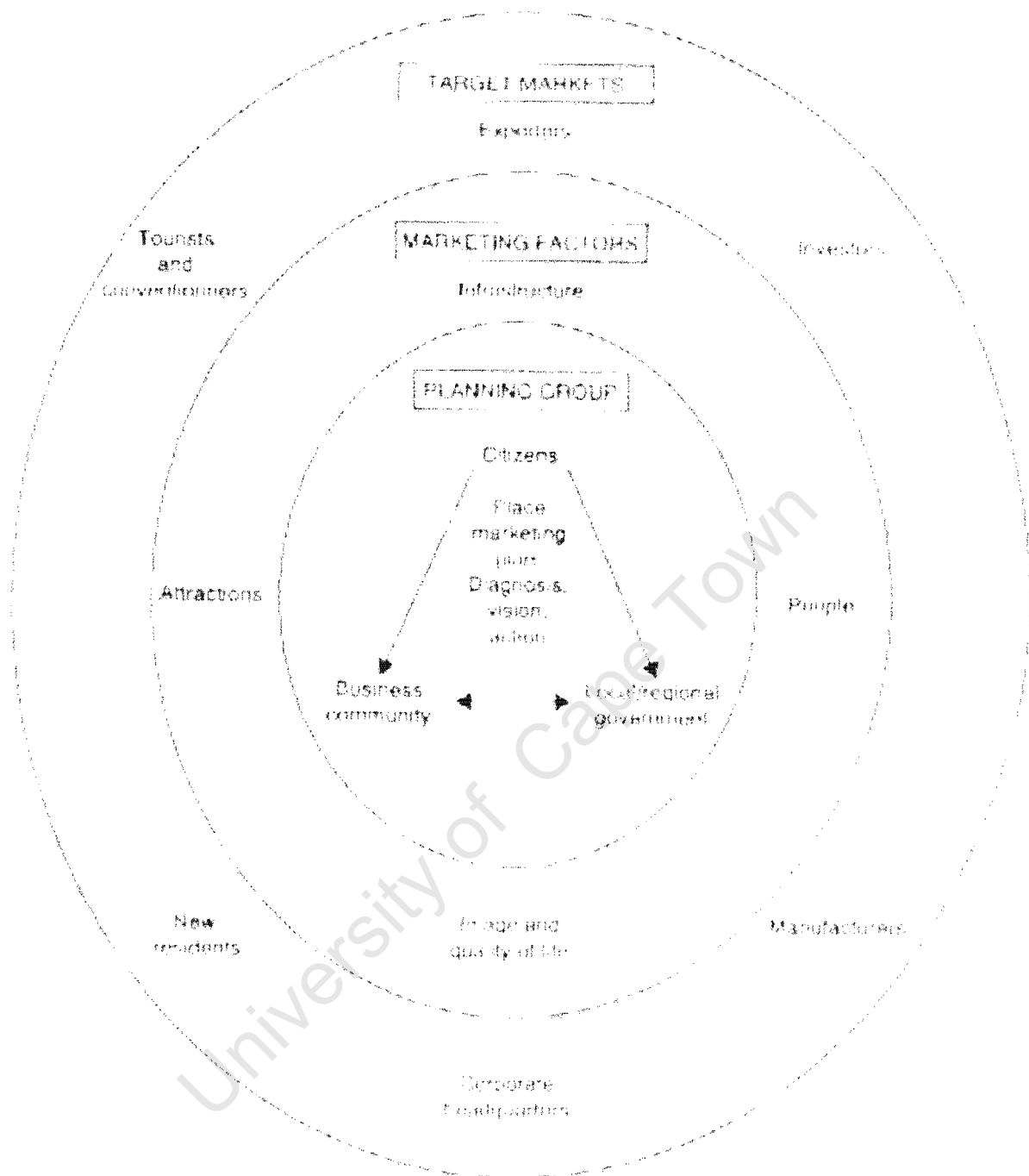
The greater Cape Town area is marketed by Cape Metropolitan Tourism (CMT) as a tourist destination while the Western Cape Investment and Trade Promotion Agency (WESGRO) is responsible for marketing the Western Cape as a place to invest. This will change shortly due to the current restructuring process happening in the industry that will change the locus of responsibility for each and every organisation involved in the marketing of Cape Town and the Western Cape. At present the roles and responsibilities of major players in the Western Cape tourism industry are not clearly defined. The challenge still remains to combine marketing efforts of all individual players to sell the region as a tourism and investment destination. Place marketing has been done on an ad-hoc basis with no clear idea of what is being marketed and how it must be marketed to promote economic growth within the province.

Place marketing can only succeed when stakeholders such as citizens, workers, and business firms derive satisfaction from their community, and when visitors, new businesses find their expectations met. The Joint Marketing Initiative was launched in April 2001 as a joint initiative by the Western Cape province and the city of Cape Town to focus and align the marketing efforts aimed at citizens, investors and tourists for the growth of the province. The goal is to develop a set of clearly defined objectives and strategies for each of the following markets namely tourism, investment, trade and export promotion, film and television, and event management. It is based on a partnership between the private and public sector to achieve long-term goals such as economic upliftment, job creation and better life for all Capetonians (JMI, 2001). The challenge remains to co-ordinate the marketing efforts of each of these sectors to convey the same message to international visitors and investors rather than promoting haphazardly.

Such an initiative is necessary because the resources, assets, and advantages that an area enjoy today may not be those that provide the same opportunities a decade from now. Therefore, place marketing requires first of all, an understanding of consumer needs and wants; translating these needs and wants into an attractive offer; marketing of the offer effectively which ultimately leads to a better life for all South Africans. The JMI will determine a common strategy for all sectors in order to direct priorities, spend and resources. It will determine the use of brand and sub-brands for the region while ensuring a seamless and consistent world-class service delivery. This process will be flexible enough to allow for innovation, creativity and entrepreneurship (JMI Summit, 2001). In essence the JMI is responsible for strategically co-ordinating the efforts of key players in an attempt to market the destination more effectively.

### **2.1.1 STRATEGIC PLACE MARKETING**

Strategic place marketing calls for designing a place's features and attributes in such a way that it satisfies the needs of its key constituencies. The long-term solution involves improving four major marketing factors found in every community namely image, attractions, infrastructure and people as shown in **Figure 2** below. The foundation of JMI rests on co-ordination of efforts of the business community, local/regional government and citizens. As such, it can be viewed as part of the planning group shown in **Figure 2**. In fact one of the main reasons behind JMI being instituted was a lack of common vision, strategy and branding among the various sectors leading to perceived fragmentation and duplication of marketing efforts by the various agencies marketing the destination. Marketing the province strategically using a common and unified approach is thus the ultimate goal of the JMI process.



Source: Kotler, Haider and Rein (1993)

**Figure 2: Levels of Place Marketing**

Increasingly places such as Cape Town and the Western Cape rely on four broad strategies to attract visitors and residents, build their industrial base, and increase exports. These strategies are image marketing,

attractions marketing, infrastructure marketing and people marketing (Kotler et al. 1993: 33). Under an image strategy, the objectives are to identify, develop, and disseminate a strong positive image of the place. This is often the least expensive of the four strategies since the place is not investing money in adding attractions or improving its infrastructure, but only communicating something about its present features to others. The cost and effectiveness of an image strategy depends on the place's current image and real attributes.

Improving the image is not enough to ensure a place's prosperity. The place needs special features to satisfy residents and attract tourists. Some places are fortunate to have natural attractions, historical buildings, world-renowned edifices such as Paris's Eiffel Tower amongst others while some places such as Singapore has very little of those. Although Singapore has very few natural attractions, it has an international reputation for safety and cleanliness, excellent infrastructure, its strategic location, political stability and excellent shopping facilities (Tyler, Guerrier and Robertson, 1998: 66). Yet other places have built convention centres and building waterfronts but they still cannot attract tourists and investors. Clearly their failure seems to be related to inefficient planning and misunderstanding of their target markets' needs.

The organisations responsible for marketing these places often ignore the turbulence reshaping the world economy. No systematic attempt is made to figure out how to fit the region competitively into its metropolitan, regional, national, or even global setting. It assumes that if a place is a 'good product', tourists will visit. It commits what marketers call 'the better mousetrap fallacy,' in assuming that if someone builds a better mousetrap, people will rush to buy it (Kotler et al. 1993: 73). Cape Town as a city faces a similar problem where there is no clear understanding on how the city should be marketed and positioned in relation to the Western Cape region and South Africa as a whole. The image has been tarnished over the years due to apartheid and more recently through government stance on HIV/AIDS and the political crisis in neighbouring Zimbabwe.

Moreover, neither image nor attractions can provide the whole answer to a place's development. They cannot compensate or cover up for place deficiencies. The real fundamentals have to do with infrastructure. A place needs to have the proper infrastructure in place to attract anyone. Proper infrastructure development is the basis of building a successful tourism industry. However, to gain a competitive edge, destinations must focus not only on infrastructure but also on everyone and everything that comes into

contact with the consumer. Flawless service delivery, which includes interactions with the host and quality of the destination experience, can only improve perception of a place as a holistic entity.

A place can possess a fine infrastructure and many attractions and yet be unsuccessful because of the way visitors perceive its people. The hospitality of residents can affect a place's attractiveness in a number of ways. Outsiders often carry an image of the people who live in a particular place. These images have a strong effect on whether outsiders want to deal with the community (Kotler et al, 1993: 135). The point is that a place's citizens are an important part of the product. Therefore the fourth marketing strategy is for the place to market its people, and this might take several forms. In selecting target markets, places must consider the perceived character of their people. Places need to encourage their citizens to be more friendly and considerate of visitors. Many places end up working on image first rather than getting the basics such as infrastructure right because of a lack of funds. This is really a bootstrapping approach and often fails. The place needs to repair its fundamentals and yet may not have the money to do it (Kotler et al., 1993: 40).

The four marketing factors, in the final analysis, affect the place's success in attracting and satisfying its five potential target markets: goods and service producers, corporate headquarters and regional offices, outside investment and export markets, tourism and hospitality business, and new residents as shown in **Figure 2**. The fortunes of a place depends in the final analysis on the collaboration of the public and private sectors – teamwork among governmental units, business firms, voluntary and civic associations, and marketing organisations. Place marketing requires the active support of public and private agencies, interest groups, and citizens. A place's potential depends not so much on a place's location, climate and natural resources as it does on its human skill, will, energy, values, and organisation.

## **2.2 DESTINATION MARKETING**

The fundamentals of destination marketing as an area of specialisation within tourism and leisure marketing stem from place marketing. While destination marketing focuses on the visitor (including both domestic and international tourists) as the main target group, place marketing is aimed at visitors, residents, investors and exporters. Place marketing in essence goes beyond the realm of tourism and leisure marketing to include marketing of a region to exporters and investors that are often the pillars of economic success of a region. With the concept of place marketing in mind, places can be viewed as destinations that are amalgams of tourism products and services, offering an integrated experience to consumers (Pearce, 1989; Buhalis, 2000).

However, a tourist's experience of a destination is not solely derived from the consumption of various travel services. The service itself and the physical environment in which the encounter takes place, plays a significant role in influencing the outcome and thus the consumer's experience of the service (Bitner, 1990).

Factor analytic work on international travel experience has described how tourists desire particular (novel-familiarity) experiences from the physical setting itself, as well as from the service infrastructure that supports their visit. Mo, Howard and Havitz (1993) suggest that the natural environment and infrastructure are important considerations to visitors when choosing a destination. Similarly, Gunn's (1988) model of the tourist system denotes the tourism product as a complex consumptive experience that results from a process where tourists use multiple travel services during the course of their visit. Each experience affecting visitors' perception of the destination. Smith (1994) acknowledges the role of such travel services in creating a product experience that can lead to 'outputs' such as positive word-of-mouth and repeat visits from tourists.

A destination can also be viewed as a perceptual concept, interpreted subjectively by consumers, depending on their travel itinerary, cultural background, purpose of visit, education level and past experience (Buhalis, 2000: 97). Murphy (1985) equates destinations with the market place where demand and supply characteristics jostle for attention and consumption. Tyler et al. (1998: 137) support this view and suggest that the way tourists and tourism industry use the spaces in and around a city, for example, have profound effects upon not only the tourism product but also the city itself, the way that the various functions of the city are perceived by its residents, the perceptions of the city by tourists and also the power relations between various users of the city.

## **2.2.1 DESTINATIONS AS PRODUCTS/SERVICES**

All the above pinpoint to the existence of a debate in the literature as to whether cities or regions can be treated as products/services that can be promoted and marketed. There is an inherent problem of defining and delimiting the product as suggested by Ashworth and Voogd (1990) and Kotler et al. (1993). The destination product may be diffuse, complex and vaguely defined. The city product for example, has an inherent dualism – consisting of the place as a holistic entity, and of the specific services, attributes and facilities that occur within the place that are multi-sold (Warnaby et al, 1997: 206). That is, the same physical space, and many of the facilities and attributes of that space, is sold simultaneously to different groups of customers for different purposes (Ashworth and Voogd, 1990). Therefore, the place marketer has potentially little control over the customers' experience of the destination product. This result in a unique

product for each person, leading to a situation whereby a destination may be marketed by the relevant agencies without any clear idea of the nature of what is being consumed (Warnaby et al. 1997: 206).

A place is inevitably only one component in a hierarchy of spatial scales. For example, Cape Town exists within local, regional and national contexts, which may not bear any relation to the jurisdictional boundaries of those agencies responsible for its marketing. As a result, there may be different opinions on how to define and market the 'product'. These inherent difficulties in defining the destination product has led Warnaby et al. (1997) to suggest that when consumers create their own 'product' from the range of services and experiences available at a destination, the primary role and responsibility of destination marketers is to facilitate the ability of consumers to create the bundle of benefits appropriate to their own needs and wants. The general ambience of a destination, for example, creates a 'sense of place' which influences the bundle of benefits sought. By creating the right ambience for the right target group, a place can significantly influence consumer's perception of the overall destination offer. Places are therefore products, whose identities and values must be designed and marketed (Kotler et al., 1993: 4). The city of London for example, has used strong and established icons to market a unified image on the global stage. Their strong tourism industry is built on a rich foundation of historical assets that are marketed consistently. It is therefore not so much what is used to market but more how it is marketed that defines a destination's identity on the global stage.

Murphy et al. (2000: 50) support the conceptualisation of a destination product as consisting of a set of core benefits (quality and value) that are delivered through a tourism infrastructure that can be managed directly and is influenced by environmental factors, some of which may be controlled by public policy. The tourist destination experience is a thread woven into the visitor's overall sense of the trip quality and value based on the service infrastructure, which in turn, is influenced by the destination environment. Murphy et al. (2000) indicate that a tourist destination needs to consider and integrate the above factors into its overall planning strategies, including physical and social planning, along with a stronger partnership with business concerns. This is becoming more evident as more cities are combining quality of life objectives with facilities and amenities that will appeal to both residents and tourists.

Thus, there is some general agreement in the literature on the definition of a destination. It certainly involves products and services that are combined together to create a unique experience for the visitor. However, the visitor has some degree of control over the various elements that will constitute the offer. Understanding the core product as well as the facilitating, supportive and augmented products for each

target market is of paramount importance to destination marketers. It assists in tailoring the tourism offer to the specific needs of visitors. Nonetheless, each destination must realise that they can only match certain types of demand and hence tourism marketers need to appreciate travel motivations in order to develop appropriate offerings and brand destinations for the right target markets. Travel motivations are the basics that govern destination choice. In addition, destination marketers should be aware not only of the needs and wants of the active demand but also of the potential markets they can attract.

## **2.2.2 DESTINATION CHOICE**

Tourism is a highly competitive industry and the message conveyed to potential visitors is one of increased choice. Many destinations in many countries are now available, a wider variety of holiday types are also available whilst travel, accommodation and timing arrangements are flexible enough to be tailored for the needs of individual customers. Given such choice between competing destinations, the potential visitor will favour those destinations that offer the fullest realisation of their expectations (Goodall and Ashworth, 1988: 2). Yet it is not an easy task to match or exceed visitor expectations. To do so, requires an understanding of travel motivations that lie at the heart of successful destination marketing. This is because tourism is a response to felt needs and acquired values. Once needs and/or values have been activated and applied to a holiday scenario, the generated motivation constitutes a major parameter in expectation formation. Expectations in turn determine performance perceptions of products and services as well as perceptions of experiences. Motivation thus impacts on tourist behaviour in choosing a destination and satisfaction derived from the consumption of the destination product (Gnoth, 1997: 283).

The literature suggests that there are basically two theoretical approaches to the study of decision making by tourists. The first one refers to the old concept of 'economic-rational man' where tourists' destination choices reflect their need to optimise benefits within the constraints of disposable time and money. In practice, however, destination choice involves a degree of uncertainty. Basic tourist conditions, like weather, real quality of services and attitude of hosts are unknown prior to the visit. The tourist can only hope that the perceived image that was acquired through the various sources of information is as close to reality as possible (Mansfeld, 1992: 401). The second theoretical approach to understanding destination choice revolves around what has been termed as the 'vacation sequence' (Mansfeld, 1992: 401). Basically the vacation sequence refers to the choice process used by consumers when involved with a non-routinised and high-involvement purchase. Many researchers have argued that this choice process is phased (Woodside and Lysonski, 1989; Um and Crompton, 1990; Mansfeld, 1992). There appears to be some agreement that the

selection of a vacation destination goes through three central core stages: development of an initial set of destinations that has traditionally been called the awareness set, a discarding of some of those destinations to form a smaller late consideration or evoked set, and a final destination selected from those in the late consideration set.

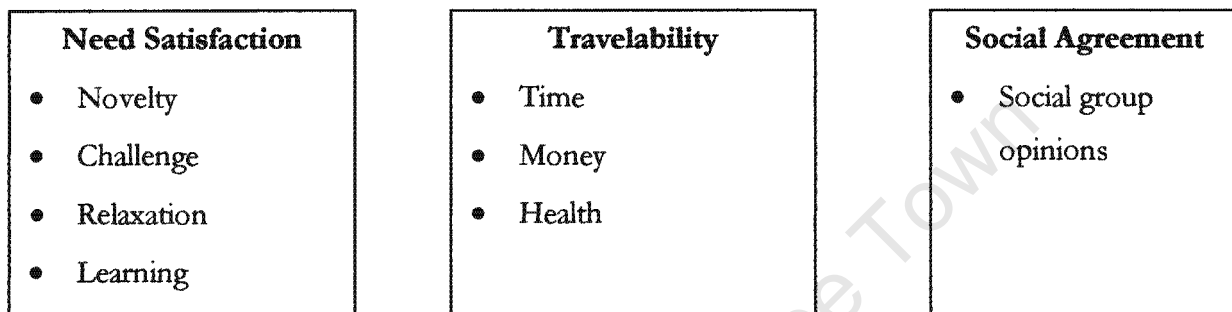
Thus it can already be deduced from the above that any model of destination choice will be complex in nature given that there are many stages that a traveller goes through before actually choosing a destination. A proposed model of destination choice by the author will comprise of a number of variables that will enter the model as the literature review suggests. There is no point in building a model of destination choice if the potential traveller is not even aware of South Africa or Cape Town as a destination. Therefore the model will focus on the evoked set and final destination selection as suggested by Um and Crompton (1990).

Crompton (1992: 424) defines the inert set as comprising of destinations that individuals are aware of, but towards which they are disinterested. They have neither a positive nor a negative predisposition toward these destinations, and the lack of affect causes them to be excluded from the initial consideration set. The reject or inept set is comprised of destinations that have been rejected from purchase consideration because they are perceived negatively. The negative perception may be the result of either an unpleasant experience or negative feedback from external sources. South Africa as a destination tends to be part of tourists' inert and inept sets. Woodside and Lysonski (1989: 12) in their study found that a substantial proportion of their ninety-two respondents for their research viewed South Africa as part of their unavailable-aware (34%) and inept set (22%). Destination choice therefore depends to a large extent on the positiveness or negativeness of perceptions of potential visitors towards a particular destination (Seddighi et al., 2001: 182). With South Africa being viewed negatively in the international market place, the likelihood of the destination being chosen for holiday purposes is low.

Factors such as need satisfaction, social agreement and travelability also impact on the destination choice process. The need satisfaction dimension of destination choice incorporates a set of motivations for travel that includes novelty, challenge, relaxation, learning, and curiosity. The social agreement dimension reflects potential travellers' inclinations to act in accordance with their social groups' opinions. The travelability dimension describes an individual's capability to travel to a place in terms of variables such as time, money, skill and health (Um and Crompton, 1992: 20). As with consumer buying behaviour, destination selection is also a complex task. To understand the factors involved in choosing a destination is not easy as consumers

can have different criteria for each destination chosen. For example, the need for relaxation will influence consumers to choose a destination that offers tranquillity and serenity while the same consumer will choose an adventure packed destination if he feels the need for excitement. Interestingly some consumers seem to have no rationale for choosing a destination. They based their choice on the 'unpredictability' or element of surprise on arrival at the destination. Mazursky (1989: 335) states that the unpredictability of tourism events lie at the heart of vacation experience. Visitors seem to increasingly choose destination based on their 'gut feeling'.

Therefore a model of destination choice will be influenced by the following three factors:



The extent to which each of these factors will influence the final choice of a destination will be dependent on the destinations that have been selected to be part of the evoked set that are themselves influenced by the above mentioned factors. The final choice rests upon the level of importance that the customer attaches to each of these three factors. For example, the need for novelty will lead to the choice of a destination that offers unconventional experiences.

In addition potential tourists frequently have limited knowledge about a destination that they have not previously visited. This knowledge often is confined to symbolic information acquired either from media or from their social group. Therefore it is important to discuss the role played by travel information in the destination choice process and the impact of travel information on tourists' actual destination choice. In most decision-making processes, the information collection takes place before probable decision alternatives have been established. The process of gathering information in order to choose a destination proceeds in two phases. In the first phase, the individual gathers enough information to ascertain that attractive destinations offered or chosen are within constraint limits (disposable income, time and family situation). In the second phase, information is collected in order to enable the potential tourist to evaluate each alternative on a 'place-utility' rather than on a constraint basis (Mansfeld, 1992: 406). However, it must be noted that

consumers 'buy' a holiday based not so much upon what information is actually presented to them but more on how they perceive that information.

The available tourist information emanates from two types of sources namely formal and informal. Formal sources of information refer to information gathered from travel agents, brochures, guidebooks and maps. Informal sources of information are the recommendations and impressions of other people such as family and friends based on their own past travel experiences. From the sources of information, tourists formulate images of the destination, so image emerges as a critical element in the destination choice process. For this reason, a substantial number of studies concerned with destination choice have focused on identifying the dominant attributes of destination image and exploring their role in the selection of a travel destination (Um and Crompton, 1992: 18). Destination image is such a vital component in destination selection that it warrants treatment on its own and is dealt with in **section 2.4**. Goodall and Ashworth (1988: 9) are of the opinion that where prices are comparable, image is the decisive factor in destination choice. Mansfeld (1992) went further to say that at the root of every destination choice is the assignment of utility values to various parts of the decision alternative. These parts are referred to as destination attributes. The more attributes representing high utility values exist in a particular alternative, the more likely it is that this alternative will be chosen as the preferred one. It can therefore be concluded that a model of destination choice will have to include destination image as a vital component given that it influences the choice process. Already it can be seen that formal and informal sources of information affect the perceived image of a destination. This issue will be discussed further at a later stage.

At any given time a person has a set of accumulated images about a great number of holiday experiences, some personal but many second-hand. These images, for each person, will be modified and added to with each additional experience and by further exposure to a variety of information sources. The implications for tourist destinations are threefold. First, a destination has no chance of being selected for holiday purposes unless it figures amongst a potential visitor's current set of mental images. Second, where the destination does figure in the current set of images held by the potential tourist, this image must be a positive one in order to be selected in preference to an alternative. Third, where the tourist is successfully enticed to a destination it is equally important that the satisfaction derived from the destination experience at least matches expectations created by the image. Otherwise the tourist is unlikely to revisit or recommend the destination to others. Indeed the dissatisfied tourist may contribute towards dissemination of a negative

image of the destination. Personal images can therefore be influenced, manipulated and even created to position a destination favourably in consumers' minds (Goodall and Ashworth, 1988: 10).

Ashworth and Goodall (1990) went on further to add that destinations are chosen based in terms of their basic destination attributes followed by imagery processing. The alternatives that remain are then compared for compatibility with self-image. The process of choosing a destination based on its attributes has been termed as 'discursive processing'. Discursive and imagery evaluations of destination images correspond to the evaluation of physical and sentimental components of a place. Discursive evaluation assesses the 'identity and structure' components of a place image while imagery evaluation assesses the 'meaning' component of place image (Ashworth and Goodall, 1990: 49). In essence, the main goal of destination marketing is therefore to create a rich visual imagery of a place. The city of London has been particularly good at creating a rich visual imagery of the place. Combinations of attractions that have historical appeal such as London Bridge, Buckingham Palace, Big Ben and Victoria Station have been marketed simultaneously with new attractions such as the Millennium Dome. A similar approach can be used to market Cape Town where historical assets such as Robben Island and Bo-Kaap must be marketed in conjunction with the new convention centre and Canal Walk. These create a rich imagery of the destination that offers a diversity of experiences.

Thus, a destination choice decision may be conceptualised as emerging from the interaction of an individual's beliefs about a destination's attributes with his or her motives for pleasure travel and situational factors. Those beliefs about a destination's attributes which help to satisfy a potential visitor's specific motives are termed as 'facilitators', whereas those attributes which are not congruent with his or her motives are termed 'inhibitors'. Perceived inhibitors and facilitators are operationalised as consisting of two components:

- The extent to which prospective destinations are believed to possess certain attributes
- The relative strength or intensity of beliefs about each attribute as either an inhibitor or a facilitator in evaluating each place as a possible destination.

Therefore, a choice of whether an alternative is selected as a travel destination may be expressed as a function of the interaction of perceived facilitators and perceived inhibitors (Um and Compton, 1992: 19).

## 2.2.3 DESTINATION MIX

Both perceived destination facilitators and inhibitors have a significant impact on the destination experience. Destination attributes (facilitators and inhibitors) form part of the destination mix. Destination mix components can be regarded as the supply side of the tourism system. Most destinations comprise a core of the following components that is usually referred to as the six A's framework:

1. **Attractions** (natural, man-made, artificial, purpose built, heritage, special events)
2. **Accessibility** (entire transportation system comprising of routes, terminals and vehicles)
3. **Amenities** (accommodation and catering facilities, retailing, and other tourist services)
4. **Available packages** (pre-arranged packages by intermediaries and principals)
5. **Activities** (all activities available at the destination and what consumers will do during their visit)
6. **Ancillary services** (services used by tourists such as banks, telecommunications, post, newsagents, hospitals etc.) (Buhalis, 2000: 98)

Therefore the destination mix can be regarded as a combination of products and services offered to the visitor. It can even be considered as a brand of all products, services and ultimately experiences provided locally. As with all other mixes such as the marketing mix and promotions mix, the components are interdependent; all components must be present to produce a satisfying holiday experience. However, unlike other mixes the destination marketer has little control over the components (George, 2001: 291). The components of the destination mix enable marketers to assess the impact of tourism as well as manage demand and supply in order to maximise benefits for all stakeholders. Ryan (1991b) explains that companies and governments often apply only part of the marketing mix (promotion) and tend to overlook the complex relationship between the destination mix and the marketing mix. Little attention being paid to create synergies between the two.

## 2.2.4 CHALLENGES FACING DESTINATION MARKETING ORGANISATIONS (DMOs)

Often destinations are artificially divided by geographical and political barriers, which fail to take into consideration consumer preferences or tourism industry functions. An example of that is the Alps shared by France, Austria, Switzerland, and Italy is often perceived and consumed as part of the same product by skiers (Buhalis, 2000: 97). Destinations historically have been defined as geographical areas such as a country, island or town. However, with globalisation this definition is outdated. Today, for example,

London can be the destination of South African tourists, whilst Europe may be the destination for a Japanese tourist who packs six European countries in a two-week tour. The interpretation of the definition of a destination is subjective. Destination marketing is complex because:

- Destinations exist at a number of different geographical levels.
- The organisations marketing destinations have no direct control over the product.
- No direct charge is made for visiting the destination. Consumers pay to use the individual components of the destination product but not for the destination itself. This fact is at the root of one of the most controversial aspects of destination marketing. The whole community through taxes paid to public sector bodies funds most destination marketing, yet most of the economic benefits go to the private sector enterprises, while the consumer rarely pays the true cost of their visit. This is clearly a moral dilemma (Horner and Swarbrooke, 1996: 300).

Yet co-operation between private and public sector bodies is critical for the success of a destination. The failure of the recent 'Cool Britannia' campaign to market the UK is an example of lack of synergy between private and public bodies marketing London as a destination. Thereafter London initiated a number of initiatives funded by the public sector but driven by private sector to enhance the appeal of London as a destination. Similarly the repositioning of San Francisco as a unique and energised city with a stylish image and status different from the laid-back and cosmetic California was driven by public and private sector co-operation (AVG, 2002). The same approach has been envisioned to market Cape Town. The JMI process is funded by provincial government and driven partly by private sector

Therefore, the main challenges facing destination marketing organisations is how to co-ordinate their efforts with that of other organisations which are responsible for the marketing of different geographical entities that encompass but are not solely concerned with their area. It is common practice that destination marketing is carried out by public sector bodies rather than private companies. Destinations are some of the most difficult entities to market and manage, due to their complexity of the relationships with local stakeholders. Managing and marketing destinations is also challenging because of the variety of stakeholders involved in the development and production of the tourism product. The destination experience is essentially comprised of regions, resources and amalgams of tourist services and facilities that often do not belong to individuals. Instead, they represent a collection of both professional and personal interests of all people who live and work in the area. Managing conflicting interests are often a large part of the challenge. Further to this, regional and local tourism boards are often heavily dependent on each other and their

commercial members for funding. Attraction owners, accommodation providers and smaller districts within a region, all want as much profile as possible for their products. The problem is that this orientation may not necessarily correspond to the needs of the consumer (Alford, 1998: 58).

Also, public bodies have a vested financial interest in tourism for themselves as it helps them to earn income from tourism in a number of ways. For example, a government gains revenue from value-added taxes while local authorities gain from the charges paid by tourists to visit publicly-owned tourist attractions (Horner and Swarbrooke, 1996: 299). Tourism can help justify and fund infrastructure development such as new roads and airports, which benefits local residents.. Cape Metropolitan Tourism is a good example of a public body responsible for marketing the greater Cape Town area. It has set its priority as being tourism development in the area to create more jobs and to bring the previously disadvantaged communities in the mainstream economy.

Moreover, the diverse nature of the tourism industry has meant that tourism planning has been difficult to define and grasp conceptually and, therefore, co-ordination of the various elements of the tourism product has been extremely difficult to achieve. Yet, it is the very nature of the industry, particularly the way in which local communities, their culture and lifestyles and the environment are part of the tourism product, which makes planning so important. As Gunn (1993) observed, because of the fragmented growth of the tourism industry, *'the overall planning of the total tourism system is long overdue...there is no overall policy, philosophy or co-ordinating force that brings together the many pieces of tourism in harmony and assures their continued harmonious function'*. The lack of a concrete framework and clearly defined responsibilities are often the main reasons why a particular destination is unable to attract a significant amount of visitors despite its good product offering. The perceived fragmentation of marketing efforts has been the central debate surrounding Cape Town's inability to sustain high tourism growth rates. The White Paper on sustainable tourism in the Western Cape acknowledges the perceived fragmentation of effort in the industry which has resulted in *'ad-hoc and fragmented strategies which failed to capitalise on the diverse tourism resources thereby limiting the ability of the tourism sector to effectively provide much needed entrepreneurship, employment and skills development opportunities'* (2000: 3). The importance of greater co-ordination between the various agencies responsible for marketing the province is thus magnified in the White Paper.

Perhaps the most difficult problem in destination marketing is to ensure the rational use of the zero-priced public goods such as landscapes, mountains and the sea (Buhalis, 2000; Buhalis and Fletcher, 1995) and yet

tourists perceive the destination as a brand comprising of a collection of suppliers and services. Before visiting they develop an image about destinations as well as a set of expectations based on previous experience, word-of-mouth, press releases etc. during their holiday they consume destinations as a comprehensive experience, without often realising that each element of the product is produced and managed by individual players. As a result, there is much overlap between strategic marketing of the destination as a whole and each of the individual supplier goals. Hence the competitiveness of each player is often interrelated and almost indistinguishable from one another (Buhalis, 2000: 99).

When a product is made up of components contributed by different suppliers, quality control becomes a critical issue to ensure consistency in performance. The same applies to destinations, controlling the destination experience is of paramount importance to keep customers satisfied. Tourism policy is the most often used method of controlling various aspects of the offering. The accommodation sector for example, usually grades and classifies hospitality establishments based on the quality of service provided. Tourism policy seeks primarily to create an environment within which tourism can flourish in an adaptive sustainable manner (Buhalis, 2000: 99).

Tourism policy should be formulated based on the interests and benefits of all stakeholders. Failure to do so jeopardises relationships between stakeholders and threatens the achievement of strategic objectives and the long-term competitiveness and prosperity of destinations. Equally important is the emphasis on formulating destination development strategies through a publicly driven process based on stakeholders' values and consensus, rather than through a more private 'expert-driven' process based solely on market forces (Buhalis, 2000: 99). Destination marketing should operate as a mechanism to facilitate regional development objectives and to rationalise the provision of tourism in order to ensure that the strategic objectives of the destination are achieved. It should ensure equitable return on resources utilised for the production and delivery of tourism products as well as the regeneration of these resources. It should also provide suitable gains to all stakeholders involved in the tourism system. Hence marketing should be used as a strategic mechanism in co-ordination with planning and management rather than as a sales tool (Buhalis, 2000: 100).

Thus, the marketing of destinations should balance the strategic objectives of all stakeholders as well as the sustainability of local resources. Successful destinations will be those that are able to bring all individual partners together to co-operate rather than compete and to pool resources towards developing an integrated marketing mix and delivery system (Buhalis and Cooper, 1998). The challenge still remains for players in the

Cape Town tourism industry to pool their resources and efforts together to market the region and to focus on co-operation and benefit sharing rather than internal competition. Not to say that internal competition is unnecessary though, competition makes individual suppliers more efficient at satisfying customer needs. However, given the high level of fragmentation in the tourism industry in Cape Town, co-operation should be the focus at this point in time to create a distinct image and brand. Destinations need to differentiate their products and develop partnerships between the public and private sector locally in order to co-ordinate delivery. Taking advantage of new technologies and the Internet will enable destinations to enhance their competitiveness by increasing their visibility, reducing costs and enhancing local co-operation (Buhalis, 2000: 97).

An additional complication is that most destinations have already a rich history, image and legacy development, which need to be taken into consideration when developing destination marketing strategies. This has been particularly a challenge for destinations such as London and Cape Town. On the one hand, London is renowned for its tradition and culture amplified through icons such as the Royal Family and Westminster Abbey. Yet to position London as a millennium city with symbols of a dawning new era is not an easy task. In the same way, the current image of Cape Town is one of a city coming out of a legacy of apartheid with rich historical significance and cultural diversity. On the other hand the city offers a cosmopolitan experience with attractions such as the V&A Waterfront and Canal Walk. The difficulty in marketing these often contradictory images of a destination adds to the complexity of destination marketing. Not only consumers develop certain images and views about places, but also previous marketing campaigns provide several limits on current campaigns. Understanding the stage and roots of tourism development is therefore critical for development of a strategy that is supported by all stakeholders (Buhalis, 2000: 104).

## **2.3 STRATEGIC DESTINATION MARKETING**

Cooper et al. (1998) define destinations as the focus of facilities and services designed to meet the needs of the tourists. The destination itself is influenced by six environmental factors that shape the destination: demographic, economic, natural, technological, political and cultural forces, which impinge upon the visitor experience and sense of the destination as suggested by Kotler, Bowen and Makens (1996). Physical elements of the destination can include features like a site or facility, natural resources such a scenic beauty, flora, fauna, or physical conditions such as the weather. Social factors like friendliness of local people, language spoken, family structures, occupations, urban layout and population density, are also attributes of

the destination. The level, use, or lack of infrastructure and technology in a destination are also visible features of developed and under-developed tourism products that can influence visitor's trip experience. The economic conditions and structural features that characterise a country, such as currency exchange, market behaviour and pricing, are further attributes that factor into the traveller's experience of the destination. Culture is an important factor shaping many tourist experiences. Authentic local culture, its history, institutions and customs can provide a rich experiential tapestry for the visiting tourists (Murphy et al, 2000: 45). Furthermore, government control, responsiveness to tourism, and the treatment of tourists, for example, visa applications, ports of entry can also affect the destination environment that tourists experience.

These factors in aggregate influence the choice of a particular strategy for a destination. Middleton (1988) believes that destination marketing organisations have two strategic alternatives. Firstly, they can concentrate their budget on creating tourist motivations and attitudes through image campaigns. The second alternative is to follow a strategy of facilitating and influencing suppliers of tourism products. He firmly believes, given limited public sector budget that the latter course will produce more tangible results. These strategies relate to the push and pull strategies suggested by Lubbe (1998). These strategies will be considered in more detail in **section 2.4.2**. Butler (1980), Gilbert (1990), Porter (1985), and Poon (1993) have suggested different strategic alternatives for destinations based on their own framework.

### **2.3.1 BUTLER'S DESTINATION LIFE CYCLE MODEL**

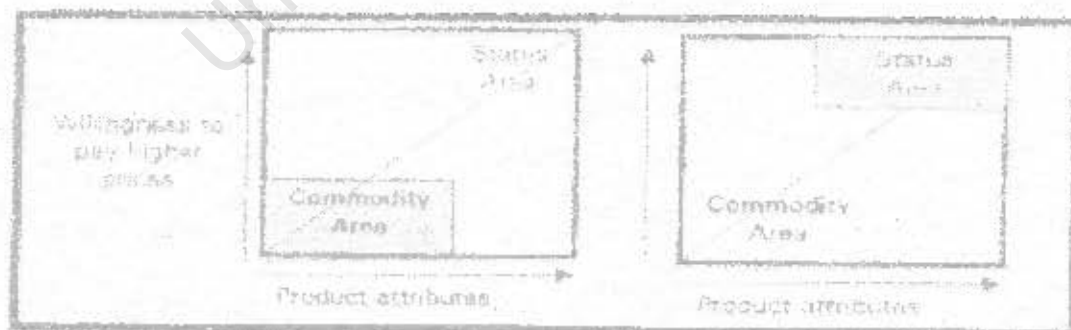
One of the most widely used tools for undertaking the task of identifying appropriate strategies for a destination is the destination life cycle model (Butler, 1980). The main utility of this model is to facilitate the understanding of the evolution of tourist products and destinations and this provides guidance for strategic decision taking. According to Butler, a destination will experience a period of slow growth, followed— if marketed properly— by a take off period of rapid growth, and subsequently a period of stability. If improvements to the destination are not made, the appeal of the destination will thereafter decline, as sales will fall. Eventually the destination may have to be de-marketed (George, 2001: 297). The model highlights that different stages of the life cycle require different marketing strategies and planning actions as shown in **Appendix A**. This is largely due to the differences between demand and supply experienced at different levels. In the early stages, demand exceeds supply whilst this relationship is reversed in the maturity and consolidation phases. As a result, marketing strategies should focus on building awareness and promoting the destination product in the early stages of the cycle while at later stages, image alteration and redesign and

relaunch become a priority (Buhalis, 2000: 104). Destinations such as London, San Francisco, Florida and Hong Kong are considered to be in their maturity stage of their destination life cycle. These destinations have been involved in tourism for more than two decades and their priority is to reposition and relaunch the destination. Cape Town on the other hand, is perceived to be in its introduction phase of its life cycle in some markets for example, the MICE market where building awareness is a priority. In other markets, Cape Town is in its maturity stage where relaunch becomes a priority. The entire destination mix will have to be altered and differentiated to accommodate the needs of the city at each stage of its life cycle.

However, the main problems relate to identifying turning points, stages, length of stages and level of aggregation. Applying the destination life cycle to the whole destination can be misleading, as a particular niche market within the destination might be declining while another area is flourishing. The concept is useful as a diagnostic tool, not as a predictive tool. The model assumes that destinations progress from one stage to another. In reality, this is not always the case, destinations may reach a particular stage in a far shorter time (George, 2001). It is quite difficult to pinpoint whether a destination is in its growth or maturity stage of its destination life cycle given the diversity of tourism products offered. Some niche-market products in Cape Town such as whale watching, gay tourism etc. are still in the introduction phase of their respective life cycles while other markets such as shopping, VFR market etc. have matured, requiring different strategies.

### 2.3.2 GILBERT'S STRATEGIC FRAMEWORK

Gilbert (1984, 1990) argues that destinations can be classified on a continuum between a 'status' and a 'commodity' area, as illustrated in **Figure 3**.



Source: Buhalis (2000)

**Figure 3:** Gilbert's Differentiation Strategy

'Status areas' achieve international demand as a result of the unique attributes that the product is made of, as perceived by the target markets. These unique attributes may be real or imagined and thus, a destination is regarded as irreplaceable. Consequently, consumers' loyalty and willingness to pay a premium price for the destination increase. In the 'commodity status' case, destinations are substitutable, demand is very sensitive to price and economic changes, while consumers have a low awareness of any unique benefits and attributes. Thus, travellers base their decision to visit the area merely on price, while demand for the destination is incidental and destinations are unable to attract high spenders (Buhalis, 2000: 107). Despite the fact that the sustainability of resources is not discussed explicitly by the model, it is quite evident that 'status areas' manage their resources as product attributes and therefore are appreciated by consumers who are willing to pay more. Gilbert (1990) affirms that destinations should attempt to become 'status areas' rather than 'commodity areas' in order to improve their image, loyalty and economic benefits. Although the model clearly assigns destinations to distinctive categories, it fails to recognise that the majority of destinations such as South Africa, Malaysia, Egypt etc. lay between the two ends of the continuum. It also fails to relate to the different stages of the life cycle and to the inevitability experienced in several regions where destinations are launched as status area and gradually slip to commodity area. Nevertheless, the model clearly contributes to tourism by correlating product attributes with willingness to pay and also by illustrating clearly that destinations should decide on what direction they should plan and manage their resources and facilities.

### **2.3.3 PORTER'S GENERIC STRATEGIES**

Porter (1985) proposed three generic strategies namely: overall cost leadership, differentiation and focused differentiation, to outperform other firms in an industry. In a destination marketing context, an overall cost leadership strategy will be one where destination marketing organisations focus on providing good value for money at lowest costs based on mass production and strict cost control of the main business functions. This strategy seems to favour mass tourism where the experience is standardised irrespective of visitors' needs and wants. A differentiation strategy centres on products and services (destination attributes) offered. The aim is to create an experience that is perceived by visitors as being unique. The focus differentiation strategy identifies a particular buyer group or segment and achieves either cost leadership or product differentiation. This model provides clear guidance for decision-makers to position their products in order to maximise profitability and improve their competitiveness. However, this model fails to address the specific needs of tourism and in particular the scarcity of resources at the destination level (Buhalis, 2000). The model fails to

recognise that currency fluctuations significantly affect value for money perceptions. The competitiveness of tourism lies in a differentiated product that creates a unique experience for each customer.

### **2.3.4 POON'S FLEXIBLE SPECIALISATION**

A fourth strategic approach is proposed by Poon (1989, 1993) based on the concept of 'flexible specialisation' of the tourism business. Poon argues that flexible specialisation is a strategy of permanent innovation and ceaseless change, which provides for 'new tourism'. New tourism is flexible, segmented, customised to the tourists needs and diagonally integrated. In contrast, old tourism can be characterised as 'mass, standardised, and rigidly packaged'. The main sources of flexibility for service firms lie in the organisation, management, marketing, distribution and other forms of interaction and interrelationships among guests, hotels, suppliers etc. What is of importance, however, is not each of these stand-alone aspects but how they are combined together to create competitive advantages and hence, capabilities to move with the market. This is a timely model that predicts the impact of information technology on both decision-making and consumer behaviour. Industry innovation is critical in this strategy and the utilisation of new technology provides the opportunity to customise products according to customer's specific requirements. Hence destinations can organise their assets and attributes in such a way that it enables them to specialise their tourism product according to particular demand needs. Although Poon's model revolutionised tourism thinking it is still difficult to implement at the destination level. The majority of infrastructure and superstructure is based on fixed assets, which cannot be altered easily and therefore have a limited degree of flexibility. This is more evident for destinations at the consolidation stages, which are unable to reinvent themselves and approach new markets. Nevertheless, the model clearly contributes to the field by encouraging tourism organisations and destinations to challenge existing strategies and practices thus forcing them to adopt new approaches to tourism product development with new tools introduced by technology. Concentration on core functions and outsourcing all peripheral activities to networks of virtual co-operation should enable destinations and enterprises to innovate and to adapt to the needs of consumers constantly (Buhalis, 2000: 107).

A close examination of the strategies prescribed by the above three models seems to reveal that they share a similar base. Porter's differentiation, Gilbert's status area and Poon's flexible specialisation describe how firms and destinations can achieve value-competitive advantages. Consumers value special attributes and as a result they are prepared to pay higher prices, inclined to visit areas more regularly, and increase their loyalty. In contrast, cost leadership, commodity area and standardisation describe the efforts of firms or

destinations to achieve cost competitive advantages by offering their products for less than their competitors. This is achieved through economies of scale, standardisation and mass production. Hence the underlying concept of the two alternative set of strategies is the relationship between volume and price. The first set of strategies support a low-volume, high-profit margin approach, where each consumer is paying premium prices for unique products while the second set of strategies follow a high-volume, low-profit margin approach. Tourism destinations should therefore avoid the cost advantage strategies as they are based on mass production and consumption and assume unlimited production capacity and resources. Gilbert and Poon's strategic frameworks tend to suggest that destinations should follow a niche orientation through differentiation in order to increase consumer satisfaction as well as to maximise benefits. However, such strategies should not be served as an excuse for not improving efficiency and minimising production costs. Although providing a unique service to satisfy tourist needs should be a priority, offering perceived value for money would determine their competitiveness in the market place (Morgan and Pritchard, 1998). Besides value for money, there are a number of other factors that determine the competitiveness of a destination, one of which is destination image. The following section deals with image as a construct followed by destination image, its importance in destination choice and consumer behaviour.

## **2.4 DESTINATION IMAGE**

### **2.4.1 IMAGE AS A CONSTRUCT**

Image is a widely researched construct in various fields and more specifically in the marketing field where product image, store image and company image have been viewed as the critical elements in the positioning and success of products, services and companies. According to Barich and Kotler (1991: 95), image is defined as the sum of beliefs, attitudes, and impressions that a person or group has of an object. The object may be a company, product, brand, place or person. The impressions may be true or false, real or imagined (1991: 92). Similarly, Fridgen (1987) defines image as a mental representation of an object or place, which is not physically before the observer. Ahmed (1996: 44) suggests that image is an internalised, conceptualised and personalised understanding of what one knows. He propounded a theory of human behaviour based upon the concept of image. The theory states that behaviour is primarily affected by image. Consumers are assumed to behave in accordance with what they know, what they think they know, and what they think they ought to know.

Therefore images form part of consumers' decision-making processes in that they will influence the choices they make. Consequently, the choice of a destination will be affected by destination image. Understanding the destination image formation and choice process is critical for the development of the author's proposed model. Thus, the following discussions centre on destination image and its importance in destination choice. Basic psychological, physical, cultural, social and economic motivators govern behaviour and these are conditioned by experiences, information and individual preferences to create images of reality. Hence, consumer behaviour stems from consumer images (Ahmed, 1996: 45). Right or wrong, images guide and shape behaviour, influence attitudes, affect predispositions as consumers, and tend to change slowly. Tourism destination marketers seek to establish, reinforce or change image. Their goal is to match to the greatest extent possible the promoted and perceived image (Kotler et al., 1993). An image not only presents the product (destination) but can also communicate its attributes, characteristics, concepts, values and ideas (MacKay and Fesenmaier, 1997: 538). The implications and impact of image can affect tourists through the creation of expectations and the desire for image verification. Thus image is subjective knowledge and a consumptive experience. Portrayal of natural scenery, for example, may imply experiencing nature or portrayal of landmarks and historic sites may indicate heritage appreciation.

Strategic image management (SIM) emerged as an ongoing process of researching a place's image among its audiences, segmenting and targeting its specific image and its demographic audiences, positioning the place's benefits to support an existing image or create a new image, and communicating those benefits to the target audiences (Kotler et al. 1993: 143). Strategic Image Management is founded on the belief that for an image to be effective, it must meet the following criteria:

- It must be **valid**. If a place promotes an image too far from reality, the chance of success is minimal.
- It must be **believable**. Even if the proposed image is valid, it may not be readily believable.
- It must be **simple**. If a place disseminates too many images of itself, it leads to confusion.
- It must have **appeal**. The image must suggest why people would want to live there, visit, invest and so forth.
- It must be **distinctive**. The image works best when it is different from other common themes. There is an overuse of the words 'a friendly place,' and 'a place that works' (Kotler et al. 1993: 150).

Researchers in several disciplines and fields agree that the image construct has both perceptual/cognitive and affective evaluations (Holbrook 1978; Gartner 1993; Baloglu and Brinberg 1997; Baloglu and McCleary,

1999). The perceptual/cognitive evaluations refer to the beliefs or knowledge about a destination's attributes and are formed by external factors which include various sources of information such as symbolic stimuli (promotional effort of a destination) and social stimuli (word of mouth) (Baloglu and McCleary, 1999: 148). Affective evaluations on the other hand, refer to feelings toward, or attachment to the object or destination. Several authors suggested that motivations are related to the affective component of image and an individual's affective image toward a destination is, to a great extent, influenced by his/her motivations (benefits sought) from the touristic experience (Vaughan and Edwards, 1999; Lubbe, 1998; Baloglu and Brinberg, 1997). These affective evaluations are formed in a conscious or unconscious way. Mayo and Jarvis (1981) indicated that tourist's psychological motivations influence their images of destinations. They determine the image of a destination before and after visitation. Thus an important component of the author's proposed model should be psychological motivations that influence image.

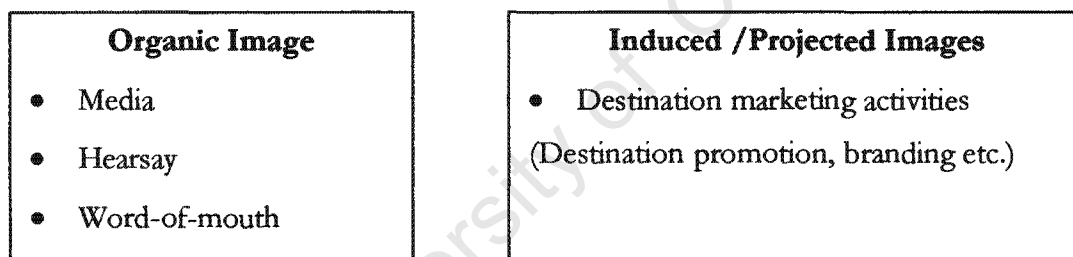
Affective evaluations have been measured by Baloglu and McCleary using four bipolar scales namely: arousing-sleepy, pleasant-unpleasant, exciting-gloomy and relaxing-distressing (1999: 150). Holbrook (1978) and Gartner (1993) noted that the type and amount of external stimuli received influence the formation of the cognitive component of image but not the affective counterpart. In fact, Burgess (1978) hypothesised that the type, quality, and quantity of information would determine the type of image that is likely to develop. Thus the cognitive component of image plays an intervening role between information sources and the affective component. The cognitive and affective components of destination image are therefore distinct but hierarchically related when tourists choose a destination (Gartner, 1993).

Holbrook (1978: 547) argues that the basic distinction between cognitive and affective components has been presented in a wide range of disciplines through the use of labels such as referential versus emotive meaning, designative versus appraisive meaning, formalist versus expressivist meaning, cognitive versus affective meaning, and denotative versus connotative meaning. Holbrook (1978) adds that in marketing and consumer behaviour those two components are treated under the label of beliefs versus affect. There is general agreement among tourism researchers that the image of a destination is therefore dependent on the cognitive evaluations of the place and the affective responses are formed as a function of the cognitive responses. An overall or composite image of a place is formed as a result of the interaction between both the perceptual/cognitive and the affective evaluations of that place (Baloglu and McCleary 1999; Gartner 1993). Ahmed (1991) notes that the relationship between overall image and other components of destination marketing will create favourable or unfavourable perceptions about the destination.

## 2.4.2 THE DESTINATION IMAGE FORMATION PROCESS

Probably the best-known description of destination image is that of Gunn (1972) who stated that destination image evolves at two levels to give an organic and an induced/projected image. The organic image is formed from an early age and based on what is learnt of a country while induced image is the result of promotion of that country as a tourist destination (Lubbe, 1998). Research by Andreu et al. (2000: 53) on the perceived image of Spain as a holiday destination showed that personalised stimuli (previous experiences and word-of-mouth) were the most important sources of information for selecting a destination. This confirms the significance of sources that are not directly controlled by tourist destination organisations in influencing destination choice. The principal difference between organic and induced images is the absence or presence of control over the destination by the developers. Protagonists for the construction of the projected image are tourism information offices, tour operators and travel agencies (Kotler et al., 1993; Pritchard, 1998). Together with this projected image, the identification of the image perceived by the tourist is fundamental in determining a destination's competitiveness.

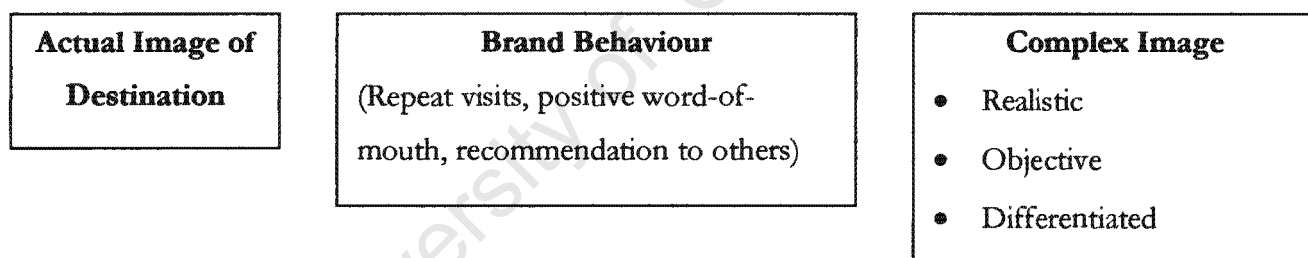
Hence the author's proposed model of destination image and choice process will include the following components:



These affect the choice of a destination and as stated by Gunn (1972), Lubbe (1998) and Andreu et al. (2000), a marketer has very little control over the organic image of a destination. Therefore managing the projected images becomes critical to ensure the success of the destination. Destination promotion, pricing and branding will influence the choice of a destination to the extent that the projected image of the destination is in line with consumers' expectations.

Place image studies are an effective vehicle for assessing the strengths and weaknesses of tourism destinations, particularly with regard to the perceptions of actual and potential tourists. The application of place image theory is especially useful when it includes both the organic and projected images of a

destination, comparing how tourists' perceptions change after visiting the destination (Selby and Morgan, 1996: 287). In fact, the mandate of a destination-marketing organisation is to control projected images. However, these projected images are open to multiple interpretations by potential visitors. Knowing how these images are formed is critical to strategizing how to create, enhance or change them (MacKay and Fesenmaier, 1997: 541). At each stage of his visit, the potential tourist may hold different images of a destination, images that are constructed by the amount, source and objectivity of the available information. This range of imagery has been described as a hierarchy of place images, ranging from initial perceptions based on organic sources, to a modified or re-evaluated image upon visiting the destination. This modification results in a much more realistic, objective, differentiated, and complex image (Selby and Morgan, 1996: 288). It follows then that there can be significant differences between the organic and projected images, which a tourist has of a destination before visiting it, and the re-evaluated image that is formed following a visit. Fakeye and Crompton (1991: 11) refer to the re-evaluated image as the complex image, which is formed when a tourist has a direct experience of a destination. Hence a comparison between organic image, induced images and actual images determine brand behaviour, that is, whether tourists' are likely to revisit, spread positive word-of-mouth and recommend the destination to others. The authors' proposed model would include the following components based on the above discussion.



Discrepancies between organic and projected images can arise from unrealistic naïve images held by tourists or from a failure on the part of the destination to meet expectations. The perceived image is therefore, a dynamic concept based on the previous knowledge and the experience of the tourist at the destination. The tourist's evaluation of that knowledge will affect his/her image of the destination (Hu and Ritchie, 1993). The periodic monitoring of tourists' perceptions can indicate the negative organic images that need addressing, analyse the projected image and reassess satisfaction with the various aspects of the product itself. If the organic image is unfavourable, a significant proportion of visitors will decide not to visit. It is particularly these non-visitors whom tourism marketers need to know more about. This is in order to

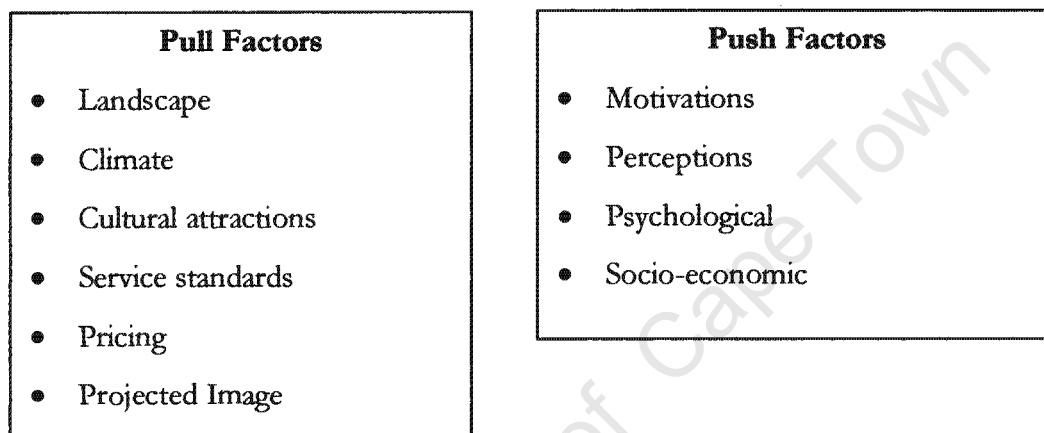
identify the nature and sources of the unfavourable organic information, and to consider them in planning any promotional activity.

Adding to this, Chon (1990) suggested that a primary image is formed when a tourist has made a decision to travel somewhere. The tourist selects certain destinations as possible choices and it is these initial images, which Chon describes as primary images. The construction of these primary images of destinations is based on certain push and pull factors. The pull factors are described by Chon as the attractiveness of a region and its various elements. These elements fall into three basic categories namely: static factors, dynamic factors and current decision factors. Static factors include the natural and cultivated landscape, the climate, means of travel to the region and in the region, and historical and local cultural attractions. Dynamic factors include accommodation, catering, personal attention and service, entertainment and sport, access to the market, political, conditions and trends in tourism. Current decision factors include the marketing of the region and prices in the region of destination as well as in the country of origin (Lubbe, 1998: 24). Projected image is defined in the literature as a pull factor in the destination selection process, which is transmitted by communication channels targeted at the potential tourist (Ashworth and Voogd, 1988; Baloglu and Uysal, 1996). The push factors on the other hand, are the needs and motives of consumers for travelling. Push factors are considered as socio-psychological variables that predispose an individual to travel in general, and the intangible or intrinsic desires of the individual (Baloglu and Uysal, 1996; Lubbe, 1998). Among these factors, the literature emphasises motivation, preferences, objectives and perception. Chon (1990) suggests that Maslow's (1958) hierarchy of needs is the foundation for travel motivations.

Thus the attractiveness of a destination depends on the relationships and interactions of push and pull factors. These factors act together to function as antecedent events for an individual's travel motivation and it is at this point that an individual becomes a potential tourist. However, Chon (1990) does not state that specific push factors are linked with specific pull factors or that an organic, induced or complex image must be present before a primary image can be constructed. It remains a complex set of associations that is not easily explained (Lubbe, 1998: 25). For example, a potential tourist who has a strong need for recognition in his social environment may place a destination on his list of possible choices simply because 'everyone else' has been to that destination. Here the attractions of the destination are of secondary importance, the primary consideration being his need for recognition. Secondly, the potential tourist has needs that can only be met by specific destinations. For example, if a potential tourist has a need to acquire historical knowledge he will consider only specific destinations that offer these attributes that satisfy his need. Thirdly, a potential

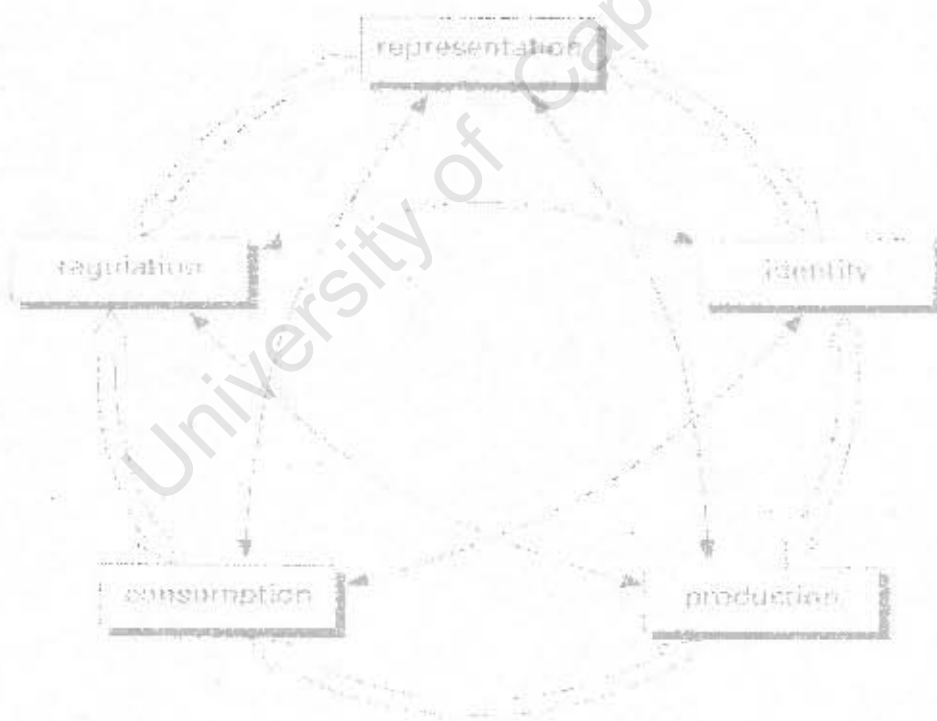
tourist can be driven equally by both push and pull factors. For example, a potential tourist may have her annual leave scheduled during which she wants to travel somewhere. The flexibility of both her needs and the attractions of a destination equally determine her choices.

Given that Chon (1990) suggests that push and pull factors affect the creation of a primary image of a destination and the primary image influences destination choice. It makes sense to include push and pull factors in the model. Chon (1990) and Lubbe (1998) further suggest that projected images of a destination can be considered as a pull factor. Therefore the pull factor component of the proposed model will include projected or induced images as a sub component. In essence, the following components will be included in the model.



Some attributes or pull factors of destinations such as climate and scenery have been recognised as being universally important in destination selection (Hu and Ritchie, 1993). Destinations have been traditionally promoted in terms of their specific tourist attributes (MacKay and Fesenmaier, 1997) but research showed that this may not always be the most effective method as certain tourists are more motivated by push rather than pull factors. This implies that the promotion of a destination's image should begin by determining the push/pull orientation of potential tourists in the construction of primary images in the tourist generating country and not by merely promoting a destination's most important tourist attractions. It is not the qualities of the destination that provide the impetus for travel to the destination, it is the image of how those qualities can fulfil the needs and expectations of the potential tourist. In tourism, image therefore becomes reality. Lubbe (1998: 38) argues that the image of South Africa is still organic rather than induced and the needs and expectations of potential tourists unknown.

Yet another point of view on how destination image is formed is that of Morgan and Pritchard (1998). They suggest that people utilise frames of reference to make sense of and to explain the world in which they live. These frames of reference mediate their interpretations of reality and, not surprisingly, these mediating frameworks similarly influence the realm of tourism marketing. What is promoted and how it is promoted is a product of the particular political, social and cultural system in which it operates (Morgan and Pritchard, 1998: 16). Destination imagery is constructed through what has been described as the 'circuit of culture' as shown in **Figure 4**. This recognises that language, representations and meaning do not exist as isolated concepts but are inexorably intertwined in a continuous circle whereby language utilises representations to construct meanings. As Boorstin (1990: 7) commented '*overtime, via advertising and the media, the images generated of different gazes come to constitute a closed self-perpetuating system of illusion.*' In this way, tourism imagery is one element in the circuit of culture, reflecting and reinforcing the circuit of knowledge and power. The tourism image therefore emerges as one sphere into which one can look in order to understand the dialogues between, and amongst, the creators, the consumers and the consumed. These dialogues enable all three groups to create shared meanings and to interpret and see the world in similar ways (Morgan and Pritchard, 1998: 18).



Source: Morgan and Pritchard (1998)

**Figure 4:** Circuit of Culture

The relationship between official tourism images (projected images) and organic images derived from other non-tourist sources is circular, since the circuit of culture reveals that tourism image is grounded in wider cultural discourse. Thus, tourism and culture have a symbiotic relationship whereby tourism makes use of cultural meanings to frame its imagery, meanings that are drawn from many areas in society. If one considers for example the British society which is perceived to be conservative and deeply rooted in traditions and culture. Such an image has been developed over years through the use of the Royal Family, Buckingham Palace and Westminster Abbey as icons to convey meanings about the British culture. Therefore promotional images not only reflect the prevailing cultural values of a society, drawing upon current images and stereotypes, but also play a vital role in shaping these values through their contribution to the process of socialisation. The ultimate purpose of image creation is to influence buyer behaviour and manipulate demand (Morgan and Pritchard, 1998). The challenge that faces Cape Town is to identify what cultural meanings to convey to the different target markets and which visual imagery and icons to use to convey those meanings. The cultural diversity of Cape Town adds a level of difficulty that is unique to this destination and requires consultation with stakeholders in deciding which aspects of culture to promote.

Furthermore, the fact that places are multi-sold complicates their projected images. For instance, in the case of Wales, there are thirteen different national bodies promoting the country overseas for different purposes and to different audiences, whilst the local state also has a promotional role and often conveys conflicting messages. This is also the case of the Western Cape tourism industry where too many agencies are promoting the destination and promotional messages are often in conflict. It is therefore, important to realise that places exist in the minds of many audiences at different times and in different ways so that consistency in promotion is the key to success (Morgan and Pritchard, 1998: 58). Thus, a city such as Cape Town does not have an identity that is static or monolithic. Destination marketing agencies, events, and media are constantly influencing image perceptions. Yet attempts to represent changed identities of a place are often time consuming and expensive, particularly as they can challenge concepts and ideas that are deeply rooted in the popular psyche, and those that are drawn from popular culture which conform to prevailing ideologies.

### 2.4.3 THE ROLE OF DESTINATION IMAGE IN DESTINATION SELECTION

As discussed above, stimulus and personal factors as well as social, political and cultural circumstances determine image. Socio-demographic characteristics such as age, income, and occupation have been suggested as important factors that influence the formation of tourist images as well as the perception of travel experience (Baloglu, 1997). The travel and tourism literature suggests that destination image is a critical component in the destination selection process (Gunn, 1972; Goodrich, 1978; Gartner, 1993; Um and Crompton, 1990; Selby and Morgan, 1996; Baloglu, 1997; Baloglu and McCleary, 1999). Ahmed (1996: 44) argues that image of a destination and attitude of tourists towards that destination seem to be two of the most important factors in destination selection. Goodrich (1978: 8) showed that the more favourable the perception towards a destination, the greater the likelihood of choice from among similar alternatives. Thompson and Cooper (1979) and Woodside and Sherrell (1977) demonstrated empirically a strong link between destinations most memorable (and accessible) in consumers' minds as places to visit and attitudes and intentions toward actually visiting these destinations. Similarly, research by Goodrich (1978), Pearce (1982), and Woodside and Lysonski (1989) demonstrated a clear relationship between positive perceptions of destinations, and positive purchase decisions. Although these perceptions may not be based on fact or first-hand experience, they nevertheless exert a vital influence on a potential tourist's decision to visit a destination. Also, the more favourable the perception of a given destination, the more preferred that destination will tend to be (Goodrich, 1978: 6). Yet negative images, even if unjustified, will deter potential tourists and result in a non-purchase decision.

Um and Crompton (1990) conceptualised a cognitive model of pleasure travel destination choice with specific reference to images and attitudes towards destinations. The model consists of three concepts: external inputs, internal inputs and cognitive constructs. External inputs are the various sources of information such as promotional material through the media (symbolic stimuli) and word-of-mouth (social stimuli) as well as actual visitation to the destination (significant stimuli). These reinforce previous propositions that actual image of a destination will influence brand behaviour. Internal inputs comprise the socio-psychological set of the traveller and include socio-demographics, values and motivations. They tend to relate to the push factors discussed earlier. Cognitive constructs are the perceptions of destination attributes in both the awareness and evoked set of tourism destinations. These authors noted that the perceptions of destination attributes are formed and influenced by both external and internal inputs.

Woodside and Lysonski (1989) also proposed a general model of traveller destination choice. Their model provided support to this study in identifying major forces of image formation in a travel and tourism context as well as the direction of relationship between cognitive and affective components of image. According to their model, marketing variables and traveller variables such as previous destination experience, income, age and value system influences a traveller's image of a destination.

Moutinho (1987) on the other hand, considers the process of destination selection as an investment with a non-tangible rate of return, the purchase of which is often prepared and planned before-hand. Batra et al. (1996) point out that consumers tend to utilise images and to stereotype objects in order to minimise their mental load and thereby avoid complex analyses. In this sense, the perceived images of different destinations tend to be simplified in the minds of the tourist themselves, and are formed by the information that they possess. Hunt (1975) argues that the images, beliefs and perceptions that people have about a destination can influence the growth of a tourist area as much as, or even more than, tangible resources. This is because the potential tourist, having a limited personal experience of the destination, acts on the basis of his/her image of the destination, and this perceived image does not necessarily coincide with objective reality. Thus, the tourist is choosing the destination based on his own interpretation of what the destination should look like.

In addition to the above, Hu and Ritchie (1993) found that scenery, climate, availability/quality of accommodations, attitude toward tourists, food, and value for money were the most important factors taken into consideration when choosing a holiday destination. In the same way, Heung et al. (2001) found that safety, cultural diversity, variety of activities and attractions/amenities were factors that considerably influenced travellers' choice of Hong Kong as a holiday destination. Yet research by Andreu et al. (2000: 53) on the perceived image of Spain as a holiday destination showed that personalised stimuli (previous experiences and word-of-mouth) were the most important sources of information for selecting a destination. Their study confirmed the importance of value for money, natural resources, culture, nightlife and entertainment, safety, and accessibility in the selection of a destination. These attributes were rated from very important to important when choosing a place to visit. Therefore destination selection is influenced to a large extent by destination image conveyed primarily through cognitive attributes.

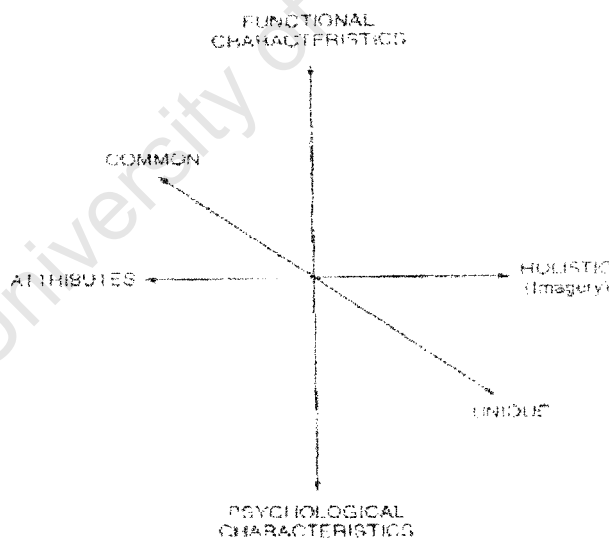
## 2.4.4 MEASURING DESTINATION IMAGE

Most image studies in tourism have used a list of attributes to measure some of the more functional components of destination image, such as scenery, climate, facilities, and attractions. They emphasised the physical qualities of places where, there is indeed an interaction between physical qualities of places and the meanings (affective ties) they acquire. Thus, the main concern has been with the more tangible physical components of place perception commonly associated with designative images (Pearce, 1982; Walmsley and Young, 1998). The evaluative component of images appears to have been overlooked. Tapachi and Waryszak (2000: 38) confirm that tourism researchers have not been successful in reconciling conceptualisation and operationalisation of destination image. Almost all researches on destination image rely on the use of a piecemeal (or attribute based) approach via scaling methods (such as semantic differential scale, likert-type scale, and multidimensional scale) that capture only the individual attribute component of destination image but not the holistic component. It cannot be assumed that destination attributes on their own and in themselves are motivationally adequate to explain why individuals or groups gravitate towards one place and not to another (Dann, 1996: 42). Some recent works, however, studied both cognition and affect toward environments and destinations (Dann, 1996; Baloglu 1997; MacKay and Fesenmaier, 1997; Baloglu, 1998).

Baloglu (1997: 231) suggests that measuring destination image is paramount in order to design the most effective positioning, differentiation and marketing strategy for a destination. Destination marketers should have a clear understanding of what variables may affect the destination image and how they contribute to the development of that image to emphasise the relevant attributes in any destination promotion campaign. Echtner and Ritchie (1993: 3) present a framework, which suggests that to completely measure destination image, several components must be captured. These include attribute-based images, holistic impressions, and functional, psychological, unique and common characteristics. They propose that a combination of structured and unstructured methodologies is necessary to measure destination image. The structured approach involves various common image attributes being specified and incorporated into a standardised instrument, usually a set of semantic differential or likert scales. The advantages of such an approach to image measurement include that it is easily administered, produces data that can be easily coded and analysed and it facilitates comparison across destinations (Echtner and Ritchie, 1991). An unstructured approach employs an alternate form of measurement using free form descriptions to measure image. Attributes are not specified at the onset of the research but rather the respondent is allowed to more freely

describe impressions of the destination product. Both these methods will be employed for this particular research.

Echtner and Ritchie's research concluded that destination image should be envisioned as having two main components: those that are attribute-based and those that are holistic. Each of these components contains functional (or more tangible) and psychological (or more abstract) characteristics (1993: 3). A combination of attribute-based images and holistic impressions of Cape Town will be measured. Images of destinations can also range from those based on 'common' functional and psychological traits to those based on more distinctive or even unique features, events, feelings or auras (Echtner and Ritchie, 1991). The conceptual framework developed by them is shown in **Figure 5** below. Essentially the framework consists of three continuums: attribute-holistic, functional-psychological and common-unique. On the attribute side are the numerous perceptions of the individual characteristics of the destination, ranging from functional to psychological. On the holistic side, the functional impressions consist of the mental picture or imagery of the physical characteristics of the destination, while the psychological impressions could be described as the atmosphere or mood of the place (Echtner and Ritchie, 1993: 5). The attribute-holistic continuum in essence proposes that any product is perceived both in terms of pieces of information on individual features, or attributes, and in terms of more gestalt, or holistic impressions (MacInnis and Price, 1987).



Source: Echtner and Ritchie (1991)

**Figure 5: Dimensions of Destination Image**

The common-unique continuum highlights the idea that images of a destination can range from those perceptions based on common characteristics to those based on unique features or auras. On one extreme of the continuum, the image of a destination can be composed of the impressions of a core group of traits on which all destinations are commonly rated and compared. For example, a destination image can include ratings on functional characteristics such as price levels, transport infrastructure, climate and so on. The destination can also be rated on very commonly considered psychological characteristics such as level of friendliness, safety, quality of service and so on. On the other end of the continuum, images of destinations can include unique features and events or special auras (Echtner and Ritchie, 1991). Holistic and unique images are particularly important in determining how a particular destination is categorised (stereotype holistic impressions) and differentiated (unique attractions, auras) in the minds of the target markets. In essence, measuring how the destination is positioned in the consumer's mind. Since the goals of positioning strategy are to create a clear, positive, and realistic image, the information provided by open-ended questions in a quantitative study can suggest issues that should be addressed in subsequent destination marketing plans. The extent to which a destination is associated with distinctive or unique characteristics or trip type categories would provide a useful basis for developing competitive positioning and promotion campaigns (Kim, 1998).

It is clear from the literature that image should be measured both on its physical qualities and its affective ties. Um and Crompton (1990) state that the image of a place as a pleasure travel destination is derived, to a greater or lesser extent from attributes towards the destination's perceived tourism attributes. The literature suggests the following attributes to be part of a list that is used to measure the image of a destination. Murphy (1999) used a semantic bi-polar scale to measure the image of Northern Australia using attributes such as landscapes, safety, environment, public transport, weather, friendliness of locals, wildlife, historical attractions, shopping opportunities, and accommodation amongst others. On the other hand, Walmsley and Young (1998: 66) in their study of evaluative images in travel behaviour in a coastal region of Australia identified six constructs to evaluate places: commercialised-not commercialised, appealing/attractive-unappealing/unattractive, quiet-busy, trendy-not trendy, boring-interesting, relaxed pace of life-fast pace of life, unpleasantness-pleasantness, and arousal-activation. Baloglu and McCleary (1999) used distinct cognitive, affective and overall image constructs to measure the image of Turkey, Egypt, Greece, and Italy. The cognitive construct was made up of attributes such as good value for money, beautiful scenery/attractions, good climate, appealing local food, personal safety, good nightlife and entertainment and so on. The affective component of image was measured using bi-polar scales such as unpleasant-pleasant, gloomy-

positioning strategy is a distinctive brand image on which customers rely in making choices (Morgan and Pritchard, 1998: 141).

The concept of branding has been extended to people, organisations, art, sports and entertainment, and geographical locations. Kotler, Haider and Rein (1993) argue that the concept can even be extended to tourist destinations and that places such as Acapulco, Palm Springs, and the French Riviera have developed strong reputations, consumer expectations and perceptions. Although there is general agreement that branding can be applied to tourism destinations, there is less certainty about how the concept translates into practical marketing activity. Morgan and Pritchard (1998) point out there is as yet very little empirical research that explores the application of branding to tourism products including destinations. Nevertheless, in a tourism context, a brand is understood to represent a unique combination of product characteristics and added values, both functional and non-functional, which have taken on a relevant meaning, which is inextricably linked to that brand, awareness of which might be conscious or intuitive (Morgan and Pritchard, 1998: 140). When a destination is branded, the brand name is relatively fixed by the actual name of the location. The power of branding lies in making people aware of the location and then linking desirable associations to the brand (Keller, 1998: 19) that influence purchasing behaviour (Ries and Ries, 1998). In essence, a destination brand is a fully integrated system of experiences -all focused on the customer (Taylor and Wheatley, 1999). It is a cluster of visitor perceptions attaching to various destination experiences sold under a specific brand name (Ephron, 1996).

The first stage in building a destination brand is to establish the brand's core values that should be durable, relevant, communicable, and hold saliency for potential tourists. Once these core values have been established, they should underpin and imbue all subsequent marketing activity so that the brand values are cohesively communicated. The brand values should also be reinforced by brand elements, which ensure consistency of message and approach (Morgan and Pritchard, 2000: 281). Branding destinations combine marketing products and services and the commoditisation of people's culture and environment. The complexity of the issue requires a particular focused effort by tourism researchers since it embodies a multiplicity of concerns needing a multidisciplinary response (Gnoth, 1998: 759). Certainly, provenance is important and influences brand perceptions. In consumer goods markets, brands such as Microsoft and Coca-Cola are seen as being American and they drive their strength from the brand equity of USA itself, which is associated with independence, attitude and technological ability. Provenance is even more critical

for tourism destinations as countries pre-exist any identities crafted for them by marketers and neither their advertisers nor consumers can have objective views of them (Morgan and Pritchard, 2000: 281).

A destination brand is not built overnight. Its success is measured in decades, not years and results from marketing consistency. Given the various sources of information tourists use and the width and breadth of attributes a destination brand necessarily covers, problems of communication and co-operation amongst tourism facilitators, resource base (including the population) and media are bound to occur (Gnoth, 1998). It is the responsibility of destination marketing organisations to limit such occurrences thereby creating the necessary marketing consistency that leads the customer to expect that the brand will continue to display the same characteristics, and this expectation creates a covenant between the brand and the customer. The source of that consistency is often referred to loosely as the brand's values, because it is presumed that, as is the case with a person, the only way a brand can be truly consistent is by being true to itself, its beliefs and creeds, at all times (Chevron, 1999). Great brands establish a positive connection with their audience, an emotional bond and memorable position (Harvin, 2000). It provides consumers with more information with which to make choices (Miller, 2001).

Differentiation of brands lies at the heart of marketing. The brand positioning statement captures the essence of what makes a brand different and unique from competing brands. It becomes the consistent message that is communicated over and over to the target audience. This is critical because it focuses the organisation on what the customer expects/needs from the product/service offering. It becomes the guidepost for promotional and marketing efforts. The simple structure of 'one brand, one brand audience' has been replaced by a constantly changing, flexible, sometimes multi-branded environment in which a brand must be broad enough to touch all its constituencies, yet simple enough to be understandable to all, rich enough to stretch, yet specific enough to be personal (Winkler, 1999). The brand positioning statement also provides one other key advantage – because the organisation developing the brand knows the position it wants to have in consumers' minds, this makes it easy to measure the strength of the brand. Brand differentiation gives an organisation an advantage only if customers value it. If the position that a brand wants to occupy can be easily and credibly duplicated, it is not defensible. The value of the differentiation will be short-lived. Differentiation not only helps the organisation but it also helps consumers by further explaining the strength of the organisation marketing the brand or its products/services (Miller, 2001).

Contrary to the focused marketing message with its USP (Unique Selling Proposition) mantra for product and services, destination branding is complex by design: a rich brand is a gestalt made of multiple messages, associations and character traits. After all, a person or product with a single character trait could hardly be described as 'having character.' Likewise, the values and associations that form the character of a strong destination brand are never one-dimensional. The destination itself is multi-dimensional and therefore the plurality of messages, which is a liability to the marketer, is an asset to the brand (Chevron, 1999). However, no matter how inspired and offbeat the messages might be, it must emanate from the brand's core identity to establish added value. Identity is at the centre of the brand's essence, surrounded by benefits, attributes and emotion. The brand's essence draws on the soul, or core, of the brand to set the product or company or destination apart from all others in the category. It is what the brand stands for in the eye of the customer and not what management wish it were that defines the essence of the brand and its sustainable point-of-difference (Martin, 1998). Thus the lesson to be learned when building a brand, is that it is important to look beyond the tangible product or benefits, which is more than likely to change over time, and think about what can be the sustaining deep core of the brand, the essence, which is virtually unchanging (Winkler, 1999).

But often destination marketers believe that once a brand is positioned in the minds of customers, it is difficult to change that positioning. It is true that as markets change, positioning must reflect those changes but the brand itself should not. The brand may be bent slightly or given a new slant, but the essential characteristics of the brand (once those characteristics are firmly planted in the mind) should never be changed. This is because the most important aspect of a brand is its single-mindedness. A singular idea or concept that the destination marketer owns inside the mind of the prospect (Miller, 2001) via brand associations that are communicated through various channels that are mutually reinforcing (Chevron, 1999). These brand associations must be simple and benefit oriented, no matter how complicated the product or the needs of the market are (Ries and Ries, 1998). They must be developed by looking at the brand from 360-degrees. The destination marketer needs to understand the brand from all angles, just as the consumer sees it. The consumer's perception of the brand has to do with the sum total of his experience with the brand, not just what the destination marketing organisations deliver through advertising and promotion (Kiley, 1998).

Given the complex nature of destination products, a destination brand usually will reflect the beliefs of its management and the idiosyncrasies of the organisations marketing it. This is often a major source of conflict

between those responsible of marketing the brand and those who own the various components of the brand (accommodation, entertainment facilities, restaurants etc.). The social and managerial problems when developing a brand for generically different partners within the tourism system supplying the tourism experience have been noted by Gnoth (1998: 760). He suggests that co-operation between all players, both in the private and public sector, is essential for the success of the brand. An example of a brand that needed such co-operation for it to be successful was Oregon. It was established that the only way brand Oregon was to survive in this increasingly competitive international market place was through:

- Branding efforts being a state initiative that involved tourism marketing.
- Label and logo programmes that were flexible as regulatory labelling programmes did not work.
- Most businesses recognised the value of aligning their product with Oregon's image, but only if it was appropriate to the product and/or service.
- Oregonians' values and pursuit of a quality lifestyle were the key to the state's 'personality'.
- The state should provide guidelines and resources to help businesses get started, but let the private sector get on with the job after that (Curtis, 2000: 78).

London, San Francisco, Sydney and Rio de Janeiro have been successful in their branding initiatives only through co-ordination and active commitment of private and public sector bodies. The brand positioning for each city was clearly understood in meaning, application and management across all stakeholders (AVG, 2002). The JMI is following a similar approach for the city of Cape Town. When the beliefs and idiosyncrasies of all parties concerned are expressed consistently, the customer will progressively trust the brand over time. This is essentially what Light (1994) defines as a power brand - a brand that indicates and distinguishes the source of a promise as being distinctive, trustworthy, and relevant to the consumer. Such a brand is particularly adapted to its environment and thus it survives and flourishes (Keller, 1998: 5). The brand is the ultimate example of an organisation's marketing skills – their finest and most valuable production. This is the ultimate goal of building Cape Town as a brand.

As mentioned before, the destination brand is made up of many different sub-brands as a result of consumers buying into a variety of services and experiences that are already branded. The more symbolic experiences are for tourists, the more successful is the brand in the long term, simultaneously, the more symbolic the brand attributes, the less tangible and more difficult are they to be communicated as unique (Gnoth, 1998). Therefore consistency in brand identity is vital to lead to the virtual ownership of a position

in consumer's mind. A successful branding synergy is required between destination brand and individual service brands to create a powerful brand image of the destination. A destination brand is perceived and thus requires a fusion of not only home and host market cultures but of corporate culture as well to be successful (D'Hautesserre, 2001: 306). The brand serves as a foundation for building trust-based relationships with customers while the brand personality helps to symbolise certainty and commitment to whatever the brand personality suggests. It is essentially a promise of future satisfaction. However, it must be recognised that it is difficult for a city or nation to have a consistent personality because a nation or city is a constellation of different images (O'Shaughnessy & O'Shaughnessy, 2000:60). It is hard to know exactly for example, what Cape Town and Western Cape do or should stand for. This thesis will shed light on this issue.

Also, strong brands find ways to achieve visibility by building and supporting the brand identity through involving the customer in the brand building exercise. These experiences create a relationship that goes beyond the loyalty generated by any objective assessment of a brand's value. It covers the entire consumer experience and includes all the assets critical in delivering and communicating that experience (Joachimsthaler and Aaker, 1997: 45). Word-of-mouth then becomes the most powerful way of reinforcing the brand image thereby generating the desired brand awareness. In the context of tourism, the reliance on past experiences and normative standards may be even more pronounced than information that was communicated from external sources (Mazursky, 1989: 334). Brands are therefore about building relationships with customers. Destination marketers know that a problem with branding is avoiding 'cognitive dissonance'—sending out key messages that contradict other key messages, or raise expectations beyond the level the destination can satisfy (Economist, 1998: 66). By involving customers in building the brand, which is essentially about the destination experiences, cognitive dissonance can be reduced.

Without the loyalty of its customers, a brand is a mere trademark. With the loyalty of its customers, a brand is more than a trademark, it is a trust mark of enormous value. Creating and increasing brand loyalty results in a corresponding increase in the value of that trust mark. This happens when a customer continuously invests trust in a brand that leads to a bond growing between the customer and the brand. Ultimately the brand develops an enduring relationship with the customer and customer experiences shape that brand. Thus when customers can define the brand for themselves, they are more likely to care about it (Rasmusson and Cohen, 2000). Since this entire process relies on consistency, management's vision of the brand's values should incorporate all it knows and feels about its customers (Chevron, 1999). If the messages are not

consistent, it is a lost opportunity to make an extra impression. If there are too many diverse messages about a destination, there is a high risk of not being remembered and destination marketing organisations have to make a fresh start every time (Lorge, 1998).

Furthermore, branding has to do with what customers think about a destination. Some may think 'better quality', 'fun', 'unique experience'; others may think 'more expensive', 'boring', 'crime and unfriendly people'. Branding is about certain customers not all of them. What the destination wants to sell does not count; all that is important is what customers want to buy (Graham, 2001). An example of a non-tourism related company that knows the difference is Wal-Mart. Wal-Mart has done as good job as any company when it comes to branding. When some people think of Wal-Mart, the word 'value' flashes through their minds, while others think of somewhat unpleasant surroundings, lower quality, and poor service. One group is Wal-Mart customer; the other is not, and Wal-Mart knows the difference. Similarly, as travel destinations turn to branding for differentiation, they must comprehensively assess all their potential target markets and choose only those that will maximise their appeal. Targeting countries haphazardly can only damage the brand, as the values held by consumers in these countries may not be the values that the brand stands for.

The task of branding a destination is complicated further when a country, city or region already has favourable or unfavourable perceptions in the market place. The favourable perceptions might not be the ones that the country, city or region wants to use to build its sustainable competitive advantage. The task is even harder when a country has a negative perception in the market place. Places such as Detroit and Columbia have a negative image, Detroit is perceived as being the murder capital of the US while Columbia is the drug capital of South America. These places, if anything, want to curb such image. Yet if the place advertises a new image but continues to be the place that gave rise to the old image, the image strategy will not succeed (Kotler et al., 1993). Clearly the literature suggests that Cape Town and South Africa have to implement preventative measures to curb their crime rates and then redefine their image. But in reality curbing the crime rate in a city or country may take several years, a place cannot wait for such a problem to be solved to redefine its image. Such a process can happen concurrently, where South Africa can capitalise on brand Cape Town, which is perceived in a more positive light to emphasise the unique experience that the destination offers while solving the crime problem in the country/city. Kotler et al. (1993: 159) suggests that icon marketing can correct a negative image. A single person well positioned in understanding the demands of the market place can influence and reshape a public's perception of a place. South Africa has made use of such a strategy by using the former President, Mr. Nelson Mandela, as an icon to draw tourists

but such a strategy is only a short-term solution. In the long-term the product offering of a destination must be competitive and unique to attract visitors and the destination must be perceived as being safe.

Another example of a country that is perceived negatively is Northern Ireland that had to counteract the difficulties of access and negative worldwide publicity. In addition, the country had no special inherent advantages and suffering from the same problems facing emerging destinations such as lack of funds for marketing and promotion purposes. The challenge for tourism was to build awareness of the destination in the first place by emphasising on its positive attributes and use this initial positive momentum to deliver longer-term sustainable growth (Lennon and Titterington, 1996). South Africa faces a similar problem where its image of crime and unsafety is undermining tourism growth. Lennon and Titterington (1996) went further to say that while the 'curiosity' value attracted visitors for a single visit to Northern Ireland, repeat business could only come from the development and effective promotion of a competitive tourism product. Factors such as 'Nelson Mandela' and 'political transformation' had the same effect on South Africa where there was a significant increase in number of first-time visits to South Africa after the 1994 democratic elections. However, growth in international tourism and repeat visits have been on a downward trend since then. This has amplified the importance of competitiveness of tourism products to be successful today as a destination. No matter how good the product is, if it is not well marketed, the chance that visitors will take notice is very minimal given the variety of choices available to them.

### **2.5.1 BRAND EQUITY**

Related to the concept of branding is brand equity, which is defined in terms of the marketing effects uniquely attributable to a brand (Keller, 1998: 42). It is increasingly recognised that brands have immense financial significance, and it can be argued that the whole concept of the value of a strong brand is primarily a financial one (Winkler, 1999) represented by its brand equity. The Joint Marketing Initiative has set one of its goals to be increasing the value of Cape Town as a brand in the international market place. Such a goal can be achieved through looking at the brand from 360-degrees and understanding tourists' behaviour in choosing Cape Town as a destination, their expectations and perceptions and also behaviour after their visit.

Brand equity as a term is of particular importance to destination brands as it refers to a process of taking the best possible advantages of what already exists about a destination and making the most out of it rather than 'inventing' a new brand or destination (Hamilton, 2000). Service performers are a powerful medium for building destination brand meaning and equity. Their actions with customers transform brand vision to

brand reality. With their on-the-job performances, service providers turn a marketer-articulated brand into a customer-experienced brand (Berry, 2000: 134). Branding is not only an opportunity to establish a mental picture of the service and its reason for being for customers; it also is an opportunity to do this for service providers. The point is that employees from managers right through to front-desk employees must internalise the brand. The more service providers internalise the concept and values of the service, the more consistently and effectively they are likely to perform it (Berry and Parasuraman, 1991). This helps towards positioning the destination in consumers' mind. At a minimum, any brand should ensure quality so that brand recognition can simplify choice and reduce risk (Berthon, Hulbert and Pitt, 1999: 61).

## 2.5.2 BRAND AWARENESS

For branding strategies to be successful and brand equity to be created, consumers must be convinced that there are meaningful differences among brands. The brand must have a high level of awareness and familiarity among its customers who hold some strong, favourable, and unique brand associations in memory. The latter consideration is critical. Sources of brand equity include brand awareness and brand image that are considered to be part of brand knowledge. Brand knowledge can thus be defined in terms of two components: brand awareness and brand image. Brand awareness is reflected by consumer's ability to identify a brand under different conditions (Keller, 1998: 48). Brand awareness consists of **brand recognition** – reflecting the ability of a potential visitor to confirm prior exposure to the brand - and **brand recall** – reflecting the ability of potential visitors to retrieve the brand from memory when different product categories such as adventure tourism, health tourism and conferencing are mentioned. Thus increasing the familiarity of the brand through repeated exposure creates brand awareness and leads to a more favourable consumer response in some cases.

Kosslyn (1980) showed that the more occasions a brand name is recalled, the more the information in the image of the brand is decoded into belief statements about the brand. Keller (1998) suggests two methods for establishing brand awareness. First it is important to visually and verbally reinforce the brand name with a full complement of reinforcing brand elements such as slogans, logos, symbols or jingles that creatively pair the brand with the desired product categories. This is in essence translating the brand positioning statement into market-driven realisable actions. The second method refers to using a wide range of communication options (advertising, promotion, and public relations) to consistently reinforce the brand. In other words, because anything that causes the consumer to experience the brand can potentially increase familiarity and awareness, a number of different communication options must be used.

The role of visibility (brand awareness) in creating brand equity is often underestimated. Simple recognition can affect perceptions: people tend to like known brands even if they have never used or experienced them. This has important implications for destination marketing. Creating awareness of the destination brand should be the prime focus of marketing activities. Tourism destinations suffer more from ignorance of their existence by potential customers than from inefficiencies in management (D’Hauteserre, 2001: 300).

### **2.5.2.1 BRANDING ON THE INTERNET**

Many destination-marketing agencies complain about the lack of funds to build destination image and destination brand overseas. Joachimsthaler and Aaker (1997) are of the opinion that achieving the desired brand awareness is not dependent on the size of the advertising budget but rather on choosing the most effective channels and message. Many destinations set up websites hoping that it will create the desired awareness yet one of the most interesting areas of brand damage are websites themselves (Graham, 2001). Putting a destination brand name on a website does not make it an Internet brand. There are brands and Internet brands, and the two are quite different (Fisher, 2000: 388). Harvin (2000) suggests that an effective brand presence on-line requires more than a website and an e-commerce function. Cyber-branding involves carefully integrated on-line and off-line branding tactics that both complement and reinforce each other. Hence, many brand managers and destination marketing organisations are re-thinking their campaigns, harnessing the Internet to enhance and extend their brand reputation and potency. On-line branding is an area that has been specifically identified as being critical for the success of brand Cape Town.

Williams and Palmer (1999: 265) are of the opinion that synergy between destination brands and their web sites are critical for success. The diversity of suppliers in the travel and tourism industry and the increasingly discerning consumer mean that the quality and efficiency of information provision is becoming a differentiating factor for destinations. As new channels such as the World Wide Web develop, destination-marketing organisations have a unique opportunity to pull together suppliers and market themselves under one common identifiable brand image, thus controlling the quality of information provided and reducing the costs of information provision. The destination marketing organisation would act as a ‘broker’ for customers seeking professional travel advice in its region and thus add value to existing services for both customers and suppliers in terms of a strong centralised brand. Yet such an opportunity is also a threat to destination brands as it is quite possible that individual suppliers may seek to open up direct channels of communication with their existing and prospective customers rather than channelling efforts into the development of a central brand. Clearly the JMI is following the route of a centralised brand.

### 2.5.2.2 BRAND ELEMENTS

As mentioned earlier, another way to build brand awareness is through linking a desirable slogan, logo, symbol or jingle to a brand. These are commonly referred to as brand elements. A number of options and criteria exist for choosing brand elements. It is visual or verbal information that serves to identify and differentiate the brand. Brand elements can be chosen according to their:

- **Memorability** – easily recognised and recalled
- **Meaningfulness** – credible and suggestive as well as rich in visual and verbal imagery
- **Transferability** – mobile within the country itself (domestic markets) and across geographical boundaries (international markets) and cultures
- **Adaptability** – flexible enough to be easily fine-tuned due to changing customer needs and actions of competitors
- **Protectability** – legally secured and competitively well guarded

The first two criteria are more offensive marketing tactics to create and build the brand while the last three are more defensive considerations to maximise and protect the 'value' of the brand. Brand elements must be chosen to enhance brand awareness and facilitate the formation of strong, favourable and unique brand associations (Keller, 1998: 131).

The importance of brand elements cannot be emphasised enough and is not always understood. One brand that had difficulty using brand elements to create a strong identity was Wales. The Wales Tourism Board tried to create a unique brand Wales through the projection of core-themes – conveyed through Celtic imagery and typeface, the Welsh language and the slogan 'Wales-Cymru. Land of Inspiration'. In particular it urged the use in all promotional literature of the Welsh flag and the Welsh dragon as brand signatures. The majority of local authorities paid minimal reference to this potentially unique dimension, and in some cases ignored it completely. Most were concerned with promoting their own areas and authority names – most of which had little meaning to the potential tourist. If the strategy to differentiate Wales was to be effective, it was vital that the same messages were communicated and reinforced in all promotional literature, however, by pursuing their own agendas, the local authorities were actually undermining the Wales Tourism Board's attempt to establish a unique brand 'Wales'. This reflects the political realities of place marketing where destination promotion is often the responsibility of a variety of agencies and organisations operating at different government levels (Morgan and Pritchard, 1998: 59). Co-operation between different players is therefore critical for success.

Yet other brands such as Australia has been able to harness the power of brand elements in establishing a strong identity in the market place. Brand elements involve the use of icons to enhance brand memorability. Key Australian icons such as the beach, koala bears, kangaroos, sunshine, wine and aboriginal music have been used as brand signatures to enrich brand Australia. These representations helped to construct an identity of Australia centred on what differentiates the destination from other countries. This identity was grounded in a set of meanings that consumers could understand, recognise and share in, beginning thus what Morgan and Pritchard (1998: 71) termed as the cycle of culture. The creation of a new logo encapsulated the brand personality and brand architecture of the destination with an intention of creating a brand that was bold, exciting, energetic, vital, adventurous, yet friendly and fun. The end result was the creation of a logo depicting a yellow kangaroo against a red sun over a background of green and blue sea (Morgan and Pritchard, 2000: 292). Also, slogans, themes and positions are particularly important for destination brands due to customers being unable to evaluate the brand prior to purchase. They rely on the brand elements to form an opinion on what the destination offers. Keller (1998) went further to say that the judicious selection of brand elements and the resulting brand identity can make an important contribution to brand equity, but the primary input comes from marketing activities related to the brand and the resulting marketing program. There is no point in having brand elements that are creatively well executed but poorly marketed. They will undermine the brand.

Due to the complexity of destination marketing and branding, destination-marketing organisations often rely solely on brand elements to convey images and emotions about a brand. The customer on the other hand, faced with increasing choices tends to use simple cues such as brand elements to form an opinion of the destination. This is why brand elements are critical for the success of a brand. Icon marketing is perhaps the most effective way to link desirable associations with a brand. A city such as Sydney for example, capitalises on their harbour, opera house and bridge to create an identity for the city. However, the Olympic Games of 2000 have added depth and a new dimension to the city's international image, which results from an increased awareness of the brand. The city of London uses characters, symbols and personalities to convey a rich brand experience. Marketing and promotion campaigns use the Royal Family, beefeater, paddington bear, the Beatles, cabbies, phone booths, and the tube to create a rich imagery of the city (AVG, 2002). Though some of these brand elements seem to be trivial, they actually define what the city is all about. Cape Town must therefore make full use of icons such as Table Mountain and Robben Island without ignoring other elements such as 'braai', 'biltong', and 'different culture', which can contribute to differentiate and enrich the brand. Thus brand elements are useful in generating enthusiasm, momentum,

and fresh ideas. They provide a platform from which a place's image can be further amplified (Kotler et al. 1993: 151). The most effective brand elements however, are versatile and flexible, yet grounded in reality.

### **2.5.3 BRAND IMAGE**

Discussions of image are gaining increasing importance as tourism expands around the globe, bringing new challenges to destination marketing. One of the outcomes of the increasing number of tourist destinations is increased competition amongst established destination identities. The relative ease of substitutability in tourism products is well established and destinations offering a similar product at a similar price are highly interchangeable. In this ever more competitive marketplace, tourist destinations are increasingly adopting branding strategies in an effort to differentiate their identities. In particular, newer, emerging destinations such as South Africa and Thailand are attempting to carve out a niche and to create a brand image emphasising the uniqueness of their product. In order to rise above the media clutter of the tourism marketing world, more and more destinations are pursuing a highly focused and choreographed communications strategy in which branding plays a critical role (Morgan and Pritchard, 1998: 146). In fact, differentiating the image of one brand from another has become the priority of destination marketers.

Brand image is defined as consumer perceptions of a brand as reflected by the brand associations held in consumers' memory (Keller, 1998: 49). These associations are strong, favourable and unique attributes that consumers have in memory about the brand. They are created by marketers through various sources of information, by direct experience with the brand, external sources not controlled by the marketer such as word-of-mouth, intermediaries or inferences due to identifications with a company, country or person. It must be recognised that these associations may vary considerably depending on the particular groups of customers involved. However, the more deeply a person thinks about information available on a destination and relates it to the existing brand knowledge, the stronger are the resulting brand associations (Keller, 1998). The personal relevance of the information presented and the consistency with which this information is presented over time determines the strength of association.

Choosing which favourable and unique associations to link to a brand requires careful analysis of the consumer and competition to determine the optimal positioning for the brand. The brand must possess relevant attributes and benefits that satisfy the needs of customers for it to influence behaviour and attitude. Thus, favourable associations are those that are desirable to the customer and successfully delivered and conveyed by the supporting marketing program for the brand. The source of information creating the

strongest brand associations is direct experience with the brand. Also, to create a differential response that leads to brand equity, it is important that some of the strongly held brand associations are not only favourable but unique too (Keller, 1998: 52). Unique brand associations are distinct associations not shared with competing brands. If consumers believe and value unique attributes and benefits that the brand possesses, then they are more likely to evaluate the brand favourably and a greater likelihood of choice.

Brand images are not easy to develop or change. They require research into how residents and outsiders currently see the place; they require identifying true and untrue elements, as well as strong and weak elements; they require inspiration and choice among contending images, they require elaborating the choice in a thousand ways so that the residents, businesses, and others truly express the consensual image; and they require a substantial budget for the image's dissemination (Kotler et al. 1993:37). This thesis will identify the true, untrue, weak and strong associations with brand Cape Town. The brand image, to be successful, needs to be reinforced using brand elements. If the image is inconsistent with the slogan, themes, or positions, it undermines the place's credibility. Tourism researchers (Joppe et al., 2001; Pritchard and Morgan, 2001; Nickerson and Moisey, 1999) interpret brand image and destination image as being similar concepts because the image of a destination is largely portrayed through its brand. Therefore the previous debate on destination image applies to brand image as well. In fact, the brand is defined as a combination of images projected by the destination marketing organisations and the images received by the consumer (Williams and Palmer, 1999: 265). Brand advantage can be secured through image-building campaigns that highlight the specific benefits of a product, culminating in an overall impression of a superior brand (Morgan and Pritchard, 1998: 140).

A city, region or country has a complex and fluid brand image. Different parts of a city's identity for example, come into focus on the international stage at different times, affected by current political events and even by the latest news bulletin or movie. These images exist at different intellectual and cultural levels, and for different target audiences they have different meanings according to class, demography and so forth (O'Shaughnessy and O'Shaughnessy, 2000: 58). Supporting this view, Greenberg (2000: 228) maintains that to the extent that cities are divided along lines of class, race, ethnicity, and gender, at any given time, there will be a number of images coexisting and competing against each other for dominance. The city of San Francisco for example, has an image of rich geographical, multicultural, architectural and business environment. The image is further defined by icons such as Golden Gate Bridge, Alcatraz and the lyrical anthem of the city: 'I left my heart in San Francisco'. Coexisting with this image is an image of overt

personal/sexual expression with potentially negative image perceptions given that the city is the global capital for homosexuality (AVG, 2002). Such a dichotomy in existing perception and imagery is addressed to convey a consistent brand image. The right icons and images are promoted to each specific target audience but there is always a common theme running through irrespective of the target markets. Distinct groups with varying degrees of power and resources will try to influence destination marketers to promote a single image that serves their interests best. Yet the end goal of branding a city is that the name of the city itself will conjure a whole series of images and emotions and with them an impression of value. Ultimately, it is hoped that the city's identity will merge with its commercialised image as produced by advertising, media, and cultural industries and be repurchased as if it was real (Greenberg, 2000: 230).

Pritchard and Morgan (2001) acknowledge that the nature and the use of tourism images by marketing agencies in their branding strategies is constrained by historical, political and cultural discourses. So the key to exploit the fragmented images of a city is to exploit the right fragments in line with the product and targeted customer group. It is possible to speak of a dominant image, an image powerful enough to crowd out all the other meanings and resonance despite the existence of a cacophony of images for a city (O'Shaughnessy and O'Shaughnessy, 2000; Hubbard, 1996). Therefore if brand Cape Town is continuously represented with attributes and benefits such as scenery, relaxation, value-for-money and so on, in time they will be linked together. Nevertheless, the dichotomy in existing perception and imagery of Cape Town cannot be denied. On the one hand the city is perceived as cosmopolitan offering a first world experience while on the other it is perceived as unsafe with high crime rate, poverty and AIDS.

Also, brand image to a large extent influences the choice of one destination over another. The destination with the most favourable image is often the one being chosen. Yet it must be realised that the image that visitors have of a country might have nothing in common with reality. This is an issue that O'Shaughnessy & O'Shaughnessy (2000) warn destination marketers about. The image that a customer holds about a nation is first and foremost linked to that nation's people and culture. This, in effect, means that the images of most nations will be vague because there is a general level of ignorance of countries other than one's own (O'Shaughnessy & O'Shaughnessy, 2000: 56). South Africa is still relatively unknown as a destination nevertheless its people and culture. It is also negatively perceived overseas. 'The Cape' and Cape Town as brands therefore do not have powerful identities in the market place. For some brands, identity is bound up with their national affiliation: Brands of Swiss chocolate, French perfume and Japanese electronics are instantly meaningful partly because the sponsor nations do function as a brand – a brand moreover that can

signify an entire cultural history (O'Shaughnessy & O'Shaughnessy, 2000: 56). For such nations, tourism brands are more likely to succeed because consumers already view the nation in a positive light. Can 'Cape Fruit' and 'Cape Wine' do the same for the Cape or Cape Town as brands? The fact is that these brands do not have a high level of awareness in the international market place. There is no doubt however, that Cape Town is far better well known than South Africa as a tourist destination. Perhaps using Cape Town as the brand to market internationally will achieve more awareness and recognition than using South Africa.

Furthermore, Baloglu and Mangalolu (2001: 1) are of the opinion that the image of a destination is to a large extent influenced by marketing activities of intermediaries such as tour operators and travel agents. They are significant information sources and distribution channels influencing the images and decisions of travellers. They contribute to formation of induced images of the travellers in the active information search process. Particularly for international destinations, the role of travel intermediaries in promoting and creating images of the destinations augment because international travellers are more inclined to use travel intermediaries in their destination selection process. Therefore an understanding of images held by travel intermediaries would assist destinations in assessing their market images and influencing the image and behaviour of ultimate customers through distribution and promotion strategies. Research particularly shows that first-time travellers mostly rely on professional sources in their information search behaviour (Bitner and Booms, 1982; Snepenger et al., 1990). Thus, the images held by travel intermediaries about a destination are equally important as those held by travellers. Travel intermediaries are not likely to promote a destination for which they have a negative or weak image. Therefore, tourist destinations should carefully assess and improve their brand image to be included in tour packages developed and sold by travel intermediaries (Baloglu and Mangalolu, 2001: 4).

Brand image analysis provides valuable indicators of the cultural, historical and marketing processes in its evolution, and can help explain the complex relationships between the destination, each different market and the different social and ideological groups involved. Therefore, attention to and exclusion of certain destination attributes when marketing a destination can play a part in how destination promotional images are perceived. Extension and refinement would provide a sound basis for enhanced understanding of cultural influences (MacKay and Fesenmaier, 2000: 422). Marketing tools used to promote destination image logically strive to project positive images and meanings to potential visitors. As such, destination decisions may be based on symbolic elements of the destination as conveyed in visual imagery rather than actual features. Touristic representation is not singular rather they are plural in meaning and ideology (Mackay and

Fesenmaier, 2000). In fact, this helps explain the coexistence of radically different images for a single destination. Differences in image perceptions reflect both cultural distance and various marketing strategies applied to different markets (Draper and Minca, 1997: 14). Cultural distance, of course, does not correspond necessarily to physical distance. The larger the cultural distance is, the more simplified the brand image will be and the more stereotypes it will contain. The touristic success of such destinations will depend to a large degree on the ability of tour operators to identify some key attractions and, at the same time, to reassure the potential visitor that the destination features a safe, almost familiar environment, but with a touch of exoticism.

Finally, studies (Chon, 1990; Fakeye and Crompton, 1991; Hu and Ritchie 1993; Milman and Pizam 1995) have found that there is a significant difference between the brand image visitors and non-visitors have of the same destination. These studies generally found that traveller's images were modified after visiting a particular destination. Destination marketers should distinguish between visitors and non-visitors when developing image or positioning strategies for their destinations in a specific market because the two groups may require different positioning and communication strategies. A destination image as perceived by its actual and potential visitors plays an important role in determining its competitiveness as a tourist destination (Baloglu and McCleary, 1999).

## **2.5.4 TYPES OF BRAND ASSOCIATIONS**

As mentioned earlier brand image is to a large extent the type of strong, favourable and unique associations that a consumer holds in memory about a brand. These associations can stem from the attributes of a destination, benefits of that place or attitude of consumers towards the destination brand. Each of these will now be considered to illustrate their importance in building a brand.

### **2.5.4.1 ATTRIBUTES**

Attributes are those descriptive features that characterise a tourism product or service. They are of two types namely **product related** and **non-product related**. Product related attributes refer to a product's physical composition and are what determine the nature and level of product performance (Keller, 1998: 95). For example, a destination has a set of physical characteristics such as beaches, mountains, and scenery. These will determine whether a potential visitor has an interest in the destination or not. Non-product related attributes may affect the purchase or consumption process but do not directly affect the product performance. They arise from the marketing mix and how the product is marketed. For example price,

image of the destination, feelings and experiences are non-product related attributes that have been shown to influence the purchase decision.

#### **2.5.4.2 BENEFITS**

The second main type of associations is benefits. Benefits are the personal value and meaning that consumers attach to the product or service attributes. Benefits can be further distinguished into three categories according to their underlying motivations to which they relate: **functional benefits**, **symbolic benefits**, and **experiential benefits**. Functional benefits are the more intrinsic advantages of product or service consumption and usually relate to product-related attributes. These benefits are often linked to fairly basic motivations such as physiological and safety needs and involve a desire to satisfy problem removal or avoidance (Keller, 1998: 99). For example, a destination can satisfy the need for a holiday by having amenities catering for tourists. Symbolic benefits are the more extrinsic advantages of product or service consumption and correspond to non-product related attributes. Symbolic benefits relate to underlying needs of social approval or personal expression and outer-directed self-esteem. Thus consumers may choose a destination brand based on its prestige, exclusivity and fashionability. Experiential benefits relate to what it feels like to use the product or service and can correspond to both product related as well as non-product-related attributes. These benefits satisfy experiential needs such as sensory pleasure (sight, taste, sound, smell, or feel), variety, and cognitive stimulation (Keller, 1998: 100). In fact, experiential benefits are particularly important for destination brands as they form the basis for differentiating one destination from another.

#### **2.5.4.3 ATTITUDES**

The most abstract and highest level type of brand associations are attitudes. Brand attitudes are defined in terms of consumers' overall evaluations of a brand. They are important because they often form the basis for actions and behaviour that consumers take with the brand. Consumers' brand attitudes generally depend on specific considerations concerning the attributes and benefits of a brand (Keller, 1998: 100). Brand attitudes will be dealt in more depth at a later stage.

### **2.5.5 FAVOURABILITY OF BRAND ASSOCIATIONS**

Associations differ according to how favourably they are evaluated by potential visitors and visitors. The success of a marketing campaign is reflected in the creation of favourable brand associations such as fun,

friendly people, and good value for money such that a positive brand attitude is formed. Favourability in turn is a function of:

- **Desirability** – how important or valued is the image association to the brand attitude and decision made by potential visitors? For example, does Table Mountain contribute toward visitors having a positive attitude towards the destination? Does it influence potential visitor's decision to visit?
- **Deliverability** – creating a favourable association also requires the brand to be able to deliver on that desired association. For example, claiming Cape Town is safe, but can the brand really deliver on that attribute? What is the cost or investment necessary and length of time needed to create or change an association? Does communicating the desired association involve real changes in the offering or just perceptual ones as to how potential visitors think of the brand?
- **Communicability** – What are the current and future prospects of communicating information to strengthen a desired association? What is the most compelling reason and understandable rationale as to why the brand will deliver on a desired benefit/association? Can the actual and communicated performance of an association be sustained over time?

These are all questions that must have clear-cut answers before any marketing campaign is rolled out to alter or reinforce the desired positioning of brand Cape Town.

## **2.5.6 UNIQUENESS OF BRAND ASSOCIATIONS**

Brand associations may or may not be shared with competing brands. The essence of brand positioning is that the brand has a sustainable competitive advantage that gives potential visitors a compelling reason why they should visit the destination. The existence of strongly held, favourably evaluated associations that are unique to the brand and imply superiority over other brands is critical for the brand's success (Keller, 1998: 116). The strength of attributes and benefits of a brand must be evaluated to assess their potential for sustaining competitive advantage. Attributes and benefits that are strengths must be scrutinised for their uniqueness because sustainable competitive advantage can only be achieved through features that are unique to a brand. Claiming that Cape Town is beautiful, for example, does not contribute anything meaningful to the visitor as he or she might have visited destinations that have similar features. Yet claiming that Cape Town is a land of contrast, for example, is a more sustainable proposition because it reflects reality and differentiates the destination. This research will determine the uniqueness of attributes and benefits that can sustain competitive advantage for Cape Town.

## **2.5.7 LEVERAGING SECONDARY ASSOCIATIONS**

Brand associations may themselves be linked to other entities that have their own associations, creating secondary brand associations. Because the brand becomes identified with another entity, even though this entity may not directly relate to the product or service, consumers may infer that the brand shares associations with that entity. In essence the marketer is borrowing or leveraging some other associations for another brand to create some associations of its own and thus help to build its brand equity (Keller, 1998: 74). For example, Western Cape is strongly linked to wine and fruits and brands such as 'Cape Wine' and 'Cape Fruits' are relatively well known. Consequently, consumers who are aware of those two brands are more likely to relate some attributes of those brands to brand Cape Town or vice versa. These secondary associations may lead to the transfer of some positive attitude or credibility, attributes and benefits to the brand. The converse is also true, any negative associations is likely to be transferred to a brand.

Secondary brand associations may be quite important if existing brand associations are deficient in some way. Three factors are important in predicting the extent of leverage that might result from linking the brand to another entity in some manner (Keller, 1998: 269).

- Awareness and knowledge of the entity
- Meaningfulness of the entity's associations
- Transferability of the entity's associations

The inferencing process will depend largely on the strength of linkage or connection in consumers' minds between the brand and other entity. The more consumers see fit or similarity of the entity to the brand, the more likely it is that consumers will infer similar associations to the brand (Keller, 1998: 270). Yet secondary brand associations may be risky because some control of the brand image is given up. A success story of a country or brand that was able to leverage secondary associations effectively, for example, is New Zealand. New Zealand set out to create 'The New Zealand Way' (NZW) brand in order to build a strong national umbrella brand that added value to the marketing of New Zealand products and services. The NZW brand was to position a broad range of the country's tourism and trade products and services at the forefront of world markets. The eventual associations that were created as a result of the marketing campaign were quality, excellence, environmental responsibility, contemporary values, achievement, honesty, integrity, and openness (Keller, 1998: 281).

### **2.5.7.1 DESTINATION SUPRA-BRANDS**

Secondary associations are particularly important for tourist destinations because a city or region exists within the confines of a country. Cape Town exists within the Western Cape and South Africa. Any positive or negative associations with those places are likely to be transferred to brand Cape Town. In fact, it has been emphasised in the destination marketing literature that associations with a supra-brand affect perceptions of the sub-brands. A supra-brand is defined as a country brand, for example, South Africa or Britain. All sub-brands such as Cape Town or London exist within the supra-brands. Much attention is currently focused on trying to develop South Africa as a brand, and not just for tourism. Government and others are concerned about the negative perceptions of South Africa- and perceptions are a key part of how brands are received. Hence the damage when South Africa's leaders take ill-advised stands on matters such as AIDS or Zimbabwe tend to compound the older negative perceptions. The question to ask is whether brand Cape Town really wants to leverage secondary associations with brand South Africa at this point in time (Addison, 2001). It makes no marketing sense to do so now but once the rebranding of South Africa has been implemented, it will be crucial for all sub-brands to work in tandem with the supra-brand to achieve consistency in image and communication.

Also, it needs to be pointed out that sub-brands are often viewed more positively than supra-brands. For example, Cape Town is perceived in a more positive light than South Africa. Similarly, London is perceived more favourably than Britain. Britain as a destination supra-brand has been faced with the dilemma as whether to promote itself or in conjunction with one of its sub-brands Wales, Scotland, or London. London shares many of the same values of brand Britain whilst, in contrast to the brand values of Britain and London, those of Scotland and Wales are much more elemental, natural and spiritual. Research has also shown that 'England', as an entity, is rather less well known, as it is indistinguishable from Britain and London in the minds of many people. Whilst Britain is an undoubted destination supra-brand, its success in translating its brand benefits and personality into successful and distinctive brand advertising has been rather mixed. Some of its sub-brands such as Wales and Scotland have been developing much stronger consistent, coherent and effective brand propositions (Morgan and Pritchard, 2000: 239).

In the same way, Cape Town has done a better job than South Africa in marketing itself to international visitors. Brand Cape Town has a higher awareness among travellers than supra-brand South Africa. Yet for both to be successful, a highly integrated approach must be adopted whereby the country's brand personality is consistently projected at the macro level in all the key target markets, and its sub-brands

whether it be cities, regions or provinces echo but embroider in more detail, the same consistent themes in their advertising messages. Supra-brand Britain has failed miserably in achieving consistency. Its advertising and promotion campaign 'Cool Britannia' focused largely on the rational benefits associated with Britain. They tried to pack in virtually every aspect of Britain's product, from its tradition, heritage and pageantry to its landscape, attractions and culture. The end execution appeared more as a composite picture or amalgam of what Britain had to offer – almost overwhelming the potential tourist with images – rather than a total brand positioning which personified the rational and emotional benefits of this destination supra-brand (Morgan and Pritchard, 2000: 239).

On the other hand, an example of a very successful supra-brand is Spain where 'España' is the main brand and its cities such as Barcelona, Madrid and regions such as Andalusia and Galicia have become second-level brands. At the country level, Spain has remained remarkably constant in its advertising with each campaign promoting the diversity and variety of the country (Morgan and Pritchard, 2000: 289). Australia has done the same, where each individual tourism region such as Western Australia and cities such as Sydney are pursuing an integrated sub-branding strategy that synergises with brand Australia (Crockett and Wood, 1999: 279). Cape Town and Western Cape, Durban and KwaZulu Natal must follow a similar approach. In fact, the province of KwaZulu-Natal has been quite successful in its branding initiative. Though, the brand - The Kingdom of the Zulu- does not yet exist in most people's minds, the concept and process used to brand the province must theoretically lead to its success. The imagery that the tourism authority has used is one that includes the Zulu monarchy and its cultural identity, which is perhaps the province's strongest unique attribute. Zulu imagery already occupies a position in the minds of travellers and is potentially a global tourism brand. The brand values include world-class status, richness of experience, diversity, stability, a welcoming and hospitable environment, and a suggestion of excellent value (George, 2001: 304).

### **2.5.8 EMOTIONAL BRANDING**

While it is theoretically true that places evoke all sorts of emotional experiences, it is difficult for a marketer to provide an image such as relaxation, pleasantness, a challenging experience or something inspirational that would be interpreted in the same way by all potential visitors (Nickerson and Moisey, 1999: 218). It is believed that each consumer will potentially have a different emotional response to the same feature. Gobe (2001) is of the opinion that the difference between a brand and a successful brand is the personal connection that successful brands have with consumers through the strength of their culture and the uniqueness of their brand imagery. The tourism industry today needs to bring people the products they

desire, exactly when they want them, through venues that are both inspiring and intimately responsive to their needs. Emotional branding is a means of creating that personal dialogue with consumers. Consumers today expect their brands to know them intimately and individually with a solid understanding of their needs and cultural orientation (Gobe, 2001).

Emotional branding has also been labelled as mood-brand marketing where branding activities concentrate on conveying the essence or spirit of a destination, often communicated via few key attributes and associations (Morgan and Pritchard, 2000: 282). It is a useful method of destination branding where brand saliency is created through the development of an emotional relationship with the consumer through highly choreographed and focused communication campaigns. To successfully create an emotional attachment, a destination brand has to be:

- Credible
- Deliverable
- Differentiating
- Conveying powerful ideas
- Enthusing for trade partners
- Resonating with the consumer (Morgan and Pritchard, 2000: 281)

However, as Westwood et al. (1999: 240) argue, mere emotion is not enough, the key to develop a strong brand is the unique associations that customers hold in memory. While emotion has always been an important component of branding, emotion in the absence of a point of difference that can be articulated and firmly positioned in the memory is arguably a recipe for consumer confusion.

### **2.5.9 MEASURING BRAND IMAGE**

There are various research techniques to measure images, attitudes and perceptions which people hold of particular brands or products. However, the very nature of these constructs makes it difficult to accurately measure and quantify. Yet accurate measurement is essential as marketing strategies for destinations are often based on such research findings. Morgan and Pritchard (2000: 109) suggest the use of projective techniques to construct a comprehensive analysis of the overall image, strengths and weaknesses of a destination. They used the following four key measures to establish UK visitors perceptions of the Las Vegas brand.

### **2.5.9.1 DESTINATION SALIENCY**

Destination saliency provides a measure of how emotionally close an individual feels to a destination. A measure of saliency is important in order to determine for example, how relevant Cape Town is to international travellers or how potential visitors view brand Cape Town. Destination saliency can be measured by exploring respondents' top-of-the-mind associations with a destination. For example, top-of-the-mind associations with Las Vegas were centred on adult product, gambling, sex, Mafia-connections, and entertainment. There were also glamorous overtones of limousines, champagne and glittering nightlife (Morgan and Pritchard, 2000: 110). A similar measure will be used for brand Cape Town.

### **2.5.9.2 USER AND PRODUCT IMAGERY**

Investigations of user imagery help to establish how well respondents identify with a destination by establishing respondents' perceptions of the typical vacation visitor to that place. Product imagery reflects what respondents would expect to find in terms of accommodation, attractions, entertainment and environment. The use of word association or sentence completion is of particular importance in establishing product imagery. Such techniques reveal images, feelings and associations that respondents hold of particular destinations and their competitors. These techniques will have to be employed in assessing the brand image of Cape Town.

### **2.5.9.3 BRAND FINGERPRINTING**

Brand fingerprinting investigates the respondents' experience of, and their relationship with a brand. It examines the thoughts and feelings held about a brand and its competitors through the senses (sights, sounds, smells, tastes, touch and feelings). Respondents are asked to describe in detail their images and impressions of the destination under consideration (Morgan and Pritchard, 2000: 111). Las Vegas fingerprint for example, showed the following:

- **Sights**

Bright neon lights and dark skies, limousines, showy clothes and make up, sparkling diamonds, and smog.

- **Sounds**

Loud music, traffic, gaming machines and roulette wheels, last bet calls, people and many languages.

- **Smells**

Perfume, alcohol, smoke, food, cars, pollution, dirty and sweat.

- **Taste**

US fast-food, steak, ribs, meat, cosmopolitan food, alcohol, cigarettes, and Coca-Cola.

- **Touch**

Money, metal, and heat.

- **Feelings**

Overwhelmed, frantic, surprised, amused, happy, exhilarated, adrenaline, guilt, fear, loneliness and distaste.

A similar concept will be applied to the qualitative research component of this thesis. Projective techniques used to measure destination image will also be included.

#### **2.5.9.4 BRAND PERSONALITY ANALYSIS**

Respondents are asked to describe a brand as if it was to come to life as a person. It reflects how people feel about a brand rather than what they think the brand is or does (Keller, 1998: 97). The personality of a brand is both distinctive and enduring. It is the core identity of the brand. Aaker (1996) defines core identity as being the central timeless essence of the brand and it remains constant as the brand travels to new markets. The brand essence of Wales, for example, centres around 'natural revival', conveying that Wales's unspoilt and beautiful landscape offers tourists the physical and spiritual renewal so needed in today's hectic society (Morgan and Pritchard, 2001: 175). The strength of a brand lies in its capacity to remain true to its core personality or purpose irrespective of the target audiences or mode of communication (Crockett and Wood, 1999: 281). The core personality of brand Western Australia for example, is being fresh, natural, spirited and free. Another example is the brand personality of Scotland that reflects traits such as straight, open, honest, ethical, educated, very competent, warm, welcoming, friendly, very accessible, with distinctive voices and names, and very distinctive attitudes (Hamilton, 2000).

Also, some personality traits are dependent on community attitudes. For Western Australia, one such trait is the quality of service delivered by the tourism product and the general 'friendly and welcoming' appeal of the state. This is one way of image marketing as suggested by Kotler et al. (1993) where the attitude of residents towards visitors is a strength and differentiating factor for a brand. The brand personality of Cape Town is relatively unknown and this research will try to determine the characteristics and values of the brand.

## **2.6 DESTINATION POSITIONING**

Branding refers to what images people have of a country, city or region and what kind of relationship they have with it while positioning on the other hand, takes the images and define the city, region or country by showing how it compares to competitors (Nickerson and Moisey, 1999: 217). Destination marketers recognise that the image of their product or brand in the consumer's mind, how it is positioned, is of more importance to ultimate success of a destination than its actual characteristics. Destination marketers try to position their brand so that they are perceived by the consumer to occupy a niche in the marketplace occupied by no other brand. They try to differentiate their product by stressing attributes they claim will match the target market's needs more closely than other brands and then try to create a brand image consistent with the perceived self-image of the targeted consumer segment. As such, they appeal to consumers' values and self-image and in doing so they are thereby appealing to the powerful discourses which have shaped those self-same values and images (Morgan and Pritchard, 1998). Such is the power of positioning that it has been described as the essence of the marketing mix, embodying the concept or essence of the product or destination (Kotler et al., 1993). It therefore conveys how the destination will satisfy a consumer need and different consumer meanings can be assigned to the same place via different images. In this way a place can be positioned differently to simultaneously appeal to different market segments and it can subsequently be repositioned for the same or a different audience in the later phases of its destination life cycle.

Given that the destination experience is often an amalgam of various services provided by tourism suppliers, it can be argued that positioning a destination is a difficult task. Positioning services involve developing and communicating key service attributes that are consistent with the brand image. It is a stage subsequent to market segmentation at which the marketer determines the needs that are best satisfied by the destination product/service offerings and how best to communicate the offering to the target market. Positioning a destination is concerned with three issues: the segmentation decision, image and selection of a destination's features to emphasise (Aaker and Shansby, 1982). Then the key to successful positioning is to match the benefits provided by a destination with the benefits sought by a particular target market considering that destination.

Positioning a destination has a number of challenges, two of which are inherent in marketing a service, namely intangibility and inseparability. Intangibility leads to consumer uncertainty. The destination marketer

is effectively selling an experience (Ryan, 1995: 40). The tourist has a degree of control over the purchase, in that he can dictate his level of involvement with different elements of the service, for example, destination attributes, activities and people. In this way the tourism purchase differs from, say, a retail service situation and enables the tourist to maintain a more equitable balance in his level of cognitive dissonance (Alford, 1998: 56). Because of the intangible nature of a destination, an explicit positioning strategy is valuable in helping prospective visitors to get a 'mental fix' on it that may otherwise be amorphous (Lovelock, 1991). For example, the Northwest region of England offers a wide range of tourist experiences – major cities, upland and lowland countryside, historic towns and villages, seaside resorts and undeveloped coastline. How does the tourist board communicate such a diverse product to the visitor? The North-West Tourist Board strategy outlines that the product is too diverse to be marketed as one entity and therefore they market each product and theme but ensure that the brand image is consistent (Alford, 1998: 56). Similarly, it could be argued that tour operators face the same problem of how to market a destination. For example, Thompson tours is a major player in the South African inbound tourist market, when a customer books a holiday to SA, he is effectively buying a clearly defined Thompson product. The reality is that little of SA is actually being marketed to the customer. The customer is primarily buying an identifiable branded product.

The second challenge relates to the inseparability of the production and consumption processes. This can result in inconsistencies in the quality of the product and its delivery. The high level of human involvement in the production and delivery processes compounds this potential for inconsistency. The multitude and diversity of tourism suppliers in the destination makes quality control and cohesion a difficult task (Alford, 1998: 57). Many of the suppliers are small to medium sized enterprises, often family run and with little formal training. The role of local and region tourism boards should be to provide training, information and advice. The quality of the experience can thus be controlled through grading and classification. Tour operators on the other hand, exercise high degree of control over their suppliers and therefore over the customer's holiday experience. This enables them to deliver a more consistent product.

Brand positioning analysis reviews information to determine the desired brand awareness and brand image. Arriving at a positioning for a brand requires decisions in four areas: **target market**, **nature of competition**, **point of parity associations**, and **point of difference associations** (Keller, 1998). Alford (1998: 55) went further to say that to position a destination successfully the following steps must be followed. The marketer must first research the market to ascertain which product attributes determine destination choice. Based on realistic strengths and weaknesses assessment of the destination and its

competitors, the decision can then be made as to which market segments to target and with which products. Kotler et al. (1993: 85) warns about the potential pitfall of using the strengths of a destination to position it. The concept of strength must be carefully interpreted for each destination. Although a place may have a major strength, that is, a distinctive competence, that strength does not necessarily constitute a competitive advantage. First, it may not be an attribute of any importance to the target market. Second, even if it is, competitors may have the same strength level on that attribute. What becomes important, then, is for the place to have greater relative strength on an attribute important to a target group. Finally, distribution, pricing and communication strategies progress naturally from clear product positioning.

One of the objectives of the JMI is to design an inspiring, differentiated and deliverable positioning for the Cape. The positioning statement will have to:

- Capture a sense of the city and province and their offerings as a whole.
- Be bought into, by all the key stakeholders.
- Not just be a reflection of reality, but be future orientated and provide a clear and inspiring strategic vision of what the Cape should stand for in the long term.
- Be substantiated by the city and province and their features.
- Be delivered consistently over time and geographic spread, with specific executions and elements working in synergy (Cape JMI, 2001).

Clearly these suggestions will have to appeal to the most important stakeholders which are the tourists themselves. Their perception of the brand is more important. Thus a great brand positioning will require an in-depth understanding of the various target audiences.

## **2.6.1 TARGET MARKET**

A destination needs to clearly define its target markets to fine-tune its product offering. Tourists, for example, have not been going to China to visit a Disneyland or for the beaches or nightlife. The major attraction of China as a tourist destination, has been its rich inheritance from 5000 years of civilisation. These features include stunning structures such as the Great Wall, stretching 6000km, the Temple of Heaven at Peking, the Terracotta Army of Emperor Qin Shi Huang at Xi'an and many other remains and points of interest scattered along the length and breadth of the country. Tourists could make many visits without repeating the same itinerary. The vast wealth of buildings, artefacts, structures and scenery is embedded in a culture that is one of the most ancient and unique in the world (Lavery, 1989: 78). The

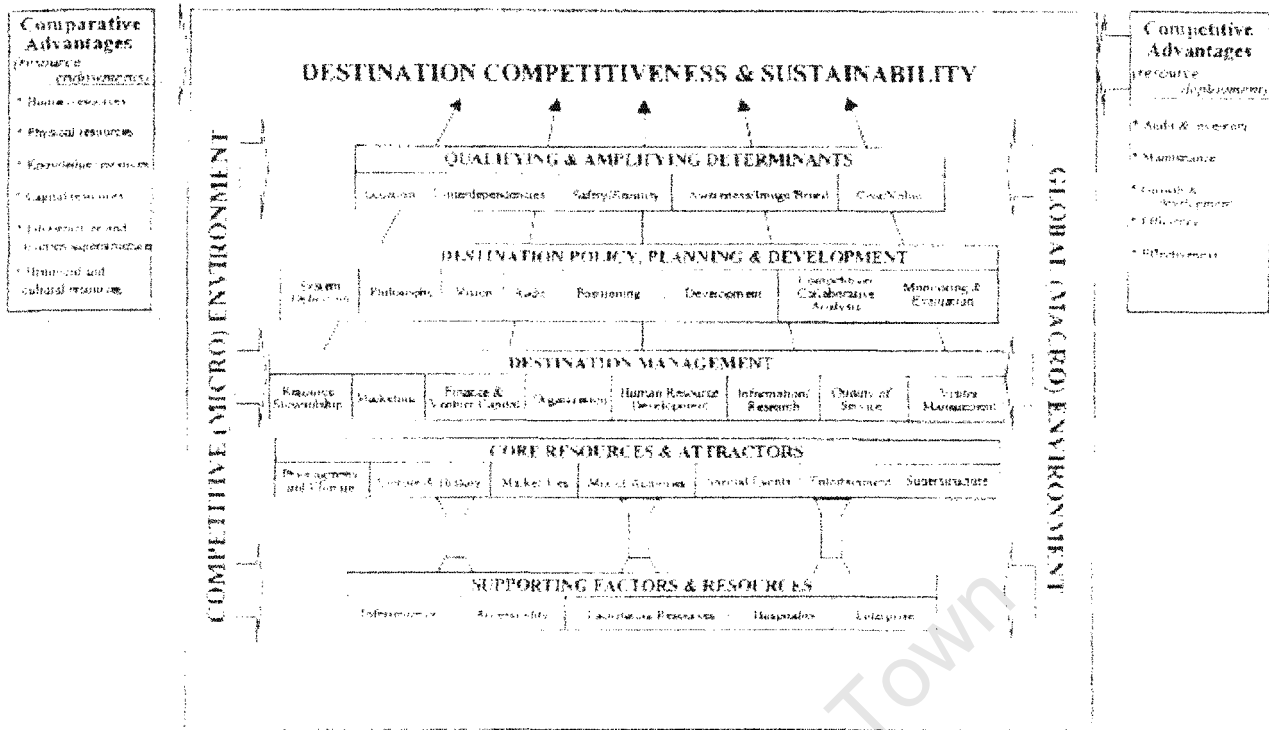
country knows exactly what it has to offer and which segments of the market it will appeal to. Cape Town must follow a similar approach where the needs of each market are understood and brand positioning tries to match those needs with the product offered.

## **2.6.2 NATURE OF COMPETITION**

Positioning is about how a brand can satisfy the needs of a consumer better than its competitors. The competitiveness of a destination and how the destination differentiates itself from competitors will determine how consumers perceive it. Optimal positioning of brand Cape Town therefore requires an understanding of how competitive is the destination product vis-à-vis direct and indirect competitors and how the brand can be differentiated to sustain competitive advantage. Positioning is a process of pinpointing, substantiating and delivering competitive advantage to create brand growth (Cape JMI, 2001). It provides a focus and mechanism for making choices, which improve the effectiveness of external marketing activity and guides internal development of the brand.

### **2.6.2.1 DESTINATION COMPETITIVENESS**

Go and Govers (2000: 79) suggest that due to the effects of globalisation, competition in tourism has shifted from inter-firm competition to competition between destinations. This does not mean that competition is minimal between airlines, tour operators, hotels and other tourism services, but that inter-enterprise competition is dependent largely upon and derived from choices tourists make between alternative destinations. A number of frameworks have been proposed in the literature on destination competitiveness but the single most comprehensive one was developed by Ritchie and Crouch (2000) as shown in **Figure 6**. The model covers the entire range of factors affecting the competitiveness of destinations. It draws from the research of several authors such as Bordas (1991a), Ritchie and Crouch (1993), Goeldner, Ritchie and MacIntosh (2000). The model highlights that it is a combination of all factors comprising the competitiveness of destinations as well as synergies between these elements that determine the attractiveness of a region. Consumers may be willing to compromise some elements for some others, for example overcrowding for cheaper price. Ultimately, the competitiveness of destination depends on their ability to maximise the performance for each individual element assessed (Buhalis, 2000: 106).



Source: Ritchie and Crouch (2000)

**Figure 6:** Destination Competitiveness and Sustainability

The framework explains that the prosperity of a destination is dependent on the competitiveness of all economic sectors as well as the competitiveness of tourism. The microenvironment and the macro environment have much of an impact on every single element of the model. However, the model fails to rate the importance of each element examined. It is suggested that a dissimilar rating should be adopted by different destinations depending on the types of markets they attract, their life cycle stage and specific characteristics (Buhalis, 2000: 106). Nevertheless, the model contributes to the comprehensiveness and wideness of elements that need to be taken in consideration when marketing a destination.

Bordas (1994a: 3) argues that it is inappropriate to talk about the competitiveness of a destination but rather the competitiveness of certain tourist products of a particular destination in certain specific tourist businesses. In the majority of cases these tourist businesses are located in very specific geographic areas or clusters. A cluster is a group of tourist attractions, infrastructure, equipment, services and organisation concentrated in a delimited geographical area. For this reason true competitiveness is not established between countries but between clusters and tourist businesses. For example, Argentina does not compete

with Uruguay, however Mar del Plata does compete with Punta del Este. Spain and Greece are not in competition, but the Balearic islands do compete with the Aegean Islands.

Given that competitiveness is established in clusters and tourist businesses, marketing activities should begin with reinforcement of clusters and ending with their integration on a national scale (Bordas, 1994a: 4). The different marketing plans of each cluster must be integrated on higher levels of region, destination or country, in function to its administrative structure. This process of integration has to be carried out in such a way that the final result clearly specifies what each of the many implicated parts must do. Thus a place can position itself in regional, national, and international terms as the place for a certain type of activity or as a viable alternative location/attraction to another place that may have a stronger or more well established position (Kotler et al., 1993: 153). Cape Town for example can position itself either as an adventure packed destination or as a place to relax and unwind from a stressful lifestyle.

Furthermore, competing in the long-haul market has important implications on its own for Cape Town. It implies that the country is situated far from major generating markets such as Europe and the US. The biggest travel expenditure to be incurred by visitors is transport to and from the destination, and thus can determine the willingness and ability of travellers to visit destinations. Increasingly consumers are unimpressed by tourism facilities and products, as they have travelled extensively and have acquired a wealth of experiences. Global competition and oversupply, as well as the emergence of new destinations in third world countries with lower labour costs, generate frequent price wars especially for constrained capacity at the last minute. As a result, consumers are increasingly prepared to pay less for getting more (Buhalis, 2000: 110). The distance factor leads to greater cost (economic, physical, and psychological). The greater cost has to be compensated with greater value or benefits. By ensuring a reasonable level of functional benefits, a competitive advantage will be gained by adding symbolic and existential benefits perceived by the consumer (Bordas, 1994a: 5). This implies that long haul destinations have to provide good value for money in the first place to get consumers attention and then offer greater benefits than countries that are geographically nearer to major generating markets, to induce them to visit.

The destination has to offer greater benefits such as quality experience and unique product attributes/value to get customer's patronage of the destination. Quality is viewed as a positive distinguishing characteristic, which according to Berry and Parasuraman (1991) is '*the foundation for services marketing because the core product (destination) being marketed is a performance.*' As a critical issue, experience quality deserves a comprehensive

approach and definitive integration amongst its key stakeholders' (residents, visitors, and trade) and in-depth knowledge of their needs and expectations. Implicit and explicit tourist experiences need to be matched with destination features and private and public sector practices (Go and Govers, 2000: 80). It must be realised that customer interaction takes place over million moments of truth. Each moment of truth encountered with the destination environment and its service infrastructure becomes a thread woven into the traveller's overall sense of trip quality. Indeed the more positive those encounters are the stronger the sense of quality. Value can be seen as combination of a product's (destination) perceived quality and associated price, which a visitor will summarise as the value received. Creating traveller perceptions of quality or value is a complicated task as these experiences are intangible. Further to this, understanding the role of the destination in generating these types of experiences has been complicated by different understandings and past debate over the nature of the destination product itself (Murphy et al., 2000: 44).

Murphy et al (2000) confirm that destination products that do not meet tourist quality expectations are less likely to be revisited than those that satisfy. Perceived value is also thought to be a significant determinant of whether a visitor would intend to return and visit a destination again. Their study supports the need for destination marketers to actively manage the mix of restaurants, attractions, hotels and other infrastructure to develop a consistent destination image for different target segments. It illustrates the importance of destinations and their tourist associations agreeing on what aspects of the region to promote to what markets. But this is not an easy task in communities which often have a variety of opinions on what should be developed and promoted for tourism and in an industry which frequently is more competitive than collaborative.

Nevertheless it must be recognised that the match between expectations and reality affects the quality of the visitor's experience. The tourist is visiting discrete destinations linked together by a frequently invisible network of infrastructural services and product marketing. The tourist visit is merely a snapshot in time and the visitor may be frequently unaware of the many issues that are affecting the nature of the environment through which he is travelling. All, however, distinguish between different levels of service and experience quality yet are powerless to affect these during their brief visit (Tyler et al., 1998: 121). It becomes then of paramount importance to create the right impression the first time. The little time that the visitor spends at the destination must be memorable both in terms of tangible and intangible elements of the destination offering. This will generate the much needed word-of-mouth that ensures the long-term survival of any destination.

Thus it can be seen that there is some agreement in the literature on the factors influencing the competitiveness of a destination. However, competitiveness of specific products or combination of products have a significant impact on the competitiveness of a destination. A synergistic relationship exists between the two. This is similar to Porter's (1985) view on the competitiveness of a firm where a firm is competitive up to the extent that its products and services are competitive.

### **2.6.2.2 DESTINATION DIFFERENTIATION**

As mentioned before differentiation can originate from unique tourist attractions, unique tourist activities or unique service levels or a combination of those. Differentiation reinforces a destination's competitive position by making visitors loyal through greater symbolic benefits and reducing the sensibility of the target market with respect to price (Bordas, 1994: 6). Each target market should be treated differently from strategic perspectives and have a separate strategy with its own goals and objectives to pursue. A differentiated marketing strategy aimed at targeting individual markets would help improve the competitiveness of any destination.

In addition, differentiation stems from a unique appeal. Destination appeal refers to the destination attractiveness and deterrents. Attractiveness includes eleven elements: natural features, climate, cultural and social characteristics, general infrastructure, basic services infrastructure, tourism superstructure, access and transport facilities, attitudes towards tourists, cost/price levels, economic and social ties and uniqueness (Mihalic, 2000: 66). Among destination deterrents, Ritchie and Crouch (1993) list security and safety, such as political instability, health and medical concerns, such as poor quality of sanitation, laws and regulations, such as visa requirements and cultural distance. These factors act as a barrier to visiting a given destination.

Of particular importance as a destination attraction is environmental quality of a destination. It has been found to be a prevailing issue in making travel related decisions. It is a competitiveness factor among different destinations with varying environmental quality (Mihalic, 2000: 65). Environmental quality refers to the quality of the natural features of the destination that can be deteriorated by human activities. Natural features like beautiful scenery, clean water, fresh air and species diversity can suffer from pollution and therefore lose their attractiveness (Mihalic, 2000). Quality of natural attractions is a part of quality of a destination. Destination attractions are recognised by Ritchie and Crouch (1993) to be a factor contributing to the competitiveness of a destination. It is important to recognise that it is not the real, but the perceived environmental quality or environmental image that influences the buying decisions of potential visitors.

Image is seldom based on experience or facts (Middleton, 1996: 87). Systematic environmental branding would be a natural way to manage the environmental recognition of the tourism product/destination. An environmental brand would give the customer both environmental information and confidence when purchasing, and would help destination managers to manage the environmental expectation and perceptions of visitors. Such a brand would be part of a family of brands each reflecting different characteristics of a tourism product, connected to the given destination (Mihalic, 2000: 67).

Also, of significant importance is the extent and magnitude of political instability acting as a deterrent to a destination. The extent and magnitude of political instability is a determinant factor for the modulation of the image of destinations in tourist generating countries and in extent the perceived stability and safety of a particular destination in the eyes of prospective holidaymakers (Seddighi et al., 2001: 182). Hall and O'Sullivan (1996) proposed that the creation of a destination image is very much dependent on word-of-mouth, media reporting and government policies and interests. The perceptions held by potential visitors about the relative political instability of a tourist destination have significant influences upon the viability and long-term survival of that destination on the tourism map.

Increasingly distribution channels are supporting and enabling product differentiation by adding value on the product and by contributing to the total brand experience and projecting powerful images (Buhalis, 2000: 111). Developing long-term partnerships with tour operators and leisure travel agencies is therefore extremely significant for the success of leisure destinations. The availability of information on the Internet and the emergence of electronic intermediaries have revolutionised distribution. Destinations that appreciate these new developments and build comprehensive tools for their local suppliers increasingly improve their ability to reach their strategic objectives. Travel and tourism is a very fragmented industry and an information-rich business, which makes it especially receptive for the benefits that the Internet offers (Go and Govers, 2000: 79). The Internet enables consumers to seek information as well as construct and purchase individual itineraries on-line. Not only does it provide opportunities for reducing dependency on traditional intermediaries for remote destinations but it also provides a mechanism to develop and promote specialised products for mini-market segments (Buhalis, 1998). Electronic distribution also offers opportunities for closer interaction and co-operation at the local level. Integration of local resources and organisations enable suppliers at the destination level to develop and deliver seamless tourism products to consumers.

### 2.6.3 POINT-OF-DIFFERENCE ASSOCIATIONS

The goal of destination differentiation is the establishment of point-of-difference associations. These associations are unique to the brand and are also strongly held and favourably evaluated by potential visitors. They can be attributes or benefits or attitudes towards the brand. The more abstract and the higher the level of association, the more likely it is to be a sustained source of competitive advantage. These potential differences should be judged on the basis of desirability and deliverability. With this approach, the emphasis in designing ads is placed on communicating a distinctive, unique product benefit and not on the creative (Keller, 1998: 116). For example, a point of difference association for Cape Town could be its natural beauty and/or cultural diversity but these still need to be researched.

### 2.6.4 POINT-OF-PARITY ASSOCIATIONS

These associations are not necessarily unique but may in fact be shared with other destination brands. Potential visitors view these as being necessary to be a legitimate and credible product offering. For example, value for money is a point of parity association for many emerging destinations. These associations represent necessary but not sufficient conditions for brand choice. Point-of-parity associations also pertain to associations that are designed to negate other destinations' point-of-difference. In other words, if a brand can 'break-even' in those areas where its competitors are trying to find an advantage and can achieve advantages in some other areas, then the brand must be in a strong competitive position. Often the key to positioning is to achieve competitive points of parity with other destinations (Keller, 1998: 117).

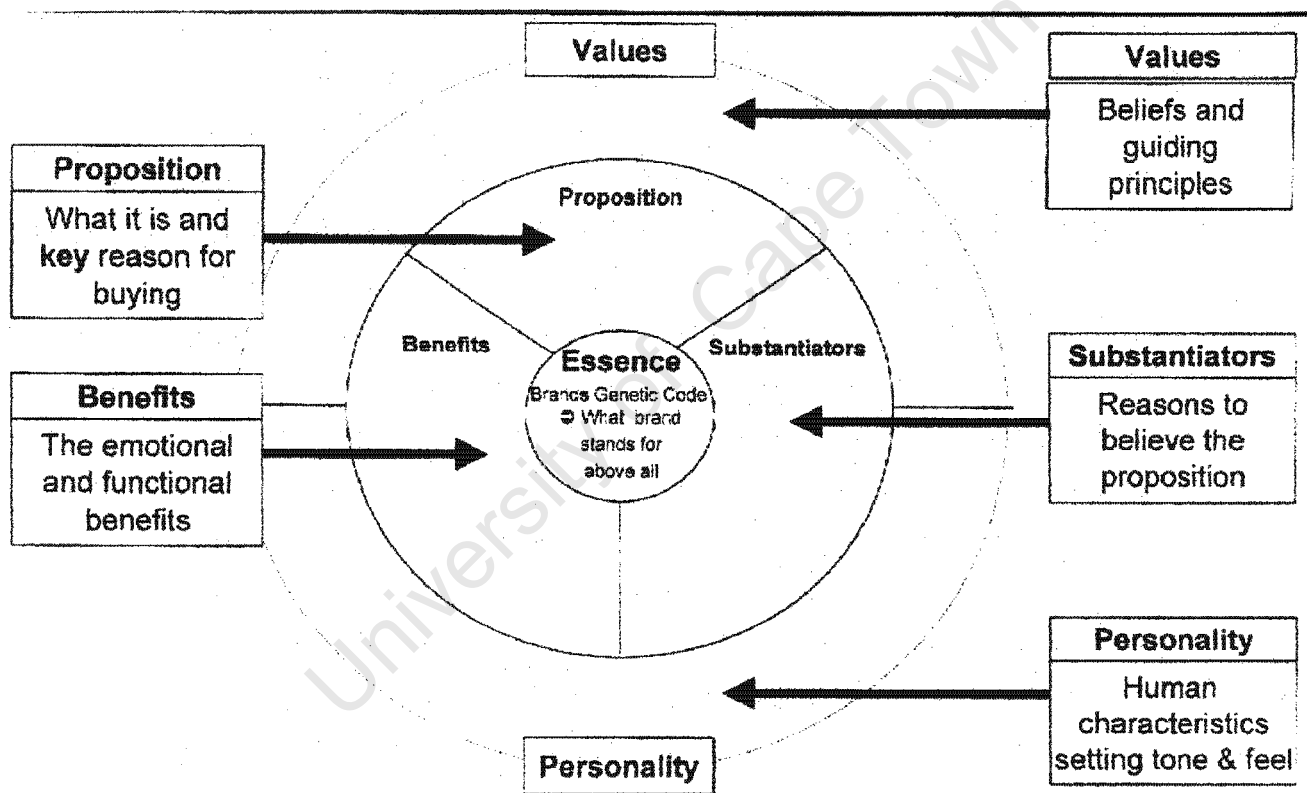
The first two considerations above namely **target market** and **nature of competition** help to define the frame of reference for the brand while the latter two considerations (point-of-parity and point-of-difference associations) help to create the exact location of the brand in consumer minds. Therefore, the essence of brand positioning is that the brand has some sustainable competitive advantage that gives consumers a compelling reason why they should buy the brand. Thus one critical success factor for a brand is that it has some strongly held, favourably evaluated associations that function as points of difference and are unique to the brand and imply superiority over other competing brands. At the same time, it can also be the case that some strongly held, favourably evaluated associations only need to function as points of parity and be seen as about the same as with competing brands for it to influence destination choice (Keller, 1998: 77).

Consistency in marketing is even more crucial for points of parity and differences to be firmly established in the minds of consumers. Consistency does not mean that marketers should avoid making any changes in the marketing program. On the contrary, the opposite can be quite true, being consistent in managing brand equity may require numerous tactical shifts and changes in order to maintain the strategic thrust and direction of the brand. The strategic positioning of many leading brands has remained remarkably consistent over time. A contributing factor to their success is that despite these tactical changes, certain key elements of the marketing program are always retained and continuity has been preserved in brand meaning over time (Keller, 1998: 505).

Also, competitive advantage stems from differentiation achieved by various elements of the destination offering through multiple linkages of various attributes and benefits in a complex and unique way that makes it difficult for competitors to copy. The ambience/atmosphere of a destination is very often key to competitive advantage because many destinations compete on value-for-money, cultural diversity and good amenities. A destination having a different and unique 'vibe' or 'feel' make it difficult for competitors to imitate due to the advantage stemming from various factors uniquely combined to leave a lasting impression on the visitor.

Furthermore, affective associations can be the basis for positioning a destination. Affective associations are the specific feelings (positive and negative) linked with a specific destination considered by the traveller. The mental category a traveller assigns to a destination influence the linking of positive or negative associations with that destination. That is, the affective associations are usually positive for destinations a consumer would consider visiting and negative for destinations a consumer has decided definitely not to visit. The learning of the associations between specific affective concepts, for example, breath-taking scenery, too expensive etc. and a specific destination indicates how the destination is positioned in the consumer's mind. Positioning a destination may occur simultaneously with how it is associated because most individuals find it impossible to make category judgements without also making evaluation judgements (Woodside and Lysonski, 1989: 8). Travellers construct their preferences for alternatives from destination awareness and affective associations. Research by Madrigal and Khale (1994) reveals the importance of personal values in the destination selection process. The data in their research indicates that although demographic differences existed across segments, personal value systems were better predictors of activity preferences. They observe that this information could be used to position a destination in the market place. Promotional themes could connect a destination's activities and attractions with personal values relevant to specific target markets.

In conclusion, destinations must skilfully position themselves to the various publics they want to target. They must adapt their messages to highly differentiated buyers while at the same time developing a core image of what the place basically offers. The place must develop a concept infusing energy, direction, and pride into the place's citizens. It must be a concept that is true of the place, where the conveyed image is congruent to reality (Kotler et al., 1993: 324). Also, as brand Cape Town develops a presence and position in its target markets, it needs to continually extend itself to build on its core personality because as consumers become more familiar with a brand, they seek more detailed knowledge. Consequently brand Cape Town needs to become more complex and multi-layered to maintain its consumer appeal. The brand positioning bullseye model as shown in **Figure 7** below incorporate all the factors that need to be taken into account when positioning a destination or product.



Source: Cape Joint Marketing Initiative (2001)

**Figure 7: Brand Positioning Bullseye Model**

The model shows that the timeless essence of the brand is at the core of brand positioning. The brand essence is supported by brand benefits, propositions and substantiators. These determine the brand values and personality.

## **2.6.5 BRAND BEHAVIOUR**

Adding to the above, one question that remains unanswered so far is why destination image, branding, differentiation and competitiveness are so important for the success of a destination. All these elements contribute to a positive experience of the brand, satisfaction with the destination, which leads to consumers expressing a favourable attitude towards the brand. A favourable attitude translates into positive word-of-mouth, brand loyalty shown by multiple purchase of the destination product and a significant source of positive recommendation to other travellers. Consumers seek brand recommendations from others and limit subsequent information search to only those recommended brands or the recommended brand is used as a standard of comparison to evaluate other subsequently identified brands (Klenosky et al., 1998: 663). Bigne and Zorio (1989) emphasise the importance of satisfaction as a determining element in the destination evaluation and one that affects future decisions. Therefore, if the tourist experiences a high degree of dissatisfaction with the destination, reaching a negative incoherence between the perceived image and the reality of the experience, then he could avoid visiting the same destination again and consider alternative destinations in future decisions. This tourist will communicate his degree of dissatisfaction to other individuals, thus disseminating a negative image about the destination (Andreu et al., 2000: 51).

Research has shown that travel satisfaction evaluations have a strong influence on subsequent travel decisions – allegiance to the brand manifesting in brand loyalty, repeat purchase and recommendations to friends relatives and colleagues (Westwood et al., 1999; Kozak et al., 2000). However, differences between tourism products and other consumer products make it difficult to measure consumer satisfaction in the tourism industry (Kozak and Rimmington, 2000). It is important to identify and measure consumer satisfaction with each component of the destination because consumer satisfaction or dissatisfaction with one component leads to consumer satisfaction or dissatisfaction with the overall destination. The evaluations of attractions and levels of service quality (supply-side) are regarded as crucial in determining overall tourist satisfaction. Satisfaction or dissatisfaction with previous experience is also crucial because it affects expectations for the next purchase. This means that favourable tourist perceptions and attitudes are potentially an important source of competitive advantage.

Also, research has shown that there is a significant relationship between tourists' satisfaction/dissatisfaction and tourists' self-image/destination image congruity (Chon, 1992). Specifically, the greater the congruity between the tourists' self-image and the destination image, the greater the satisfaction (Sirgy and Su, 2000:

343). Tourism managers who understand how self-congruity works may be in a position to develop effective positioning strategies that increase profitability. Consumer research has shown that the matching of the product user image with the consumer's self-concept (Sirgy, 1982) influences a consumer's attitude toward a product. The self-concept is used as a cognitive referent in evaluating symbolic cues. The same can be said in relation to a tourist's attitude toward a destination. That is, tourists perceive destinations differently in terms of the destination's typical clientele or visitors. The greater the match between the destination visitor image and the tourist's self-concept, the more likely that the tourist has a favourable attitude toward the destination and the more likely that the tourist will visit the destination. This matching process is referred to as self-congruity (Sirgy and Su, 2000: 340).

Following the above discussion, it can be concluded that the greater the congruency between the self image of a tourist and the destination image, the greater the likelihood that the destination will be chosen as the next holiday spot. Therefore a proposed model of destination image and destination choice will have to include self-image as a component.

Various situational factors may moderate the extent to which tourists use self-congruity to evaluate various destinations. The relationship between self-congruity and destination patronage, then, is likely to be contingent on a number of situational and tourist characteristics. Factors such as the level of touring experience, touring involvement, time pressure, destination knowledge, and so on may affect the nature of the relationship between self-congruity and destination patronage (Sirgy and Su, 2000: 341). Tourists who are more experienced, for example, may focus on utilitarian based criteria when evaluating destinations whereas tourists who lack experience may focus on holistic, image based cues such as self-congruity (Johar and Sirgy, 1991). Tourism managers targeting consumers with low experience with the destination should avoid the use of informational advertising. The ad campaign should be value expressive instead, that is, appeal to consumers' self-concept (Sirgy and Su, 2000).

Furthermore, customer loyalty has become a key indication of the success of a brand. In consumer research, customer loyalty is often measured by three different indicators, including intention to continue buying the same product, intention to buy more of the same product, and willingness to recommend the product to others (Hepworth and Mateus, 1994). Among tourist behavioural studies, repeat visitation has been used to assess tourists' destination loyalty (Oppermann, 1998; Pritchard and Howard, 1997). Repeat visitation is conceptually similar to two of the three customer loyalty indicators – intention to continue buying and

intention to buy more. However, repeat visitation may not truly represent tourists' loyalty. For example, those who do not return to a particular destination they had previously visited may simply want to seek different travel experiences in new destinations, and yet maintain loyalty to the previously visited destination (Kozak and Rimmington, 2000; Chen and Gursoy, 2001).

Marketers recognise that knowing how to identify, attract, defend and strengthen brand loyalty are the new marketing imperatives (Light, 1994). The emphasis on brand loyalty is the result of the recognition that attracting and keeping customers is closely linked to their ability to differentiate between products and/or services and their conviction that a certain brand will meet their needs better than any other. Therefore destination brand loyalty refers to the ability of a destination to provide visitors with an experience that corresponds to their needs and matches the image that they hold of the destination itself. However, it has been shown that customer satisfaction does not necessarily lead to brand loyalty (Joppe et al., 2001: 252).

In tourist behaviour research, tourist loyalty has been assessed from two conceptual perspectives: one relating to tourist's consumption behaviour (Oppermann, 1998) and one pertaining to tourist's attitude toward product (Pritchard and Howard, 1997). As for tourist's consumption behaviour, repeat purchase is often used as an indicator of tourist loyalty. Because a touristic product, which is tied to total trip experience and novelty, differs from a manufactured product, repeat purchase behaviour might not truly reflect a tourist's loyalty to a touristic product. It may be true that loyal tourists are more inclined to use the same airline and stay in the same franchised hotel wherever they travel; however, the tenet may not be necessarily applied to the selection of travel destinations. According to tourist motivation theory (Iso-Ahola, 1980), tourists tend to either escape from daily routine or seek something new. Therefore, a non-repeat visit behaviour may not preclude an individual's loyalty to a destination they previously visited, while a repeat visitation to a particular destination may not warrant tourists' loyalty to that destination (Chen and Gursoy, 2001).

## **2.7 PROPOSED MODEL OF DESTINATION IMAGE FORMATION AND CHOICE**

Based on the above literature review on destination marketing, image and branding, the author presents the following conceptualisation of destination image formation and choice model. Chon (1990) suggested that a primary image is formed when a tourist has made a decision to travel somewhere. The potential tourist selects certain destinations as possible choices and these initial images are described as primary images. The more favourable is the primary image of a destination, the greater is the likelihood that such a destination will be selected for holiday purposes. For Cape Town, the implications are threefold. Firstly, if Cape Town has an unfavourable image, the destination will not even be considered as a potential holiday base. The recent controversies surrounding the HIV/AIDS issue and the Zimbabwe crisis will undoubtedly affect the primary image of Cape Town as a holiday destination. Secondly, assuming that the primary image of Cape Town is favourable, the likelihood that the city is chosen as a holiday base will be dependent on how differentiated that primary image is compared to other destinations that are being considered. Thirdly, there are still many other factors that will influence the final selection of a destination as a holiday base. A favourable and differentiated primary image will only help the destination to be further selected as a potential holiday base.

Therefore the primary images are evaluated against each other to determine the attractiveness and appeal of the destination based on push and pull factors of a destination. The pull factors are a complex set of factors that influence primary image formation. Pull factors relate to factors such as landscape, climate, cultural attractions, service standards, and pricing amongst others. Cape Town as a holiday destination will be evaluated on each of the above-mentioned factors to determine its attractiveness. A destination that has a reputation of good infrastructure, good value for money and high service quality is more likely to be considered further than a destination that offers sub-standard infrastructure and poor service quality.

Yet one of the most important pull factors is the projected image of the destination that results from destination marketing activities. The projected image serves as a cue to tourists with regards to the destination brand. The projected image conveys to the potential tourist attributes and benefits of the brand. A weak brand will lead to a perception of unfavourable image that result in the rejection of the destination in the earliest stages of the destination choice process. The most significant impacts of destination marketing and branding activities should be achieved at the earliest stage of this choice process. Co-

ordinating the efforts of the various marketing boards in the Western Cape become critical for the success of Cape Town as a brand. The execution of marketing activities by SA Tourism, WCTB, and CMT has to be flawless to ensure that international travellers have the right expectations about the destination.

The push factors on the other hand have been described as 'consumer factors' and relate to motivations, perceptions, psychological and socio-economic characteristics of the tourist. The destination marketer has some control over these factors. Aligning the primary image of the destination to the motivating factors that are influencing the international traveller will increase the likelihood that such a destination is further considered as a potential holiday base. Similarly, perceptions of the international traveller about a destination have to be monitored. Marketing activities need to redress any negative perceptions while reinforcing positive ones. The organic image, which is described as a supply factor, results from tourist exposure to media, word-of-mouth from other tourists, hearsay, and education amongst others. The organic image is formed based on factors other than those related specifically to destination marketing and branding activities. The destination marketer has very little control over the organic image of a destination.

Push factors, which include, projected image of the destination, pull factors and organic image, together influence the formation of the primary images of a destination. These primary images are evaluated against the tourist self image, the better the congruity between primary image and self-image, the likelier the destination will be chosen for holiday purposes. The tourist defines the evoked set of destinations as the ones where primary images are congruent with self-image. Those destinations that have different primary images to that of the tourist's self images are discarded as potential holiday destinations. The destinations forming part of the evoked set are further scrutinised to assess their suitability as a potential holiday base. Three dimensions are considered namely need satisfaction, social agreement and travelability as suggested by Um and Crompton (1992). The final choice of a destination is made based on how well the selected destination rates against these three dimensions. The visitation then takes place and the tourist evaluates the primary image against the actual image of the destination. The marketer articulated destination brand becomes a customer experienced brand. This comparison results in a complex image and is described as being a realistic, objective and differentiated image of a destination. The complex image affects brand behaviour. The more favourable the complex image the more likely the tourist will have a favourable overall image of the destination and in turn this will influence repeat visits, positive word-of-mouth and recommendation to others. **Figure 8** depicts the above conceptualisation in a diagrammatic format.

The relevance of the model is based on its applicability to any destination. Almost all destinations go through the same process of evaluation and scrutinisation before being chosen as a holiday base. Taking Cape Town as an example, the primary image of the city has to be favourable and differentiated to be further considered as a potential holiday base. The challenge remains for the city to be positioned in such a way that the self-image of the target market is congruent to primary image. This will be achieved when destination marketing and branding activities are flawless and aligned with push factors that influence the choice a destination. Thereafter aligning what Cape Town has to offer with factors such as need satisfaction, travelability and social agreement will determine whether the potential tourist selects the destination as the final holiday base. Nevertheless, the actual experience of the destination will determine the extent of the complex image of Cape Town. This in turn will influence future behaviour towards the brand.

This model serves as a guideline for understanding the destination image formation process in the mind of the potential visitor and the resulting destination choice. The model is based on qualitative research only and some components will be tested empirically to prove their reliability and validity. The importance of push factors in destination choice will be measured qualitatively through in-depth interviews and quantitatively through the survey instrument. The primary image of Cape Town will be assessed through in-depth interviews with international tourists while factors that contributed to the final choice of the city as a holiday destination will be measured in the empirical study.

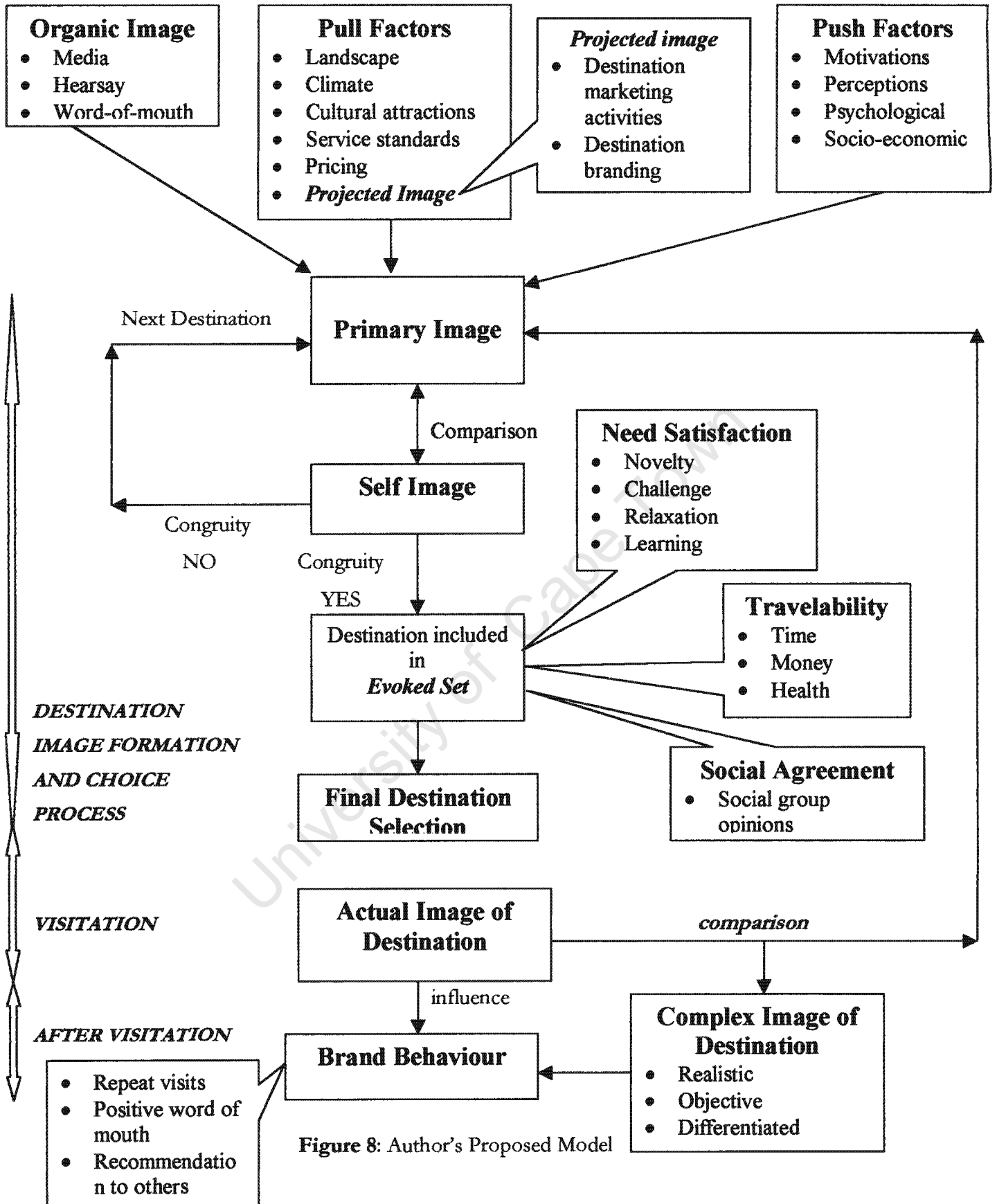


Figure 8: Author's Proposed Model

## 2.8 LITERATURE REVIEW CONCLUSIONS

Based on the above literature review the following conclusions can be drawn.

### 2.8.1 DESTINATION MARKETING

- Destination marketing can only succeed through co-operation between the private and public sector where roles and responsibilities of each are clearly defined. A set of focused strategies that incorporates the needs of all stakeholders is needed to gain their support. This can be achieved through a flexible framework that guides tourism development.
- An institutional or umbrella marketing program is needed at the provincial or country level that provides a framework within which the individual (local) destinations and attractions can feature their own brand. The overall goal being consistency in message and image projection.
- A destination product is too diverse to have one marketing campaign to promote the 'product'. There are too many components and individual suppliers of those components. Thus, it requires an integrated effort on part of all suppliers to market the loosely defined product effectively and consistently. Each market should be targeted with the products that satisfy most effectively travellers' needs.
- A destination marketer having minimal control over customers' experience of the product should facilitate consumers choice of the bundle of benefits and experiences most appropriate to their needs and wants. Rigidly packaged tours are thus outdated, the customer requires flexibility in choosing which components of the product or experience he wants to enjoy.
- Tourism planning is critical for the success of a destination. Clearly co-ordinated and focused strategies on each target market will ensure that needs of potential visitors are understood. These can then translate into future tourism policies and developments in the destination country. Integrating quality of life objectives with tourism development is a winning formula for any destination.
- For destination marketing to be a success, requires a fusion of marketing mix and destination mix elements. However, often this is not the case because marketing mix elements fall under the control of individual suppliers that may not necessarily agree with destination marketing agencies on how to price

and market their products. Achievement of consensus based on mutual understanding rather than power driven decisions can ensure image and message consistency.

- The complexity of relationships with local stakeholders can undermine success of destination if there is no co-ordination of efforts. This is even more pronounced nowadays due to increasing competition among emerging destinations. Value for money is one of the fundamentals that destination marketers must get right to attract visitors.
- Accountability is key to make tourism planning easier and to establish a clear image of the destination. The supra-brand and sub-brands must be clearly defined while organisations marketing the former and latter must be accountable for their actions. All stakeholders must pool resources together for a destination to be successful.
- Tourism development has economic, socio-cultural and environmental impacts on a destination, which in turn affect local residents. Thus, local residents must be an integral part of the development process. Communities can only benefit from tourism if there is synergy between quality of life objectives and tourism development.

## **2.8.2 DESTINATION CHOICE**

- Destination choice is dependent on the positiveness or negativeness of perceptions of potential visitors towards a destination. There are a number of important factors such as natural environment, infrastructure, image, and safety that influence destination choice.
- The fundamentals of destination choice rest in satisfaction of needs for tourists such as a need for relaxation or excitement or novelty. Social agreement, which refers to, what social groups think of the destination influence destination choice. Yet travelability factors such as time, income and health determine whether the consumer can actually travel. All these influences on destination choice make it difficult to pinpoint the most important factor when choosing a destination.

- The endless list of factors influencing destination choice is further complicated by potential visitors having a different set of factors for each destination considered. Yet some consumers display no particular rationale for choosing a destination besides the novelty or curiosity factor.
- Repeat visitors have a different set of factors than first-time visitors when choosing a destination. Repeat visitors have first hand experience with the destination product and therefore have clear expectations. However, first time visitors are unsure of what to expect and they rely predominantly on image and word-of-mouth to make their choice.
- Destination choice is the result of a congruity between three factors namely destination attributes, destination image and self-image. The potential visitor evaluates and compares the destination attributes and image with his or her self-image. The greater the congruity, the greater the likelihood that the destination is chosen for holiday purposes.

### **2.8.3 INFORMATION SEARCH BEHAVIOUR**

- Information search behaviour can be used as a segmentation tool. Consumers place varied level of importance on sources of information that are more likely to influence their decision to visit a particular place. Therefore communication strategies must be focused on the sources most frequently used by the targeted consumers.
- Information availability and quality influence consumers' perceptions of a destination. These perceptions in turn affect destination choice. Consumers tend to rely more on informal sources of information in the final stages of their decision making process while formal sources are mostly used at the beginning of their search for a holiday destination.
- A web presence is not enough to entice consumers to choose a destination as a potential holiday base. Synergy is required between both on-line and off-line information sources to project a consistent message and image. A web presence provides a unique opportunity to tailor information to customer needs and pull together the information provided by various suppliers under one website. This is a potential source of differentiation for a destination as it makes it easier for potential visitors to look for information.

## **2.8.4 DESTINATION IMAGE**

- Image has been defined and interpreted by various authors in a different way. Yet some consistency in the definition and interpretation of destination image has been achieved. It certainly involves an amalgam of products, services and experiences woven into a total impression. This image forms the basis of the brand, which is perceived as comprising of a collection of suppliers and services. The performance of each and every supplier therefore affects perceptions of the brand. Managing these millions of moment of truths make the control of the destination experience a difficult task.
- Destination image affects destination choice. Consumers tend to evaluate destinations on their projected images. Destinations with positive images are more likely to be considered for holiday purposes than those with negative ones. The threat of political instability, crime and violence are major deterrents to even consider a destination as a potential holiday base.
- Destination image has both cognitive and affective components. The cognitive components are usually an evaluation of the destination attributes. Destinations have been traditionally marketed in terms of their specific tourist attributes. While the affective components refer to emotions conveyed by those attributes. Thus destination image affects behaviour and attitude.
- Destination image promotion should begin with an understanding of the push or pull orientation of potential tourists. Push orientation of tourists referring to the attractiveness of a destination based largely on its projected images. These images are subject to various interpretations by potential visitors. The pull orientation referring to the basic needs and motivations of potential visitors to travel.
- Destination image is shaped by cultural and political discourses influencing a country at a particular point in time. However, the prevailing cultural values in a country have more of an impact on destination image than anything else. Destination marketers must try to limit political influences on destination image, as they might not always be in the long-term interest of a destination.
- Destination image is multi-faceted and multi-dimensional. Each individual perceives the same place differently. There is no single perceived image but there can be only one projected image that

differentiates the destination from others. Thus destination image is subjective, temporally and culturally specific.

- Socio-demographic characteristics of travellers have a significant impact on image perceptions and travel experience perceptions. The more positive the perceptions of both, the more positive are purchase decisions and the more preferred the destination will tend to be. The perceived image does not always have to coincide with reality though.
- Destination image must be measured using both structured and unstructured methodologies. Structured methodologies focusing on destination attributes (functional components) while unstructured methodologies capturing the affective and evaluative components of destination image. These are important to design the most effective positioning, differentiation and marketing strategies for a destination.
- The extent to which a destination is associated with distinctive or unique characteristics can provide a useful basis for developing competitive positioning and promotion campaigns. The more unique the attributes, the more strength they have in sustaining competitive advantage because it is difficult for competitors to emulate those characteristics.
- The existence of dichotomies in existing image perceptions of a destination must be actively addressed by destination marketing activities. This is important to achieve brand synergy across all tourism sectors. A combination of tangible and intangible assets of a country, city or region must be used to address such dichotomies.
- It is not only tourists that hold different images of a tourist destination but intermediaries such as travel agents and tour operators may hold different images of the same place as well. Thus their propensity to influence potential visitors in a positive way cannot be disregarded. They are a major source of image dissemination.

## 2.8.5 DESTINATION BRANDING

- A destination brand is complex by design because it partly reflects the image of a destination. It is made up of multiple products, services, messages, associations and character traits. There must be synergy between all these elements for the brand to be successful. The potential for confusing messages being communicated is far greater because all these components are managed and controlled by different players across various industries.
- A destination brand can only succeed if its brand identity is at the centre of its brand essence surrounded by benefits, attributes and emotion. The essence of the brand is timeless and remains virtually unchanging as it travels through new markets and products.
- The most important aspect of a brand is its single-mindedness. Therefore there must be branding synergy between the destination brand and individual suppliers' brands to create a powerful image of the destination. Service performers are a powerful medium for building brand equity. They transform brand vision to brand reality. By consistently matching or exceeding visitor expectations, they build the destination strength on service quality, which is a difficult attribute for competitors to match.
- Destination marketing organisations must comprehensively assess all their potential target markets and choose only those that will maximise their brand appeal. Targeting countries haphazardly can only damage the brand.
- Creating brand awareness is a major responsibility of destination marketing organisations. Many destinations suffer more from a lack of awareness of its offering than anything else. Brand visibility can signal leadership, success, quality and even excitement.
- Brand elements are an integral part of building a destination brand. They serve to identify and differentiate a brand by enhancing brand awareness and facilitating the formation of strong, favourable and unique associations with a brand. However, its importance is often understated in developing marketing strategies for a destination.

- Choosing which favourable and unique associations to link to a brand is a difficult task and requires careful analysis of the consumer and competitor to determine optimal positioning of the brand. Differentiation of brand image being the end goal of positioning, a competitive advantage will be gained by adding symbolic and existential benefits perceived by consumers to a destination brand.
- Visitors and non-visitors have different brand images of the same destination. It is therefore important to develop separate image and positioning strategies for these two distinct groups to communicate and position the destination favourably.
- Brand associations stem from attributes of a destination, benefits of that place and attitude of visitors towards the destination brand. These form the basis of future behaviour towards the destination brand. Destination saliency, user and product imagery, brand fingerprinting, and brand personality analysis are the most common ways of measuring perceptions of a destination brand.
- Secondary brand associations are particularly important for destination brands. This is because a destination exists within a local, national and international context. Both positive and negative brand associations with a supra-brand are likely to be transferred to the sub-brands. Therefore the sub-brands can only be as successful as the supra-brand.
- Emotional branding is a way of creating a personal connection and dialogue between a brand and its target audiences. This is especially significant for destination brands because it helps to convey the essence of the brand communicated via few key attributes and associations. Customers are looking for brands that understand their needs and cultural orientation intimately.

## **2.8.6 DESTINATION POSITIONING, COMPETITIVENESS AND DIFFERENTIATION**

- The power of positioning lies in its ability to convey how a destination will satisfy the needs of potential visitors better than competitor brands. It involves developing and communicating key product and service attributes that are consistent with the brand image.

- A clear brand positioning provides a focus and mechanism for consumers to make brand choice, which improves the effectiveness of external marketing activities and guides internal development. Competition among destinations is therefore derived largely from choices tourists make between alternative destinations.
- Long haul destinations such as Cape Town have to provide good value for money to get consumers attention. The distance that they have to travel in itself has economic, physical and psychological costs. Therefore, these destinations need to provide greater benefits than competitors that are geographically nearer to major generating markets.
- Destination differentiation reinforces a destination's competitive position. Yet a destination is competitive up to the extent that its products and services are competitive. Therefore destination differentiation stems from a unique appeal of its products and services.
- The goal of destination differentiation is to establish point-of-difference associations. These associations are unique to the brand and are also strongly held and favourably evaluated by potential visitors. However, point-of-parity associations are necessary for a destination to be a legitimate and credible product offering. They represent the necessary but not sufficient conditions for brand choice. They are designed to negate other destination's points- of-difference.

## **2.9 RESEARCH OBJECTIVES**

Based on the literature review and the conclusions drawn thereof, the following research objectives are formulated in order to gain a better understanding of international tourists' perceptions of brand Cape Town.

**Objective 1:** To identify attributes that are important to international tourists when choosing a destination.

**Objective 2:** To assess the importance of destination image in destination selection.

**Objective 3:** To identify the most influential sources of information to tourists prior to their visit.

**Objective 4:** To determine tourists' expectations of Cape Town as a holiday destination.

**Objective 5:** To determine tourists' perceptions of Cape Town.

**Objective 6:** To identify the projected images of Cape Town in tourists' home country.

**Objective 7:** To determine the image of Cape Town based on its attractions, accessibility, amenities and ambience.

**Objective 8:** To identify the most important attributes that differentiate Cape Town from other competing destinations.

**Objective 9:** To describe any differences in brand personality of Cape Town and South Africa.

**Objective 10:** To identify the perceived weaknesses of Cape Town as a holiday destination.

**Objective 11:** To determine awareness and perceptions of the various logos used to market Cape Town as a holiday destination.

**Objective 12:** To understand tourists' attitude towards brand Cape Town.

**Objective 13:** To determine perceptions of Cape Town vis-à-vis other cities in South Africa.

**Objective 14:** To identify constructs that can be used for designing a logo and positioning of brand Cape Town.

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# CHAPTER 3

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## QUALITATIVE RESEARCH METHODOLOGY & FINDINGS

### **3. QUALITATIVE RESEARCH DESIGN**

According to Aaker et al. (1998: 71), “a research design is the detailed blueprint used to guide a research study towards its objectives.” The research design is foremost influenced by the nature of the research. Generally there are three types of research namely: exploratory, descriptive, and causal. Exploratory and descriptive research methods were used as they contributed the most to the outcome of this investigation given the time and budget constraints.

#### **3.1 EXPLORATORY RESEARCH**

Exploratory research is used when one is seeking insights into the problem at hand, possible decision alternatives and variables that are relevant to a particular investigation (Aaker et al, 1998). Exploratory research can be divided into secondary and primary research.

##### **3.1.1 SECONDARY QUALITATIVE RESEARCH**

Secondary research is research into existing data that has been collected and processed for purposes other than the one at hand but helps in solving the research problems.

##### **Literature Review**

A literature search was conducted to familiarise the author with the problems at hand and to develop research objectives and hypotheses. The literature review contributed significantly to the author’s understanding of destination marketing, destination image and branding. Emphasis was placed on the recency of the literature but marketing and tourism ‘classics’ could not be ignored.

##### **Trade Literature**

Trade literature in the form of past research on international tourists was obtained from Western Cape Tourism Board, and Cape Metropolitan Tourism. Magazines and journals dealing with tourism in Cape Town were also consulted. Publications from the Western Cape Provincial Government Department contributed significantly towards a more in depth understanding of the problems at hand.

### **Websites**

The website for Western Cape Tourism Board, Cape Metropolitan Tourism, Cape Town Tourism and the Joint Marketing Initiative were useful. They provided the much needed insights into the type of information that is available to international tourists, the changes that is happening in the industry through the JMI, the strategy that is being developed for brand Cape Town and the challenges facing the implementation of such a strategy.

## **3.1.2 PRIMARY QUALITATIVE RESEARCH**

Primary data is collected specifically to address specific research objectives. In-depth interviews were used to obtain a greater understanding of how international tourists perceive brand Cape Town. The literature review showed that an unstructured methodology is particularly useful when one is trying to gain insights into customers' experience of a brand.

### **In-depth Interviews**

Eighty-five in-depth interviews were conducted among international tourists visiting Cape Town during the months of September and October 2001. A convenience sample was chosen and respondents were interviewed at the following locations:

V&A Waterfront	Radisson Hotel	Enchanted B&B	Church Street Backpackers
Camps Bay beach	Table Bay Hotel	Brown Sugar Backpackers	Blackheath Lodge
Cullinan Hotel	Kingswood B&B	Long Street Backpackers	Richborough Villa
Kirstenbosch Gardens			

A discussion guide was used as the guideline for the in-depth interviews. The discussion guide (**Appendix B**) analysed consumer behaviour and the decision-making process of travel consumers, their expectations of Cape Town and aligned these against tourists' perceptions of Cape Town. The perceptual issues probed included:

- What attributes do tourists consider when choosing a destination?
- What importance do they attach to these attributes and destination mix elements?
- What were consumers' perceptions of Cape Town as a holiday destination?
- What did travellers imagine and feel when they thought of Cape Town prior to their visit?

- What were the city's major strengths and weaknesses as a holiday destination in the eyes of the customer?

Moreover, Echtner and Ritchie (1993) suggested that the components of destination image could only be fully captured through a combination of structured and unstructured methodologies. The unstructured methodology for this research focused on measuring destination image and was developed as a series of open-ended questions that captured the holistic components of destination image along with functional and psychological dimensions. The presence of distinctive features and auras within these impressions were also explored. Thus the discussion guide was designed with the following questions in mind as well:

- What images or characteristics come to mind when a visitor thinks of Cape Town as a holiday destination?
- How would they describe the atmosphere or mood that they will expect to experience while visiting Cape Town?
- What distinctive features of the destination could they think differentiate the destination from competing ones?

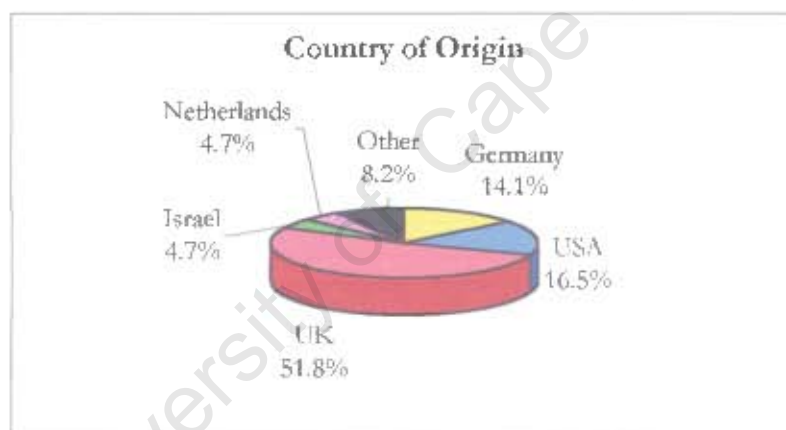
In addition, projective techniques were used as they play an important role in qualitative marketing research. These techniques helped to gain a deeper insight into people's feelings and perceptions. A variety of projective techniques were used with varying degrees of success. The most successful were the word association and brand personality. Word associations were used at the beginning of the session and as a preparation for other techniques. The aim was to discover a range of vocabulary connected with branding, brand attitude and imagery of Cape Town. The brand personality technique introduced in the middle of the interview led to interesting results with respect to Cape Town and South Africa being described as a person. The brand fingerprinting technique was used to investigate the respondents' experience of, and their relationship with the brand. It examined the thoughts and feelings held about the brand through the senses (sights, sounds, smells, taste, touch and feelings).

## 3.2 IN-DEPTH INTERVIEWS FINDINGS

The next section of Chapter 3 details findings from the primary qualitative research conducted among 85 international tourists visiting Cape Town during the months of September and October 2001. The findings are presented according to the research objectives formulated earlier on.

### 3.2.1 DEMOGRAPHIC AND TRAVELLING CHARACTERISTICS OF RESPONDENTS

The demographic characteristics of respondents were as follows. The majority of respondents were males (67%) and the average age of respondents was 27 years old. Nearly 95% of respondents were either on holiday or visiting family and friends (VFR) or both. More than half (52%) of the respondents were from the UK as shown in **Figure 9**. The country of origin of respondents mirrors previous research conducted on the country-of-origin of international tourists visiting Cape Town, which showed that the majority of them were from UK (25%), Germany (15%) and North America (13%) (GTFK, 2001).



**Figure 9:** Country of Origin of Respondents

Regarding the travelling characteristics of respondents, nearly 28% of them travel once a year for VFR or holiday purposes while 41% travel on average two-to-four times a year for the same reason. **Figure 10** shows that 18.8% of respondents have been to Australia before while 38.8% have been to France. The US has been visited by 28.2% of respondents. Similarly, respondents have visited UK (31.8%), Spain (28.2%), Italy (20%) and Germany (17.6%) before. The findings suggest that visitors to Cape Town are usually well travelled. More interestingly though, if one aggregates the findings by region visited, Europe (72.9%) is by far the most favoured destination of respondents. This is simply due to the proximity and easy accessibility

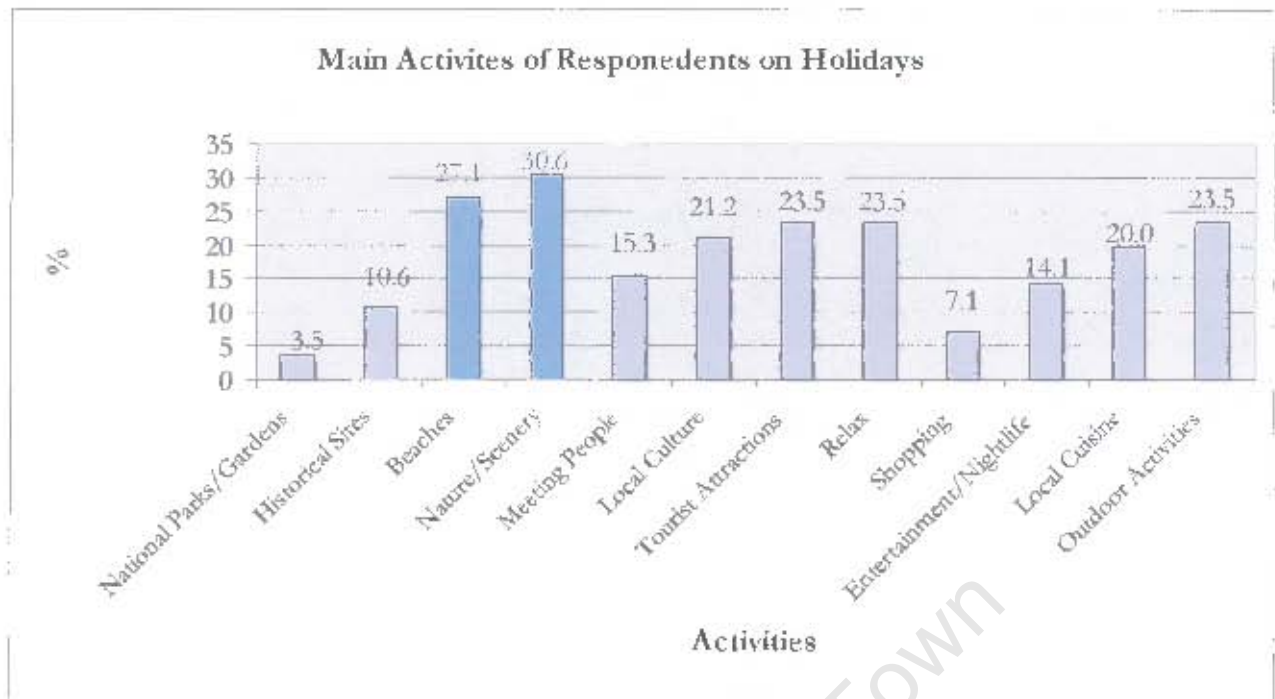
As would be expected, many respondents (38.8%) rely on word-of-mouth to plan their holidays. Travel agents are used by 37.6% of respondents when planning their holidays while 11.7% make use of tour operators. It is interesting to note that 25.8% of respondents plan their own holiday, of which, 4.7% make use of guidebooks while 5.8% make use of the Internet. Also, of those who plan their own holiday, 9.4% make use of a travel agent to book flights only while 4.7% make use of a tour operator. These findings suggest that travel intermediaries are used to plan holidays and as such are a major source of influence on travelling decisions. They play an important role in influencing brand image and brand expectations. Their recommendations can either encourage or deter first time visitors.

**Table 1** shows that 28.2% of respondents usually travel alone while on holidays. Equally important is the fact that 40% of respondents usually travel with friends while on holidays. Yet some of the respondents usually travel alone or with family and friends depending on the destination they are visiting. Therefore these figures merely reflect whom they are travelling with in Cape Town. These figures tend to confirm that the VFR market is one of major importance to the Cape Town tourism industry.

TRAVEL PARTNERS	%
Alone	28.2
Friends	40.0
Family	34.1
Spouse	18.8
Partner	7.1

**Table 1:** Travel Patterns of Respondents

**Figure 12** shows the main activities that respondents are involved in while on holidays. They like to visit historical sites (10.6%) such as museums, archaeological sites and art galleries. Tourist attractions, both natural and man-made, are visited by 23.5% of respondents. Outdoor activities such as mountain climbing, hiking and surfing are also favourite activities of respondents (23.5%). The scenic beauty attracts 30.6% of respondents while the beach attracts 27.1% of them. Three respondents mentioned that they *'avoid the usual tourist attractions like the plague'*. This highlights the different markets that the destination attracts and the diversity of products offered.



**Figure 12: Main Activities of Tourists on Holidays**

The findings are now presented in terms of the objectives that were set out for this study.

### 3.2.2 FACTORS INFLUENCING DESTINATION CHOICE

**Objective 1: To identify factors that are important to international tourists when choosing a destination.**

Figure 13 shows that climate/weather (32.9%) and value for money (25.9%) are the most important factors that international tourists consider when choosing a destination. It must be realised that good weather/climate is a major factor for Europeans as they plan holidays to avoid the difficult winter in Europe. With South Africa's major source market being Europe, it is no surprise that good climate is valued highly by international tourists. Culture is a major draw card if one considers that 21.2% of respondents mentioned that their main activity at a destination is experiencing the local culture and 22.4% mention it as a factor influencing their choice of a destination. Given that a significant number of respondents have visited countries such as France (38.8%), Italy (20%), and Spain (28.2%) that are renowned for their distinct culture, tend to confirm the proposition above. Value for money (25.9%) is expected to be a major factor influencing destination choice as new emerging destinations such as South Africa are increasingly competing on value for money and unique experience to get a share of the world travel market. Two respondents mentioned each of the following factors when choosing a destination: uniqueness of the destination, quality

of accommodation, unpolluted environment, and language. These are factors to be explored in more depth in the quantitative research.

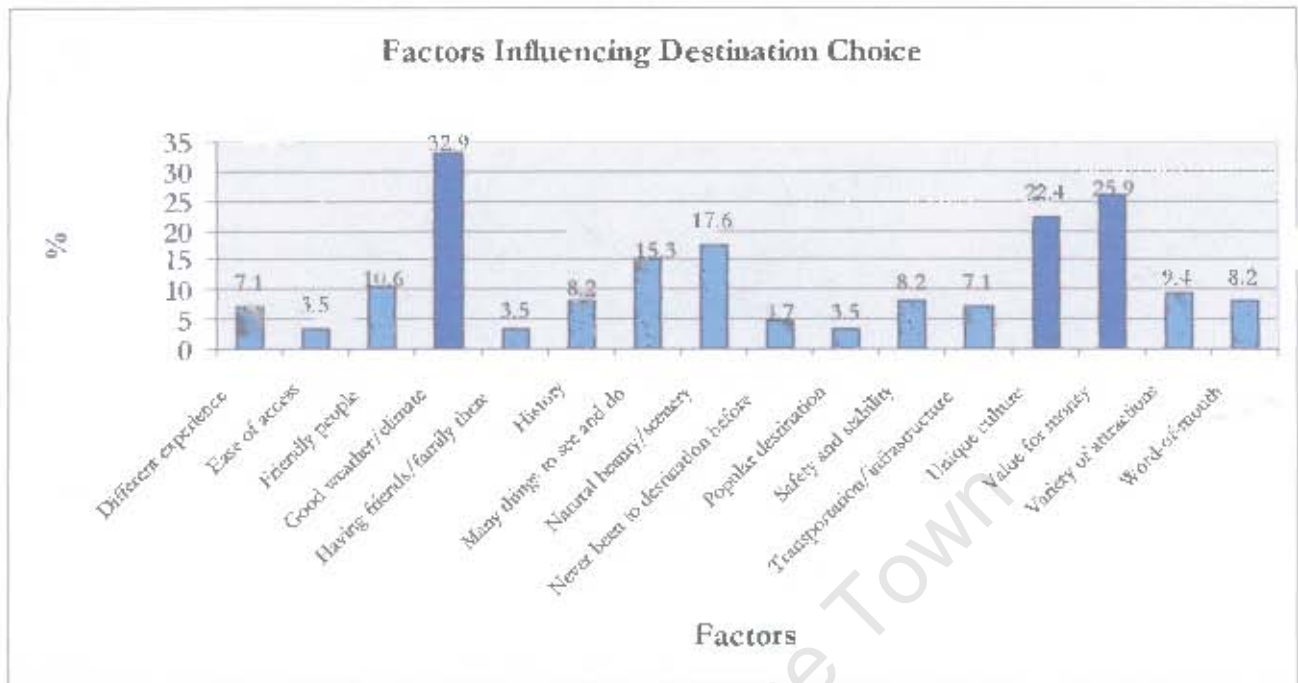


Figure 13: Factors Influencing Destination Choice

### 3.2.3 IMPORTANCE OF DESTINATION IMAGE IN DESTINATION CHOICE

*Objective 2: To assess the importance of destination image in destination selection.*

Destination image is considered important by 27.1% of respondents while 24.7% considered it to be unimportant as shown in **Figure 14**. Those who mentioned that destination image is unimportant were probed to find out why they had such a thought. The main reason given by them was that image of a destination is not usually a true reflection of reality. These tourists would rather experience the destination and then form an impression rather than rely on image to form an opinion. This happens when destination marketing organisations are unable to use the appropriate marketing tools to create the right expectations. When expectations are not fulfilled, customers are usually dissatisfied, that has in itself implications on word-of-mouth, repeat visit and likeliness to recommend the destination to others. Those who considered image to be very important said that they would not choose a destination if the image was not appealing. A negative image is a deterrent to even consider a destination as a possible holiday destination. A respondent

mentioned that he chose Cape Town over Johannesburg because of the crime-ridden image of Johannesburg. This issue needs to be researched further in the quantitative study.

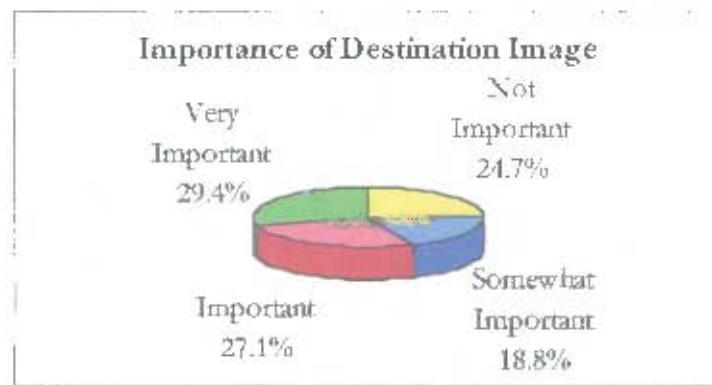


Figure 14: Importance of Destination Image

### 3.2.4 MOST INFLUENTIAL SOURCES OF INFORMATION

*Objective 3: To identify the most influential sources of information to tourists prior to their visit.*

Most of the respondents heard about Cape Town from family and friends (61%) as shown in Figure 15. Other sources that were mentioned were the Internet and travel agents, each mentioned by two respondents. The more uncommon responses were videos by other tourists and outdoor advertising, each mentioned by one respondent. When respondents were asked about whether anyone recommended the destination to them, family (17.6%) and friends (44.7%) were the most important source of recommendation as shown in Figure 16. Travel agents were a source of recommendation for only 4.7% of respondents. This implies that travel intermediaries do not really 'push' the destination as a holiday getaway. Further research needs to be done to identify the reasons behind intermediaries not recommending the destination. There is a possibility that incentives given to them by tour operators and principals are inadequate or that they hold negative perceptions about the destination. Equally important is the fact that 15.3% of respondents did not rely on recommendations from anybody to visit Cape Town. This may be linked to previous comments made by tourists that they would rather find out about the destination experience themselves than relying on other sources of information.

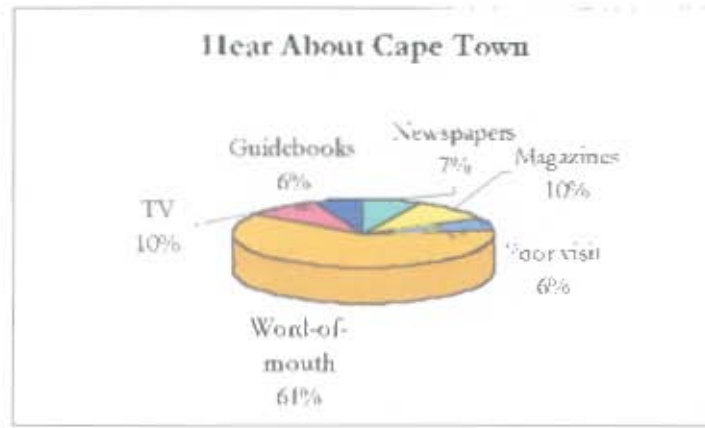


Figure 15: How International Tourists' Heard About Cape Town

Nevertheless, family and friends are the most influential sources of information. This tends to be a common occurrence when potential visitors are not particularly familiar with a destination or they are unsure of what to expect. They tend to seek advices from people who have visited the destination before to reinforce their expectations and perceptions. Also, the power of word-of-mouth should not be underestimated under such circumstances. Both positive and negative word-of-mouth messages are more likely to stick in the potential visitor's mind than any other information that the potential visitor might have gathered so far. Word-of-mouth has the potential of translating an interest about the destination into an actual visit and it may also equally deter potential tourists from visiting. Therefore ensuring that previous visitors leave the destination with a positive experience goes a long way towards ensuring future visits.

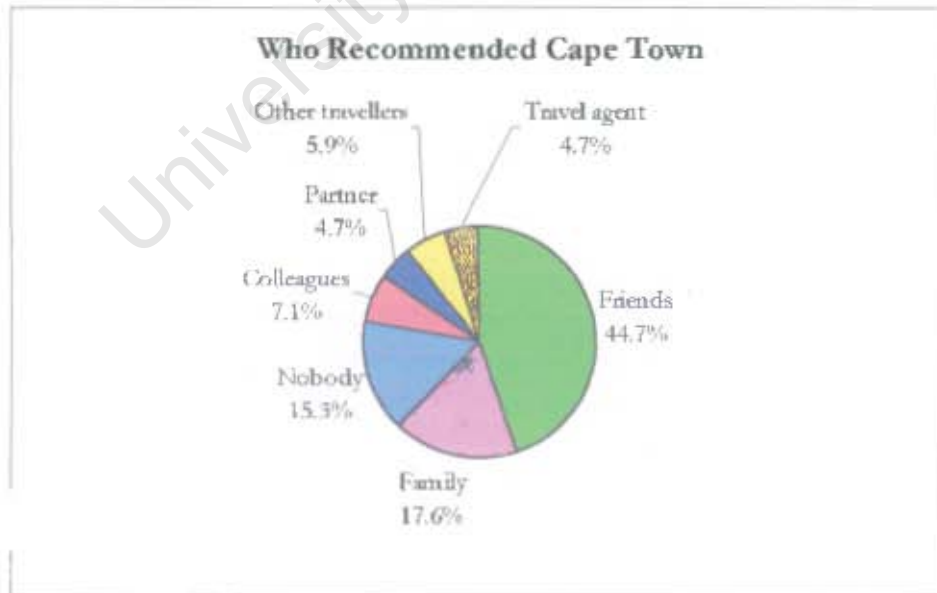


Figure 16: Sources of Recommendation

### 3.2.5 'TOURISTS' EXPECTATIONS OF CAPE TOWN

*Objective 4: To determine tourists' expectations of Cape Town as a holiday destination.*

Understanding expectations are paramount to tailor the product offering to suit the needs of different target markets. It is interesting to note that 7.1% of respondents said that they did not form any expectations prior to visiting because they did not want to be influenced by what other people had to say. Of more concern is the fact that 8.2% of respondents said that they did not know much about Cape Town before their arrival and did not know what to expect. This highlights the type of challenge that lies ahead in terms of creating the right expectations among international travellers. It is evident from **Figure 17** that tourists' expectations in terms of Cape Town having beautiful scenery (17.6%) are matched by reality. Safety (14.1%) is perceived as being a problem. International visitors are not sure about the safety of the destination. Nevertheless, they seem to have a good opinion of the product offering and the kind of attractions (beach, mountain, good weather, friendly people etc.) that the city has to offer. It appears that they have the right expectations but more important is whether these expectations are matched by reality. Also, research needs to be undertaken to find out what sort of expectations/perceptions international travellers **not** coming to Cape Town hold about the destination.

Each of the following factors were mentioned by two respondents in terms of what they expected: big city, wild city, Robben Island, clean city, getting mugged, and a 'less civilised' city. The following factors were mentioned by one respondent only: inexpensive, easy to get around, good nightlife, wine farms, polluted city, poverty, comfortable, and a city that is more open to tourists. These factors need to be explored further in the quantitative study.

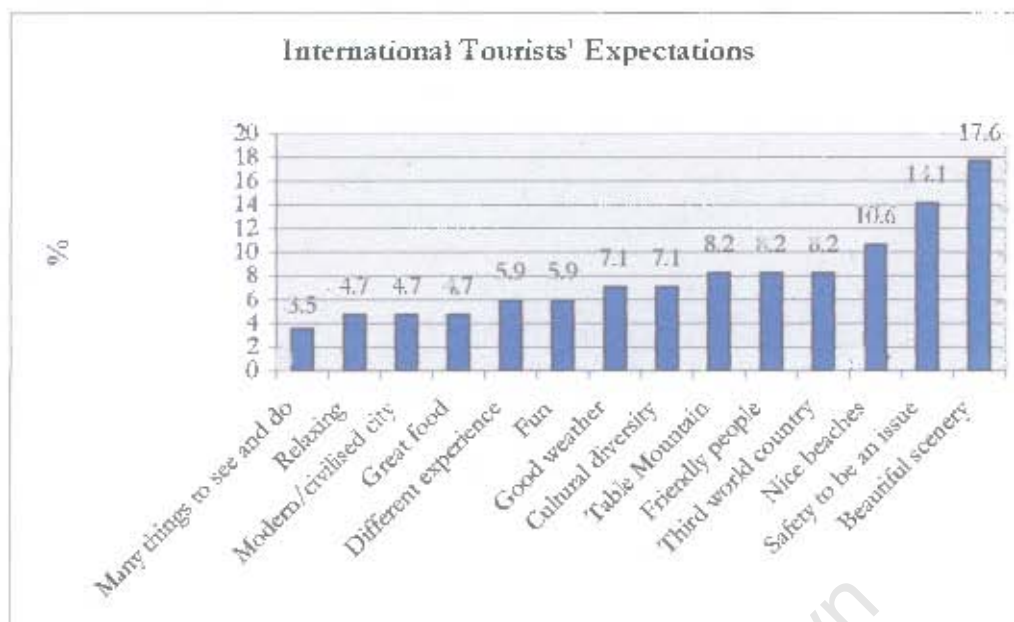


Figure 17: International Tourists' Expectations

What potential visitors expect, influence to a large extent why they choose a particular destination. The more favourable/positive the expectations are, the greater the likelihood of that destination being chosen as a holiday getaway. Respondents were asked why they had chosen Cape Town as a destination. Responses indicate a correlation between what they expected and why they chose Cape Town. Respondents mentioned the following factors:

- |  |                                     |
|--|-------------------------------------|
| Many things to see and do (5.9%)                     | Natural beauty (4.7%)               |
| Part of an organised tour (11.8%)                    | Visiting family and friends (16.5%) |
| Cultural diversity (5.9%)                            | Way of life (3.5%)                  |
| Location at the tip of Africa (3.5%)                 | New destination (3.5%)              |
| Gateway to other places in Africa (3.5%)             | Good weather (5.9%)                 |
| Positive word-of-mouth about the destination (10.6%) | Cheap (8.2%)                        |
| History of the country (4.7%)                        |                                     |

Some of the most interesting factors are 'part of an organised tour, visiting family and friends, and new destination'. These factors raise the question as to whether respondents would have visited Cape Town if it was not part of the tour or they did not have any family or friends in Cape Town or if Cape Town was not 'new as a destination'. What seems to draw visitors to Cape Town are more or less the same factors (scenic beauty, cultural diversity, friendly people, good value for money, good weather etc.) that they use when

choosing a destination and part of the primary activities that they undertake at a destination. Once again, word-of-mouth (10.6%) plays an important role in destination choice. These factors clearly indicate a good synergy between expectations and perceptions. Other factors mentioned by respondents as to why they chose Cape Town include: prior visit to the country, curiosity, convenience, vineyards, friendly people, beaches, shopping, safari, exotic African destination. These factors were mentioned by one or two respondents and need to be explored further.

Much of what international visitors expect come from their source of information about the destination in their home country. As mentioned earlier, family and friends are the main sources of information and recommendation about the destination. They seem to emphasise the attractions of Cape Town to potential visitors. Table Mountain (35.3%) is by far the attraction that was emphasised the most prior to their visit, followed by the beach (22.4%) and wine farms (22.4%) as shown in **Figure 18**. Of concern is the fact that 12.9% of respondents said that nothing was emphasised to them by sources of information prior to their arrival. This could be due to either their sources of information not finding anything special about the destination or they were not fully satisfied by their destination experience, highlighting the potential existence of gaps between expectations and reality. Other things mentioned to visitors by various sources of information include bad service, crime and safety issues, whale watching, Canal Walk, Signal Hill, history of the country, friendliness of people, and good-looking people. Only one or two respondents mentioned all these.

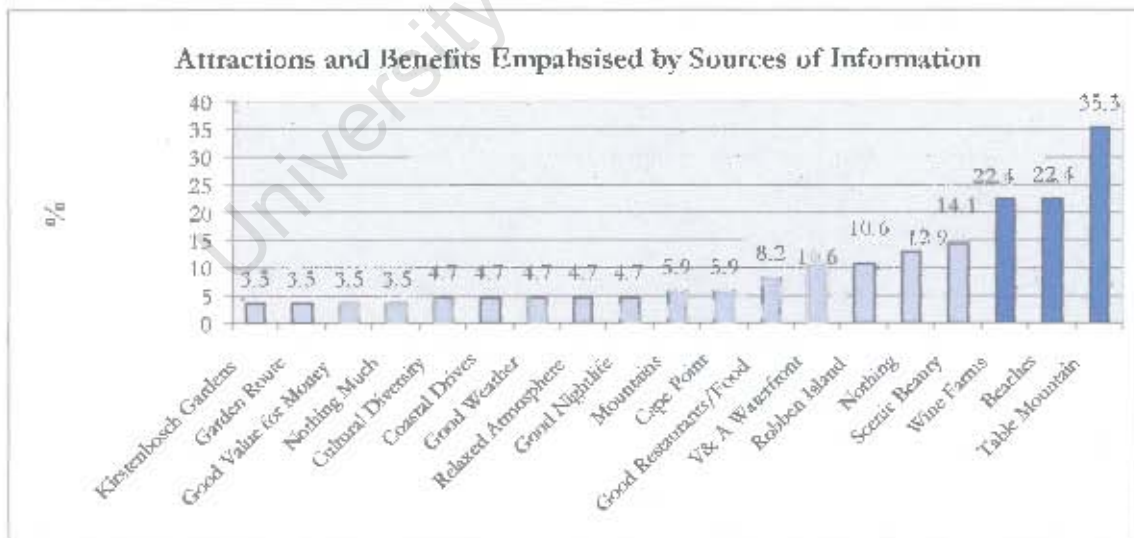


Figure 18: Attributes/benefits Emphasised by Sources of Information

### 3.2.6 TOURISTS' PERCEPTIONS OF CAPE TOWN

#### *Objective 5: To determine tourists' perceptions of Cape Town.*

While visiting Cape Town, 68.2% of respondents said that their perceptions had changed. They were probed to find out what specifically had changed their perceptions of the destination. Interestingly, 18.8% of respondents said that they found the city much safer than they expected, 10.6% said that the city is more beautiful than they expected, 5.9% said that the locals are friendlier than expected while 7.1% found the city more westernised/cosmopolitan than they thought it would be. Other responses included the following:

- The infrastructure is better than expected.
- The country is far more stable than expected.
- The city is bigger than expected.
- The city is much more modern and developed than expected.
- The variety of things to see and do is much bigger than expected.
- It is more culturally diverse.
- The level of service is higher than expected.
- There are more black people than expected.
- People are far more open-minded than expected.

The diversity of responses seems to suggest that any prior marketing campaigns did not create the right expectations. International tourists still do not know what to expect when visiting Cape Town. These comments tend to confirm the existence of gaps between what tourists' expect and what they actually experience.

On the other hand negative perceptions included the following:

- The poverty is worse than expected.
- The contrast between rich and poor is wider than expected.
- The city is less clean than expected.
- The public transport is worse than expected.
- The city is less safe than expected.
- Tourists expected the destination to be more 'safari' like.
- The city is far too Westernised/Americanised.
- Race is still an issue in the city.
- The weather is far worse than expected.

Again one can see major contradictions between positive and negative perceptions. Some tourists for example, believe that the infrastructure is better than expected while others do not. This has a lot to do with the infrastructure in the visitor's home country and the infrastructure in other countries they have visited. Visitors tend to compare across board to form an opinion. The quantitative study will have to investigate such perceptions in more depth.

To try to understand tourists' perceptions of the destination in more depth, they were asked about things that either surprised or disappointed them. Respondents (58.9%) claimed that the following aspects of the destination surprised them as shown in **Figure 19**. What surprised them are more or less the same factors that led to changes in their perceptions of the destination. This implies that such factors should definitely be marketed. Marketing activities should reinforce the fact that the city is far more modern and developed than expected. The same applies to crime, which tourists perceive to be not as bad as they thought it would. Not many things disappointed respondents as such. The low standard of living/poverty disappointed 4.7% of respondents. The poor weather was the biggest disappointment as mentioned by 10.6% of respondents. This is not surprising given that Cape Town had the worst winter ever in 40 years. The high number of street children disappointed 3.5% of respondents. Poor perceptions of safety at night disappointed 3.5% of respondents while public transport was equally disappointing at 4.7%. Other aspects that disappointed international tourists include the following: litter on the streets of Cape Town, Waterfront is too commercial, very strong winds, congestion on the roads, lack of information on places/areas to avoid, lack of 'Africaness' of the destination, smaller city than expected, racial tension between communities, and high crime level.

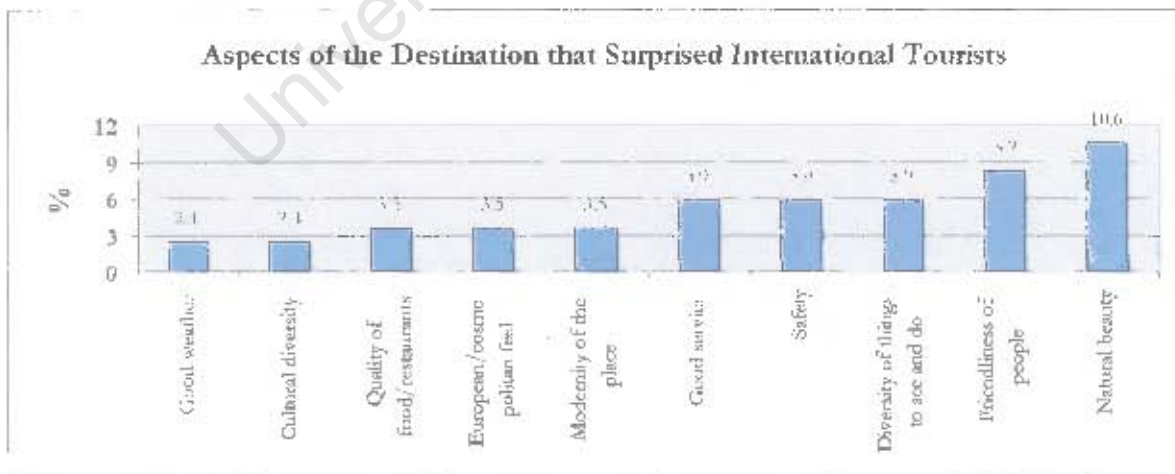


Figure 19: Factors that Surprised International Tourists

### 3.2.7 PROJECTED IMAGES OF CAPE TOWN

*Objective 6: To identify the projected images of Cape Town in tourists' home country.*

Table Mountain is the image that most (41.2%) respondents could recall of Cape Town as shown in **Figure 20**. It is important to realise that 22.4% of respondents have no distinct image of Cape Town in their mind despite the fact that they might have mentioned Table Mountain as being one of the attractions that was emphasised to them by sources of information/recommendation. To these visitors Table Mountain might not differentiate Cape Town from any other destinations or it did not stand out as being unique. The destination not having a distinct image is a major source of concern given that 27% of respondents mentioned that destination image is very important when choosing a destination. The lack of a clear image therefore does not help in positioning the destination in the potential visitor's mind. Nevertheless, the images that respondents hold about the destination are strongly related to what sources of information/recommendation said to them. Those images indeed created a positive feeling about the destination as mentioned by 35.3% of respondents while 14.1% said they had a negative image of the destination prior to their visit. Having said this, 10.6% of respondents were indifferent to the image used to market the destination in their home country. This relates to those respondents that would rather experience the destination first and then form an opinion of it rather than relying on images or recommendations from others to form an opinion.

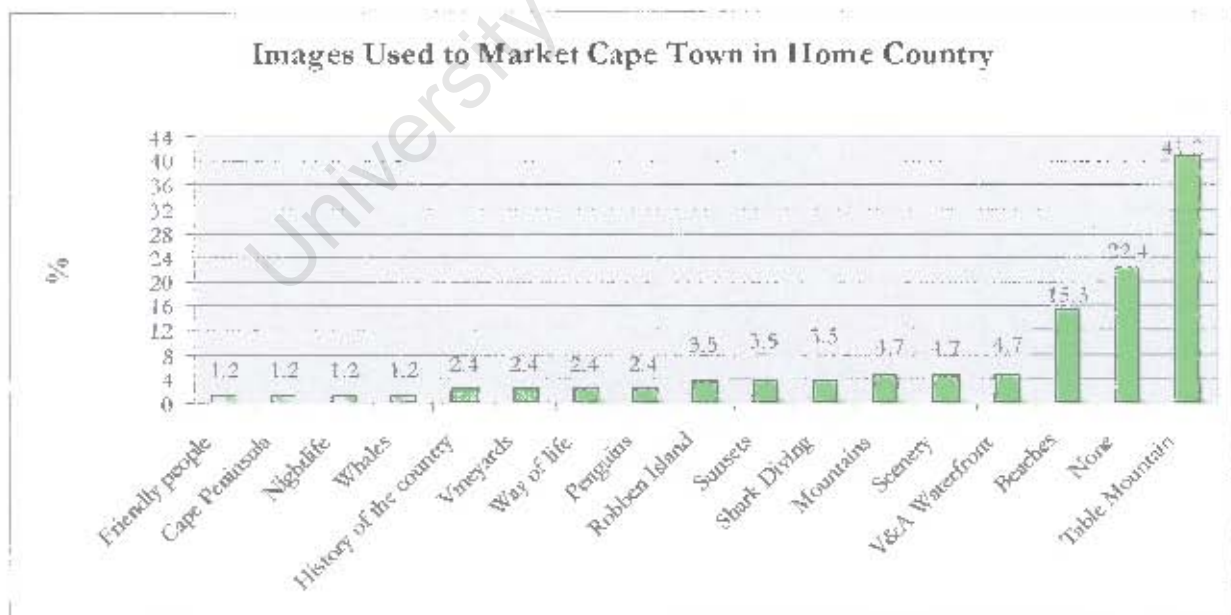


Figure 20: Images Used to Market Cape Town in Visitor's Home Country

### 3.2.8 PERCEIVED IMAGES OF CAPE TOWN

**Objective 7: To determine the image of Cape Town based on its attractions, accessibility, amenities and ambience.**

The image of a brand is created by marketing programs that link strong, favourable, and unique associations to the brand in the memory of the visitor. However most importantly, direct experience with the brand reinforces the favourability, strength and uniqueness of brand associations. Tourists evaluate the perceived images against projected images to form a realistic and differentiated image of a destination. Word association was used to measure the perceived images of Cape Town and the results are shown in **Table 2**.

Word	No. of respondents	Word	No. of respondents
Nightlife	2	Stellenbosch	2
Mountain	8	Simon's Town	3
Good restaurants	3	Windy	3
Good weather	3	Unsafe	4
European/cosmopolitan	4	<b>Table Mountain</b>	<b>38</b>
<b>Beaches/sea</b>	<b>26</b>	V&A Waterfront	7
<b>Scenic beauty</b>	<b>14</b>	Historical	2
Unique culture	3	Modern	5
Sun	5	Different	4
Diversity	2	Robben Island	5
Relax	6	Cape Point	4
<b>Wine</b>	<b>12</b>	Friendly	8
Nature	4	Laid back	3
Crime	2	Street Children	2
Beautiful women	5		

**Table 2:** Word Associations with Cape Town

According to 44.7% of respondents 'Table Mountain' is the word that is most strongly associated with Cape Town followed by beaches/sea (30.5%), scenic beauty (16.5%) and wine (14.1%). Brand associations can be both positive and negative. The negative brand associations with Cape Town seem to be crime, unsafe and street children. By all means, the positioning of brand Cape Town should steer away from such negative associations and reinforce the positive ones. Positioning is a comparative concept where the brand is positioned against competitors' brands to emphasise the strengths and uniqueness of the brand. Ultimately,

Cape Town as a brand will be positioned in light of how South Africa is positioned to create synergies between the two brands. Brand associations with South Africa revealed the following as shown in **Table 3**.

Word	No. of respondents	Word	No. of respondents
Historic	2	Segregation	2
<b>Scenic beauty</b>	<b>18</b>	1st world and 3rd world	2
Culture	2	Beaches	3
Diversity	4	Nature	6
Crazy weather	3	Nice Life	4
Good value for money	5	Township	3
<b>Wildlife</b>	<b>22</b>	<b>Safaris/Game parks</b>	<b>12</b>
Africa	5	Spacious	4
Sea	3	Springbok Rugby	5
<b>Nelson Mandela</b>	<b>14</b>	<b>Cape Town</b>	<b>15</b>
Apartheid	9	Blue Skies	2
<b>Sun</b>	<b>10</b>	Race	8
Hot	5	<b>Crime</b>	<b>12</b>
Poor People	3		

**Table 3:** Word Associations with South Africa

According to respondents, South Africa is associated with scenic beauty (21.2%), wildlife (25.8%), Nelson Mandela (16.5%), Sun (11.7%), Safaris/Game Parks (14.1%), Cape Town (17.6%) and Crime (14.1%). Scenic beauty is a common factor that needs to be emphasised in positioning both brands while Table Mountain should be used to position Cape Town. Nelson Mandela and safaris should be used to position South Africa. The strongest negative brand association with South Africa is indeed crime. In addition, the image of a destination is a reflection of its destination mix elements, that is, how visitors perceive its attractions, accessibility, amenities and ambience. Each of the following will now be analysed to form an overall image of Cape Town in terms of its destination mix.

### 3.2.8.1 ATTRACTIONS

Respondents had visited the following attractions at the time the survey was conducted: Kirstenbosch, Robben Island, Table Mountain, Cape Point, wine farms, beaches, and the V&A Waterfront. When asked to rate these attractions in general, 19.3% of respondents said that the attractions were very good, 34.7% said it

was good, 11.6% said it was well marketed, 15.5% said it was very varied, 14.7% said it was what makes Cape Town unique, and finally, 4.2% described the attractions as being the 'usual touristy attractions'.

Some insightful comments on the various attractions are:

- Kirstenbosch is amazing.
- Cape Point is exceptional and interesting.
- The Cable Car up Table Mountain is the most exhilarating experience.
- It is nice to see so many attractions close to each other.
- V&A is too commercial and does not feel authentic.
- Table Mountain is overrated – I don't see what the fuss is all about.
- Table Mountain is just a 'big piece of flat rock'.
- Table Mountain, Cape Point and Robben Island are too 'touristy'.

Despite some negative comments on the attractions, most respondents (94.1%) agree that Cape Town's attractions enhance the city's appeal as a destination. Respondents said that the attractions enhance the city's uniqueness and individuality. The attractions add excitement and differentiate the destination. The authenticity of the historical value of some of these attractions is unique to the world. They make Cape Town special. Therefore, there is no doubt with regards to the attractiveness of the city as a destination. The product meets consumers' needs and perhaps packaging and marketing need to be better to realise the full potential of the destination.

### **3.2.8.2 ACCESSIBILITY**

From **Figure 21** it can be seen that 61.2% of respondents found Cape Town easily accessible in terms of flight and visa requirements. However, 8.2% of respondents complained about availability of flights since they felt that enough flights were not available. A further 5.9% of respondents complained that the airfare to Cape Town was too expensive while 12.9% thought that the flight was tiring and long. These are the issues that were raised by respondents in terms of accessibility. Nonetheless, it must be taken into account that Cape Town is accessible off peak-season when the survey was carried out. The quantitative study will reveal whether accessibility is poor in peak season.



Figure 21: Accessibility of Cape Town

Accessibility is also defined in terms of how easily accessible the local infrastructure is. A significant number of visitors perceived Cape Town infrastructure to be good in general as shown in Figure 22.

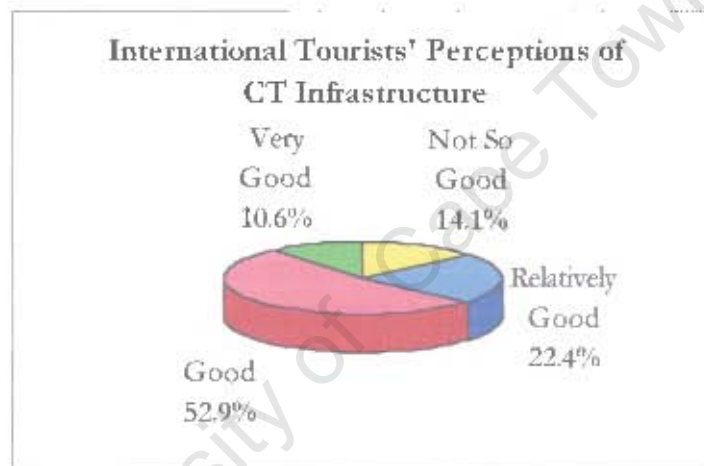


Figure 22: Infrastructure of Cape Town

The only problem seems to be transport and in particular, public transport. The comments on the quality of transport in Cape Town were very varied with 45.8% of respondents saying that the quality of transport needs desperate improvement, 35.3% of respondents hired a car to get around in Cape Town while 11.7% said that the roads in Cape Town are good and 5.9% said that the road signs are poor. Specific comments on each mode of transport can be seen below.

### Train and Buses

Respondents do not view train and buses in a positive light. Some of the comments made are as follows:

- 'The buses are funny, I mean you have a bus schedule, but the bus will arrive early, late or not at all.'
- 'The public transport is unsafe, you have people staring at you, makes you uncomfortable.'

- 'Accessibility to public transport is poor.'
- 'Transport is much worse than home and inconvenient.'

#### Private Taxis (metered)

- 'Taxis are metered so you know that you are not being ripped off.'
- 'Taxis are expensive.'
- 'I feel taxis is the safest means of transport.'
- 'Taxis provide good value for money.'

#### Tour Buses

- 'Tours are well organised and the buses are very comfortable.'
- 'Tour buses are of the same standard as in Europe.'
- 'Tour buses are good.'

#### Car Rental

- 'Hiring a car is the only way you can see Cape Town.'
- 'The service is good and no hassle.'
- 'They provide good value for money.'
- 'Car rental is economical.'

#### Public Taxis (unmetered)

- 'Will never travel in this thing again.'
- 'They are unsafe.'
- 'They are a waste of money.'
- 'They charge three different fares to equal distance destinations.'
- 'They disobey road rules and nobody seems to do anything about it.'

Public taxis and buses contribute significantly towards a negative image of the destination. Brand Cape Town is weakened as a result of such negative perceptions. Yet the tourism industry is not the only one that suffers, the general public is also a victim. Nonetheless the Government has not implemented any measures to deal with the problem.

### 3.2.8.3 AMENITIES/ACCOMMODATION

None of the respondents had any negative comments about their accommodation. Accommodation in general is perceived to be of good standard given that 23.5% of respondents rated their accommodation as being excellent as shown in **Figure 23**. When probed, what did respondents like about their accommodation, 20% of respondents said that the staff at their place of stay was friendly. Respondents (31.7%) also said that the accommodation provided good value for money and that food served was of good quality (5.9%). The service in general at their place of stay was good (28.2%) and that the accommodation was clean and hygienic (5.9%). Some respondents (8.2%) even said that the hotel location was good, as it was situated close to the hub of attractions/activities in Cape Town.

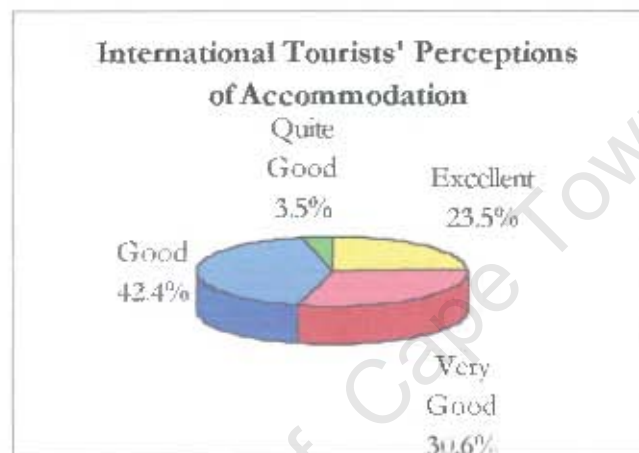


Figure 23: Accommodation Standards of Cape Town

### 3.2.8.4 AMBIENCE

The ambience of a destination is defined in terms of its service levels and way of life. International visitors perceive the service quality in general to be of good standard as shown in **Figure 24**. Some (17.6%) of the respondents described the service as being better than other countries they have visited. One must be careful in interpreting such statistics. International visitors from developed countries are more likely to compare the service standards in Cape Town with the ones in their own country. They may be biased as they might have negative perceptions of the service standards in developing countries. Nevertheless, there is no excuse for providing poor service, service is an integral part of the destination experience and all 'moments-of-truth' should be managed carefully. Service delivery must be flawless if one expects visitors to return to the same destination again. Some insightful comments on the service level follows:

- 'The shopping malls are impressive, they are as good as the ones overseas.'

- 'Restaurant service is good.'
- 'Supermarkets service is bad.'
- 'I was expecting below average service because it is a third world country after all, but I was pleasantly surprised.'
- 'Europe can learn a thing or two from genuine service provided here.'
- 'Service is much better than any other African countries.'
- 'Sometimes the locals lack common sense in service delivery.'
- 'The service is quick, efficient and friendly.'
- 'The service is always with a smile.'

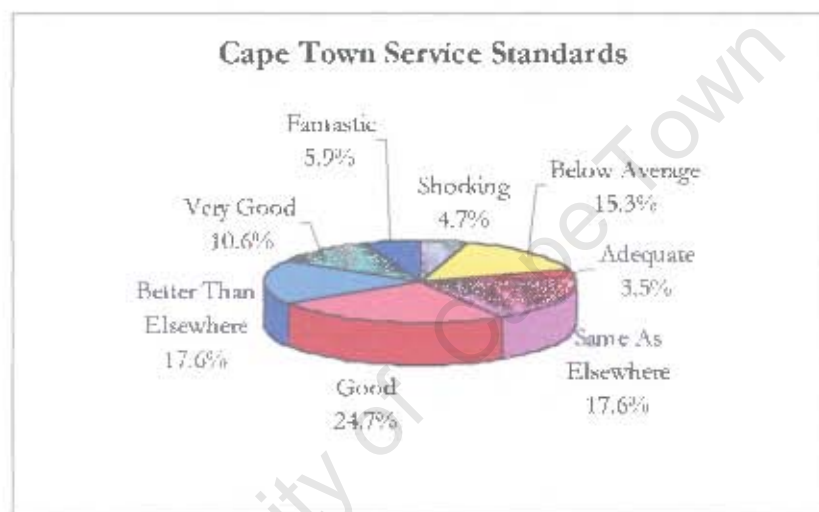


Figure 24: Service Standards of Cape Town

The word 'laid back' was used by 48.2% of respondents to describe the ambience (way of life) in Cape Town while 25.9% said that the ambience was vibrant. The ambience is definitely one of excitement (14.1%) and 15.3% of respondents described the atmosphere as being relaxed and 11.7% as friendly. Other words used to describe the ambience were: youthful, awesome, traditional, cosmopolitan, cliquey, hospitable, busy, posh, chilled, calm, pulsing, cool, lively, light, easygoing, sleepy, slow, hearty, uncomfortable, carefree, fun, colourful, sophisticated, and party-town. Cape Town certainly evokes feelings of excitement, fun and relaxation that should prominently feature in any future marketing campaigns.

Having said all these, it can be concluded that most of the destination mix elements have positive connotations in the minds of visitors with the exception of public transport. One of the strength of brand Cape Town is definitely the quality and variety of accommodations available. Such a strength can only benefit the destination if it is emphasised consistently overtime through all marketing channels. Creating favourable brand associations such as excitement, fun, good service and good infrastructure can only enhance the image of the brand prior to international travellers' visit. The reality of such claims will determine the strength of the associations and overall brand attitude. Brand loyalty is one of the many advantages of creating a positive brand image but repeat visit is not an indication of such loyalty. Brand loyalty should be the ultimate aim for brand Cape Town but loyalty only develops if there is first of all, sufficient awareness of the brand internationally and a strong positive attitude towards the brand that results from a unique positioning in visitors' minds. But the key to ensuring visitors' loyalty is exceeding their expectations each and every time they visit.

### 3.2.9 ATTRIBUTES THAT DIFFERENTIATE CAPE TOWN

*Objective 8: To identify the most important attributes that differentiate Cape Town from other competing destinations.*

The attributes that differentiate Cape Town from other destinations are potential factors that can be used to uniquely position the brand. Not all factors that differentiate a brand can sustain competitive advantage. The strength and uniqueness of a factor that differentiates a brand determine whether it will sustain competitive advantage. Therefore the factors that make Cape Town unique must be interpreted in light of how these factors compare to other destinations. Respondents were asked about their favourite destinations to identify the factors/attributes that make those destinations special. Cape Town and South Africa are clearly the favourite destinations of respondents as shown in **Figure 25**. However, such a finding must be carefully interpreted as respondents might have been biased to say that Cape Town or South Africa are their favourite destinations given that they were being interviewed at the destination. In essence, it justifies to them why they have chosen the destination for holiday purposes. Australia, France, Spain, Thailand and the US can already be identified as competitors and these countries are strong destination brands.

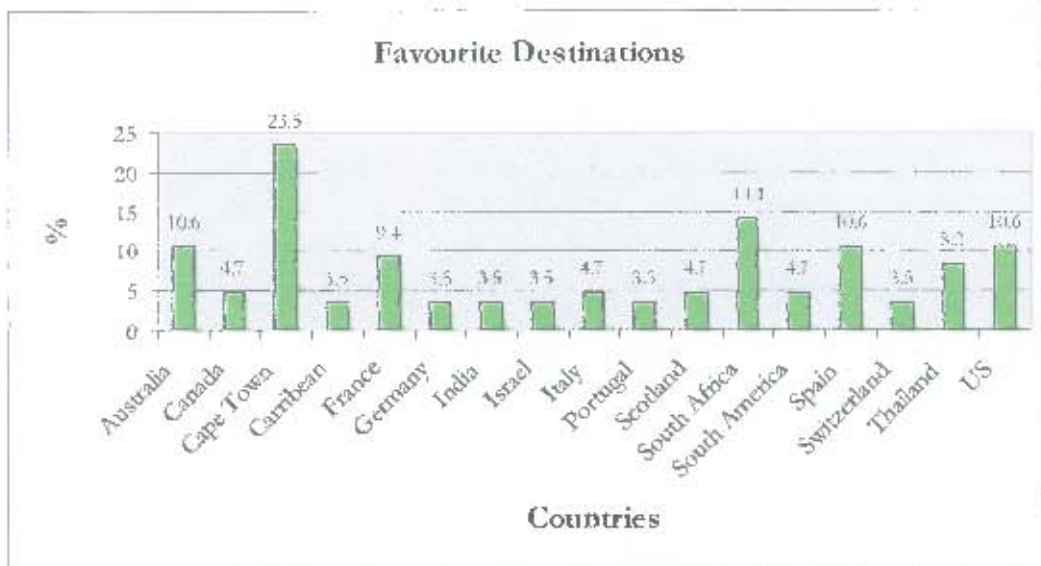


Figure 25: Favourite Destinations of Visitors to Cape Town

When respondents were asked what makes these destinations special, responses indicated the following: vibrant atmosphere and ambience (18.8%), friendliness of people (30.6%), natural beauty (29.4%), unique culture (24.7%), and good weather (17.6%) amongst others as can be seen in **Figure 26**. This implies that destination choice to a large extent is influenced by those factors. However, these results must be interpreted with caution given the inherent bias of respondents towards Cape Town. It is easier for a respondent to mention the strengths of a destination that they are currently visiting than to mention strengths of destinations that they have visited.

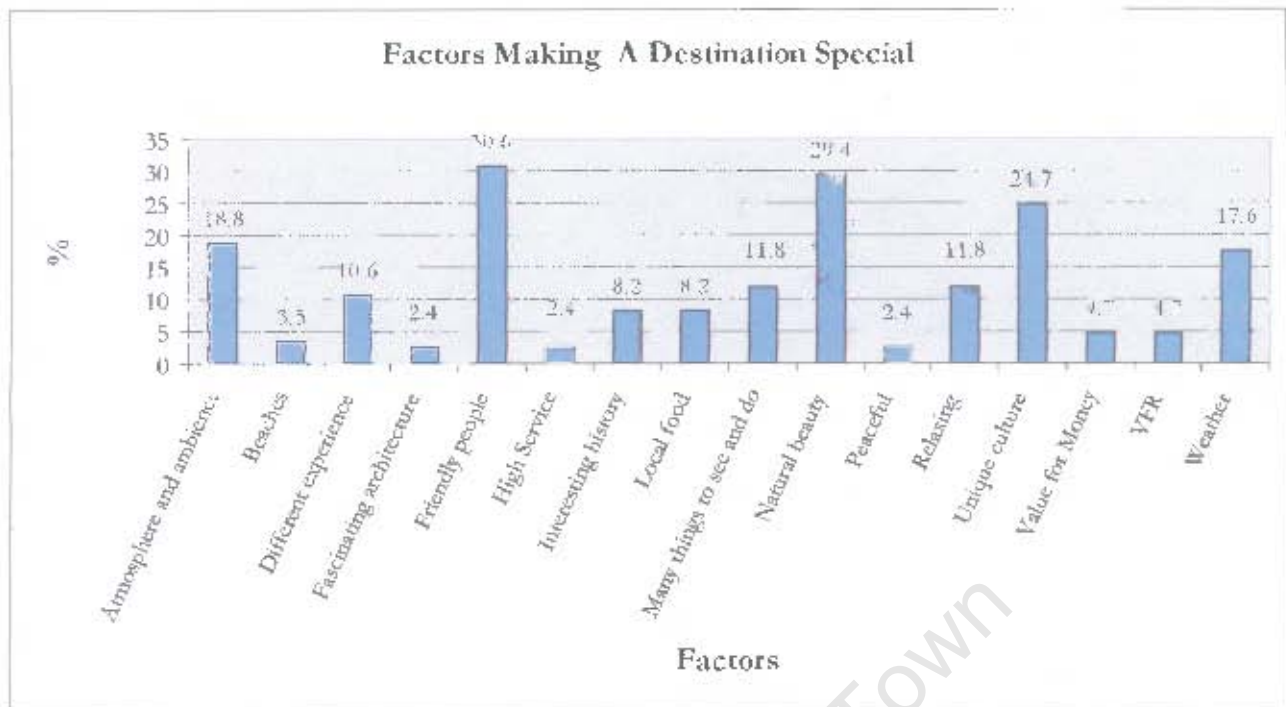


Figure 26: Factors that Make a Destination Special

Nevertheless, Cape Town compares favourably to competitors on all of the factors mentioned above. To ascertain such a statement respondents were asked 'how does Cape Town compare to other destinations they have been to?' This question led to some interesting answers that are as follows:

- 10.5% of respondents said that the destination is among the best in the world.
- 14.1% said that it could not be compared to any other destination.
- 11.7% said that the destination is just different from any other place they have been.
- 10.5% said it is on par with other international destinations.
- 8.2% said it is as good as anywhere else.
- 5.9% said that the destination offers an average experience.
- 3.6% said it offers a below average experience.

Other responses included the following:

- It is just like any other European city that is modern and westernised.
- It has a far simpler lifestyle than America or Europe.
- There is no other country that they have visited where there is such a huge contrast between the rich and the poor.

- It is less safe than many other countries they have visited.
- It offers a very unique product.
- It is more exciting than anywhere else.

In general, the results above show that Cape Town compares favourably or is even better than other destinations that have been visited by respondents. However, these criticisms cannot be ignored even though mentioned by few respondents. Safety seems to be one of the issues that is raised frequently but is mentioned by few respondents. This has potentially a lot to do with the negative media reports and negative word-of-mouth from South Africans living overseas about Cape Town that make potential visitors and visitors aware of how unsafe Cape Town can be.

Respondents were further probed on the favourable qualities of Cape Town as a destination. By far the variety of things to see and do (12.9%) and scenic beauty (12.9%) were the most favourable qualities of Cape Town followed by the friendliness of locals (11.8%), value for money (9.4%) and good service (3.5%). Other responses included diversity of culture, good food, vibrant city life, unique atmosphere, charming and relaxing city and good accommodation. To confirm that these factors are indeed strengths, respondents were asked about their most enjoyable experience in Cape Town. As can be seen in **Figure 27**, scenic beauty (8.2%) and hospitality of people (11.8%) feature prominently as strengths of the brand. Table Mountain and the beaches are part of the scenic beauty of the country and are unique to the destination. By far the ride up Table Mountain was the most enjoyable experience of international tourists. Other interesting experiences mentioned by respondents included: meeting black people, the coastline drive, garden route, the local women, whales and a combination of all the above.

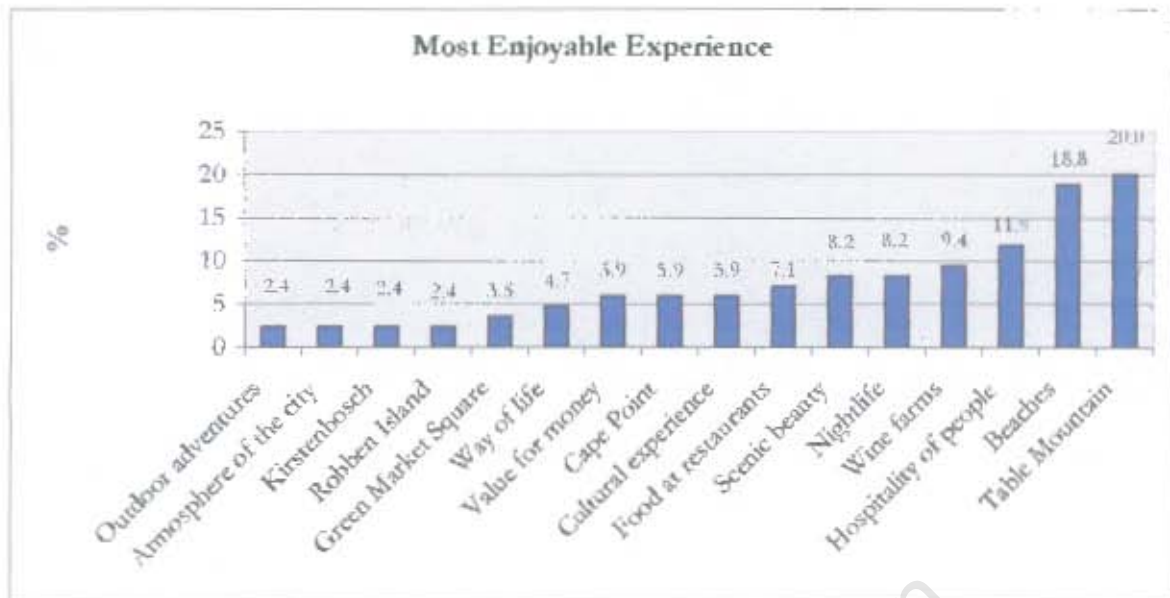


Figure 27: Most Enjoyable Experience of Cape Town

Sustainable competitive advantage can only be achieved through factors that are strengths but unique to a destination. Respondents were asked about what makes Cape Town unique as a destination. The scenic beauty (23.5%), Table Mountain (22.4%), and friendly people (16.5%) were among the most common answers mentioned by respondents as shown in **Figure 28**. It is therefore clear that the three above-mentioned factors must be used to market the destination. This has been the case in the past but it seems that marketing campaigns have been unsuccessful in positioning the destination effectively. It is not so much about which factors to use but more about how these factors are used to bring out the uniqueness of the destination. There should be some synergy between the factors that are marketed and the channels of communication that must convey a consistent message overtime to reinforce existing positive brand associations. Cultural diversity, variety of things to see and do, location at tip of Africa are all positive brand associations that need to be marketed effectively to create the desired brand knowledge.

If one considers the number of different responses that were mentioned by respondents about the uniqueness of Cape Town, it covers the entire spectrum of strengths that other destinations are perceived to have. Not all of these factors can be used though, what can be done is to use each unique factor for a different target market. For example, those visitors coming to Cape Town for outdoor activities need to be made aware of the consistently good weather. Cultural tourists should be aware of the diversity of historical

attractions available at the destination. However, there must be a common denominator that binds all these factors together to create one consistent image of the destination.



Figure 28: Uniqueness of Cape Town

### 3.2.10 BRAND PERSONALITY OF THE DESTINATION

**Objective 9: To describe any differences in brand personality of Cape Town and South Africa.**

The brand personality of a destination is moulded by past marketing campaigns, word-of-mouth from other visitors, and information gathered from the media and other sources. The most influential factor, however, is how the destination supra-brand is positioned internationally. The brand personality of Cape Town will be influenced to a large extent by how South Africa is positioned. Brand Cape Town will reflect some of the attributes of brand South Africa. To identify the brand personality of Cape Town, respondents had to envision themselves as being at a party where South Africa and Cape Town were invited as guests. They were then asked to describe how these two persons are similar or different in terms of their gender, the way they look, what they are wearing, the image they are trying to project, their activities/interests, the car they drive, their occupation, whether they have kids or not, the income they earn and lastly what kind of party it is. The

responses were varied but clear brand personalities emerged depending on whether they viewed South Africa as being young or old, black or white, and male or female. Cape Town has a much younger image than South Africa as can be seen from the comments that follow.

### **3.2.10.1 SOUTH AFRICA BRAND PERSONALITY**

#### **OLDER BLACK MALE**

37.1% of respondents described SA as being male. Of those who assigned a male gender to SA, 74.1% said that he was black with 5.9% describing him as Mr. Nelson Mandela. None of the respondents described SA as being a young white or coloured male. 76.9% of respondents thought that he is in his late forties or early fifties. He is wearing a traditional Zulu or Xhosa dress with some sort of leopard skin motif or an old suit. He is confident about his future because this is 'new' South Africa and he has hopes and dreams that will be realised now but could not be realised in the past. He is very patriotic and more connected to his land than his Cape Town counterpart. He lives in a village or some rural area. He enjoys good home-made food and leads a simple life. He is sort of a charismatic person. He stays on a farm owned by a white.

#### **How Does He Look?**

He looks a bit stern and is very serious and responsible. He has a very positive outlook on the future and tries to portray a far simpler image than his Cape Town counterpart.

#### **His Activities/Interests?**

Gardening, farming, enjoys walking, singing and dancing, helping others.

#### **His Car?**

No car or a Mazda/Datsun.

#### **His Occupation?**

Farm worker, gardener.

#### **Number of Children?**

Many, he is a family man.

#### **His Income?**

Low income – he is struggling

#### **OLDER WHITE MALE**

25.9% of respondents described South Africa as an old white male. He is in his late forties.

#### **How Does He Look?**

He is dressed in shorts and T-shirt. He enjoys eating biltong and speaks Afrikaans.

**His Activities/Interests?**

He likes hanging out with friends at local pubs, enjoys drinking beer and watching rugby.

**His Car?**

He drives an old bakkie or 4X4.

**His Occupation?**

He owns a farm and employs black workers or he works for a mining company.

**Number of Children?**

He has either two or three children.

**His Income?**

Middle to high income.

**YOUNGER BLACK MALE**

Of those who said that South Africa as a person is black, 23.1% said that he is young. He is also good looking and wears a soccer or rugby T-shirt and shorts but can be quite fashionable on occasions, he is more likely to die of AIDS and is aware of past injustices but trying to move on. He is looking for new opportunities in life to be successful.

**How Does He Look?**

Trendy, friendly and eager to please others, he has a keeping up with the 'Jones' attitude, tries to portray a wealthy image and is confident about his future.

**His Activities/Interests?**

Golf, eating out, clubbing, entertaining outdoors, sports, movies, enjoys drinking and gym.

**His Car?**

Audi, Polo Player, Golf, Toyota, BMW or Mercedes.

**His Occupation?**

Business man, banker, financial advisor, engineer, involved in IT, soccer player.

**Number of children?**

None or one young child.

**His Income?**

Middle income or rich.

### **OLDER BLACK FEMALE**

23.7% of respondents assigned a female gender to South Africa with 22.8% of sample assigning both gender to South Africa. The remainder of respondents said that they could not assign a gender to SA because of its diversity. None of the respondents described SA as a young white female. Of those who assigned a female gender to SA, 75.1% said that she was black. She is in her late forties or early fifties as described by 74.7% of respondents.

#### **How Does She Look?**

She is a strong woman with character and is wearing a traditional Xhosa or Zulu dress and usually dresses conservatively. She is motherly and wears a head wrap and an apron. She is proud of who she is and is in touch with her land and nature.

#### **Her Activities/Interests?**

Gardening, sewing, politics, cooking, looking after the children, going to church, socialising, dancing, watching soap operas and is intensely involved in church activities. She sings at the church.

#### **Her Car?**

No car – she usually takes the train or bus

#### **Her Occupation?**

She works on a farm, housewife, teacher, domestic worker, she works at a laundrette and her husband could be a taxi-driver.

#### **Number of Children?**

Many

#### **Her Income?**

Low – earns just enough money to make both ends meet

### **OLDER WHITE FEMALE**

Of respondents, 24.9% assigned a female gender to South Africa described her as being white. She spends lavishly and has achieved the goals that she set up for herself earlier in her life.

#### **How Does She Look?**

She is in her late thirties or early forties and is wearing a long low cut dress. She is trying to look younger than she is. She always carries a handbag.

#### **Her Activities/Interests?**

She enjoys reading and is wealthy. She enjoys shopping and often visits casinos. She enjoys being with friends and family.

**Her Car?**

She drives a BMW or Mercedes or Audi.

**Her Occupation?**

She is a tour operator or housewife or PR officer.

**Number of Children?**

She has one or two children.

**Her Income?**

She earns a middle income or relies exclusively on the husband pay cheque.

**YOUNGER BLACK FEMALE**

She is in her mid twenties (25.3% of respondents) and has braided hair. She is chubby.

**How Does She Look?**

She looks confident and smart. She is wearing a long floral skirt and dresses better than her means. She is successful and tries to portray an uncomplicated image.

**Her Activities/Interests?**

Cooking, reading, socialising with friends.

**Her car?**

Golf, Toyota Tazz

**Her Occupation?**

Waitress, social worker, works for the government, advertising company

**Number of Children?**

No children or one or two very young ones

**Her Income?**

Middle income or unemployed

**3.2.10.2 SOUTH AFRICA BRAND PERSONALITY ANALYSIS AND POSITIONING IMPLICATIONS**

The brand personality of South Africa is very stereotypical and contains a significant number of clichés influenced to a large extent by what international tourists see and hear from the media. Racial differences are still perceived as being the predetermining factor of the position (occupation, income, and activities/interests) that someone occupies in society. The 'whites' having the white-collar jobs and the 'blacks' having the blue collar jobs. However, international tourists seem to look at the younger generation

with hope – they are going to be successful and fulfil their dreams. New South Africa is going to make it. There is also a perception that SA as a person is older when compared to Cape Town. The charisma of the former president, Mr. Nelson Mandela is a significant component of brand South Africa. Negative media coverage about AIDS and apartheid in the past still dominates international visitors' perceptions of the destination. Respondents were also asked to describe the party Mr/Mrs/Miss South Africa is attending to contextualise how the brand is perceived in a social setting that has implications on how the brand is positioned currently and more importantly, on how it should be positioned. The party they are attending is either a braai or cocktail party with friends and family. There is a variety of food with a homely atmosphere. The party is quite simple with people talking and laughing, feeling comfortable with each other. They usually have such a party quite often. The music that is being played could be Jazz and they are relaxed and happy. The social setting that was described for South Africa suggests that the brand have a 'feel-home' aura, connection to one's roots, and a family type of destination. Perhaps these should be reflected in the brand positioning statement via brand associations.

However, it must be noted that given the small sample size, and the sampling method used, it cannot be ascertained that the above findings are representative of international tourists visiting South Africa. Nevertheless, suggestions can be made on how South Africa could be positioned in the future. As a brand South Africa could be positioned using 'tradition' as a background where traditional values and culture are emphasised. The brand must convey feelings of 'comfortable and homely country' where there is a contrast between the past and the future. The past emphasising where South Africans came from (hardships faced during apartheid regime) and the courage of this nation to forget and forgive to move forward. The future is bright, hopeful, and full of opportunities. In fact, the past is epitomised for example by a region such as Northern Cape (underdeveloped, high unemployment, and poverty) and the future by Cape Town (modern and vibrant city, good life, and cosmopolitan). The simple way of life, friendliness of people, traditional arts and crafts are some of the brand associations that could be emphasised when positioning South Africa. The charisma of the former president, Mr. Nelson Mandela, should feature prominently in the positioning of the brand.

### **3.2.10.3 CAPE TOWN BRAND PERSONALITY**

Cape Town as a brand is perceived to be younger than South Africa and racial differences still account for how international tourists' perceive the brand personality. None of the respondents described Cape Town as a young black person. He or she is either white or coloured.

### **YOUNG WHITE MALE**

None of the respondents described Cape Town as a young coloured or black male but 41.2% of respondents said that the gender of the brand is male and white. He is in his late twenties or early thirties.

#### **How Does He Look?**

He looks quite casual – board shorts and T-shirts but definitely wears the trendiest brand and latest fashion. Hairstyle is the ‘messy look’. He has his sunglasses permanently on his head. He might be a smoker. He can be condescending, over-confident, selfish, snobbish, arrogant and enjoys money. He is well spoken and educated. He is good looking, dynamic, adventurous, sporty, thin, tanned, independent, smart, and confident. He is laid-back and cool. He can be what the UK tourists call a ‘DINKIE’. He is stuck in old South Africa and may or may not be married.

#### **His Activities/Interests?**

Golf, yatching, sundowners on the beach, cooking, loves wine and beer, hanging out with friends, eating out, sports – rugby and cricket, fishing, clubbing and travelling.

#### **His Car?**

Mercedes, BMW, Audi, Ferrari, Porsche

#### **His Occupation?**

Graphic designer, works for an advertising agency, owns his own business, architect, marketer, businessman, insurance broker.

#### **Number of Children?**

No children

#### **His Income?**

High Income

### **YOUNG WHITE OR COLOURED FEMALE**

Of those who assigned a female gender (58.8%) to Cape Town, 70.2% said that she was white while the rest said that she was coloured. She is in her late twenties or early thirties. If she is white, she is definitely blond. If she is coloured, she has long dark hair and brown skin. She wears a summer dress, flip-flops and sunglasses or a colourful sarong.

#### **How Does She Look?**

She is sexy, elegant, smart, trendy, fun, polite, hospitable, modern, tanned, attractive, materialist, sophisticated, open-minded, care free, ambitious, confident, secure, relaxed and tries to project a very

European image of herself. She is fashion and label conscious and wears anything from overseas. She could be a beauty queen and enjoys being the centre of attraction.

**Her Activities/Interests?**

Partying, talking to others, clubbing, hiking, going to the beach, shopping, modelling, enjoys wine, reading, dining out, movies

**Her Car?**

Toyota Tazz, Golf, Audi, Volkswagen, BMW, Mercedes

**Her Occupation?**

Works in the tourism industry, PR officer, consultant, chartered accountant, model or even Woolworth's teller, secretary, lawyer, sales person.

**Number of Children?**

No children

**Her Income?**

Middle to high income. She earns more than her South African counterpart.

**3.2.10.4 CAPE TOWN BRAND PERSONALITY ANALYSIS AND POSITIONING IMPLICATIONS**

Again, the positioning of Cape Town as a brand must be different to that of South Africa. South Africa as a brand can be anchored in tradition, cultural values, birth-place of humanity, and African roots. Cape Town as a brand epitomises youth, excitement, adventure, lavish lifestyle, wealth, and achievement. These are two completely opposite destination experience that reflects the two different images that tourists hold in their minds. The marketing of the two brands must convey the essence of this difference, where Cape Town is an up-market destination that has an exclusivity aura whereas South Africa is more of a cultural experience than anything else. This does not mean that the cultural experience of Cape Town should be downplayed but rather it should be emphasised as being the synergy between the two brands. Cape Town should be a sub-brand of South Africa but the reality is that there is a higher awareness of Cape Town as a destination as opposed to South Africa among international travellers. The brand is almost like any other European city brand with a major difference being its location at the Southern tip of Africa

To further contextualise how Cape Town is perceived as a person, respondents were asked to describe the type of party Mr or Ms Cape Town is attending. The party is described as being well organised, high status with people in tuxedos, smoking cigars at an exclusive club/pub. There is grilled food or braai with a variety of other local and European dishes. The service is very good. The people attending the party seem to be

pretentious, posh and stylish. There are even a few celebrities and everyone knows each other. They are all relaxing and enjoying the good life. These findings reinforces that Cape Town is an exclusive destination for glamorous people. Their distinct way of life should be emphasised in marketing campaigns overseas where 'getting away from the stress of everyday life' could be a significant brand association. All the above are merely suggestions, further research needs to be carried out to confirm the findings using a more rigorous sampling technique and a larger sample.

### **3.2.11 PERCEIVED WEAKNESSES OF CAPE TOWN**

***Objective 10: To identify the perceived weaknesses of Cape Town as a holiday destination.***

Earlier findings indicate that crime and safety are perceived to be threats while visiting the destination. Safety was mentioned by 8.2% of respondents as being a factor that influences destination choice. A negative image is a deterrent in destination choice and could be a possible reason for the low tourism growth in the Western Cape. Respondents were asked about whether they were warned about any negative aspects of the destination and by whom. The results show that 61.1% of respondents were warned about negative aspects of the destination compared to 38.9% that were not. By far crime is the one factor that respondents were warned about before coming to Cape Town. The safety of tourists at night is another major concern. Of those who were warned about negative aspects, 23.4% said that it came from friends, 4.7% from locals, 2.3% from hotel staff, 7.1% from travel agents, 3.5% from family, 11.7% from media, 5.9% from SA overseas, 5.9% from other travellers. Other negative aspects that were mentioned to visitors before their arrival include the following:

- Stay away from townships
- Don't use ATMs at night
- Beware of pickpockets
- Don't forget the high incidence of AIDS
- Don't stop at red robots at night
- Bad service

Four respondents had been mugged while visiting Cape Town while another two had their car broken into, one had her flat broken into and one was harassed by street kids. Despite these incidents, these tourists said that their experience of Cape Town as a whole has been good but they are unlikely to ever forget about it

though. Respondents were then probed on why did they come anyway despite having negative perceptions about the destination. The following were said:

- 14.11% mentioned that every city has crime and one need to be cautious like anywhere else. I did not believe the negative aspects and was curious to see whether it was true.
- The destination offers something different and is cheap.
- I tend to experience things for myself rather than believing other people.
- I wanted to visit family and friends.
- The natural beauty of the country fascinated me.
- I don't think that the situation is as bad as it seems to be.

To confirm negative factors affecting brand Cape Town, respondents were asked to describe their least enjoyable experience. By far the poor public transport (12.9%) of Cape Town was the least enjoyable experience of tourists followed by the unpredictable weather (11.7%), and feelings of unsafety at night (7.1%). Other negative experiences mentioned by tourists include the following:

Many street children	Car/accommodation broken into
Being mugged	Poor road signs
Seeing somebody else getting mugged	So many townships
Homeless people on the street	Traffic congestion
Huge disparity between rich and poor	Long flight to Cape Town
Long queue at immigration at Cape Town International	Bad service at restaurants
The way white people talk about others	

Moreover, respondents associated the following unfavourable qualities with Cape Town: poor transport/infrastructure (11.76%), crime (5.9%) and many poor people (4.7%). Other unfavourable qualities include:

- The city is too cosmopolitan.
- The city lacks an African touch.
- There are too many beggars and street children.
- The city has less historical interests such as museums and art galleries when compared to Europe.
- Poor service standards.
- Litter everywhere and streets are dirty.

- Poor sense of punctuality among people.
- There is a feeling of unsafety looming over the city.

Thus one can conclude that the major weaknesses of brand Cape Town are its infrastructure, especially public transport, high number of beggars and street children, safety and perhaps poor service in some instances. The issue of safety was probed to find out how safe tourists felt in Cape Town. Tourists felt rather safe but they were concerned about their safety at night. One must realise that the perception of safety is relative to factors such as crime level in one's own home country, safety perceptions in other countries one has visited, occurrence of any incident at the destination, and policing in the country amongst others. The findings showed in **Figure 29** below should be interpreted carefully in light of the factors mentioned above. A tourist from Israel will feel safer in Cape Town than a tourist from Europe because safety perceptions in his/her home country is worse than that in Cape Town. The threshold of what is considered a safe place is different for every person.

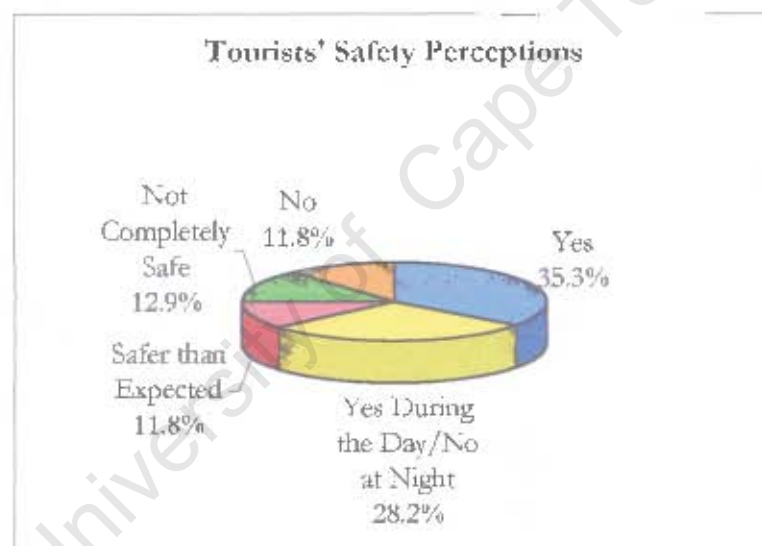


Figure 29: Safety Perceptions in Cape Town

These weaknesses are not always easily corrected as they involve the co-operation of many stakeholders in the industry. Warning visitors about safety and security before their visit, for example, may instill a sense of fear among them but they cannot be left in the dark as well. This illustrates one of the many dilemmas that tourism authorities are faced with in this country. However, until tourism is given its due recognition as an engine of growth in the South African economy, these weaknesses will remain as they are. International travellers need to be made aware of these weaknesses as opposed to letting them to find out once they are

here. They might be dissatisfied with the destination experience and thus it is a lost opportunity to spread positive word-of-mouth and induce repeat visits.

### 3.2.12 AWARENESS AND PERCEPTIONS OF LOGOS USED TO MARKET CAPE TOWN

*Objective 11: To determine awareness and perceptions of the various logos used to market Cape Town as a holiday destination.*

Respondents were shown three logos – Cape Metropolitan Tourism, Cape Town Tourism and Western Cape Tourism – and were asked to comment on the design and feelings about the logos. They were not told which logo belongs to which destination marketing organisation.

#### 3.2.12.1 CAPE METROPOLITAN TOURISM LOGO



Only 4.7% of respondents had seen the logo before their arrival to Cape Town and 5.9% had seen it during their trip.

##### Positive comments about the logo

- They like it.
- It is the most representative of Cape Town as it symbolises the product offering.
- It reminds them of the sun, sea, mountain, flowers/fynbos, and vineyards.
- It evokes a sense of Africa and nature in general.
- It is colourful and depicts the scenery of Cape Town.
- The terracotta colours give it an African feel.
- It is catchy without being an eyesore.

##### Negative comments about the logo

- It stands for Cape Town major attractions only and has no appeal due to lack of creativity.

- It is not very obvious what each thing stands for.
- It is too simple.
- It looks like a stamp.
- It is too segregated and it does not flow.

### 3.2.12.2 CAPE TOWN TOURISM LOGO



Only 5.9% of respondents had seen the Cape Town tourism logo before visiting the destination while preparing their trip and 3.5% of respondents had seen the logo during their trip.

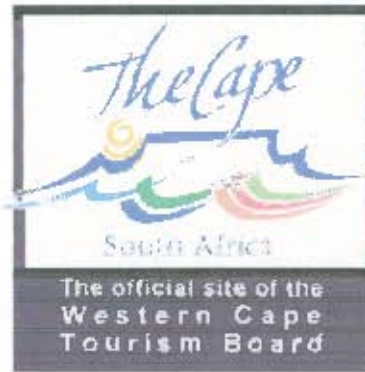
#### Positive comments about the logo

- They like it.
- It reminds them of the sea, clouds, waves and beaches.
- It is simple.
- It is something harmonic and complete with nice colours.
- It represents the globe and Cape Town marine life.
- It looks like a whale.

#### Negative comments about the logo

- Don't like it.
- It is too plain.
- They can't see how it relates to Cape Town.
- It looks like a sloppy motif on a T-Shirt.
- It represents two dolphins jumping – is that appropriate for Cape Town or Hermanus or Durban?

### 3.2.12.3 THE CAPE LOGO



3.5% of respondents had seen the logo prior to their trip to Cape Town while 16.5% had seen the logo during their trip.

#### **Positive comments about the logo**

- It represents the colours of the SA flag, nature, Table Mountain and diversity.
- It symbolises national pride.
- It depicts the sea, sun, mountain, beach and fun.
- It is very colourful and catchy.
- It captures the heart of Cape Town.
- They prefer it to the other logos.

#### **Negative comments about the logo**

- It does not capture the beauty of Cape Town.
- It is too obvious and overdone in a way.
- It is abstract and looks like a house.
- It is attractive but not emotive.
- It is too commercial and has a 'cheap' feel.

Overall there seems to be a general preference for the Cape logo but it needs some improvement to better represent the diversity of product offering. It can be something more abstract that captures the beauty of the province while leaving an 'African' feel that is emotive of the unique experience that the destination offers. All logos have low awareness and perceptions are not always favourable. The importance of brand

elements such as logos were emphasised in the literature review and clearly the above logos contribute minimally to a favourable image of the destination.

### 3.2.13 ATTITUDE OF TOURISTS TOWARD BRAND CAPE TOWN

#### *Objective 12: To understand tourists' attitude toward brand Cape Town.*

A positive attitude towards a destination goes a long way towards that destination being considered as a holiday getaway. The more positive the image and expectations, the greater the likelihood that the destination is selected as the next holiday destination. However, expectations must be matched by experience in order for the visitor to disseminate positive word-of-mouth, recommend the destination to others and plan future visits. The overall attitude toward a destination brand will influence the above mentioned factors, that is, the more favourable the overall attitude toward the brand, the greater the likelihood of positive word of mouth being disseminated, the destination being recommended to others and the visitor revisiting the destination.

When respondents were asked about their overall attitude towards brand Cape Town, it seemed that they held a positive attitude. Respondents said that they will definitely recommend the destination to others but more importantly, they will tell others the following: scenic beauty (31.8%) of Cape Town, friendliness of locals (20%), the variety of things to see and do (15.3%) and the good value for money (11.8%) as shown in **Figure 30**. Other responses include: cultural diversity, amazing atmosphere, different lifestyle, good weather, good entertainment, wonderful nightlife, high service standards, excellent restaurants, good wine, safe destination, and cosmopolitan city.

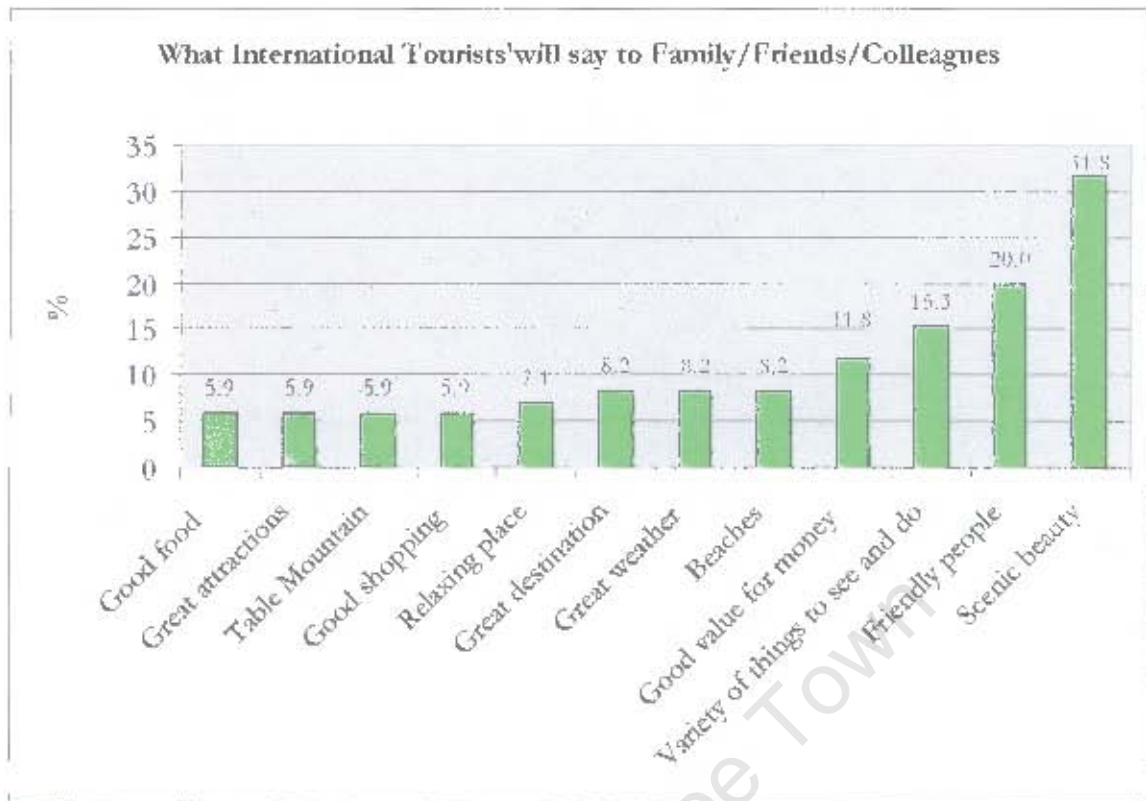


Figure 30: Positive Factors that International Tourists will Mention to Others

When probed for positive or negative statements that they will make to others, the following interesting answers came up:

**Positive comments**

- Cape Town is not like the rest of Africa.
- It offers enough to keep anyone occupied and interested for a long time.
- It is the ultimate holiday experience.
- The city is not third world at all.
- It is not as unsafe as people think it is.
- This is a place that everyone must visit.
- Garden route is God's coast and Cape Town is the gateway to it.
- The city is a world-hidden treasure/beauty.
- There is a strong sense of community that will help rebuild SA.
- Make sure you get out of the city, there is more to see than just Cape Town.

### **Negative comments**

- You must be careful when you go out.
- You must hire a car to get around because lack of public infrastructure.
- People can be pretentious.
- The level of prostitution, begging, poverty and number of street children are disturbing.
- I never really felt safe because there is a constant thought of crime.
- I will tell other people about the negative things as it makes for more sensational stories.
- Do not expect great service.
- There is lingering racism in the city.
- The weather can be very unpredictable.

As can be seen these comments clearly reflect the identified strengths and weaknesses of the brand. These comments merely reconfirm earlier findings. Nevertheless, 83.1% of respondents said they would like to come back to Cape Town. Those that would not revisit said the main reasons were that there are many other places to visit in the world, the flight is too long to get here, and that they do not feel completely safe

### **3.2.14 CAPE TOWN VIS-A-VIS OTHER SOUTH AFRICAN CITIES**

***Objective 13: To determine perceptions of Cape Town vis-à-vis other cities in South Africa.***

Of respondents 63.5% had travelled to other cities/areas in South Africa. While 31.4% had travelled to Johannesburg, 22.2% had travelled to Durban, and 20.3% to the Garden Route. Other areas visited included: Northern Province, Eastern Cape, Transkei, Mpumalanga, West Coast, Drakensberg, Kruger Park, Pretoria, Port Elizabeth and Pietermaritzburg. Respondents more or less thought that Cape Town is very different from any other regions in South Africa. The only similarity was in terms of perceptions of poverty. Respondents thought that poverty and begging can be seen anywhere in South Africa. More interestingly though was respondents comments on how Cape Town is different from other places in South Africa.

### **Positive comments**

- Cape Town is one of the safest cities in South Africa.
- Cape Town is more modern compared to the rest of the country.
- There is more cultural diversity in Cape Town.
- Cape Town people are friendlier and far more pleasant than their Johannesburg counterparts.

- Cape Town is more cosmopolitan than Durban.
- Cape Town has a much more diverse product offering.
- Cape Town is slightly wealthier than the rest of the country. Stellenbosch and Franschoek are seen as being extremely wealthy.
- Cape Town is far more laid back than anywhere else.
- Cape Town has much more interesting natural and man-made attractions.
- Cape Town is more 'touristy' compared to Johannesburg which is very 'bussiny'.
- Cape Town has the best scenic beauty.
- Cape Town has much more vibrant atmosphere.
- It is easier to get around Cape Town.

### **Negative comments**

- Durban has a much better atmosphere than Cape Town.
- Communities live very separately in Cape Town.
- Drivers are 'wilder' in Cape Town.
- People are cliquy, insular and individualistic in Cape Town.

The above comments show that Cape Town compares favourably to other cities and areas in South Africa. By far positive comments outweigh negative ones. Clearly, Cape Town offers a much better experience than anywhere else in South Africa. The positioning of brand Cape Town must nevertheless have something in common with other brands such as Durban or Johannesburg to create a positive and memorable link with overall brand South Africa. The essence of having a supra-brand and sub-brands is that there must be a meaningful link between all the brands. Despite Cape Town being the most recognised brand among international travellers, the lack of meaningful positive associations thereof with brand South Africa is likely to hurt brand Cape Town in the long-term through conflicting image and message projection. As such, brands such as Cape Town, Johannesburg,, Durban and Garden Route should be sub-brands of South Africa with each region or city positioned in such a way that they are complementary to each other rather than being substitutes. The positioning must definitely emphasise on the uniqueness of the city or region though.

### 3.2.15 CONSTRUCTS FOR LOGO DESIGN AND BRAND POSITIONING

***Objective 14: To identify constructs that can be used for designing a logo and positioning of brand Cape Town.***

Destination marketing organisations can draw on three tools to implement an effective image of a place namely, slogans/positioning themes, visual symbols/logo and events. While a catchy slogan or visual symbol might capture attention, it cannot do the whole job of marketing a destination. The image of a destination must be valid and communicated in many ways through several channels if it is to succeed and take root. In fact, a good slogan and logo provide a platform from which the image of a destination can be further amplified. Destination marketing organisations typically find it difficult to choose a slogan, logo or positioning theme because most destinations are multidimensional. The most effective logo/slogan/positioning themes are versatile and flexible, yet grounded in reality.

Respondents were asked to pick one thing that they would use to market Cape Town to their friends, colleagues and relatives to identify the most memorable moments of their holiday that could be used in positioning Cape Town. Table Mountain (32.3%) was by far the one thing that international tourists would use to market Cape Town. While 18.4% of respondents said they would market the scenic beauty, 15.4% would market the beaches along with 10.8% of respondents marketing the combo of mountain/beach/wildlife. The variety of things to see and do would be marketed by 9.2% of respondents and 7.7% would market the atmosphere. The cultural diversity (7.7%), the way of life (7.7%), the good weather (6.2%), friendliness of people (6.2%), and the good value for money (4.6%) would also be marketed. Other responses included: Cape Point, township tours, historical value, nightlife, wine routes, its location at the tip of Africa. Clearly, there is no consensus among visitors on the single most appealing benefit/characteristic of brand Cape Town.

Since Table Mountain was the most common answer, respondents were asked if Table Mountain embodied what the destination had to offer. While 85.8% of respondents had visited Table Mountain only 57.7% thought that it does embody what Cape Town has to offer. Further probing revealed the following views expressed by respondents:

- Cities are associated with landmarks, Cape Town has Table Mountain and thus it represents the city world wide.

- There is so much more to Cape Town than Table Mountain, it is after all just a mountain.
- Table Mountain is scenically beautiful and a big monument in the city, it has the strongest association with Cape Town.
- The city is so diverse and Table Mountain certainly does not embody the friendliness of local people.
- The people and culture is a better representation of the city than Table Mountain.
- Table Mountain is an oddity in Cape Town.
- Table Mountain provides a sense of how the people perceive themselves and the mountain embodies the laid back atmosphere of the city.
- It represents Cape Town as from up there, you can see both the beauty of the city but also the townships (poverty).

Thus, Table Mountain is an integral part of Cape Town's offering and should be used as one of the attributes to differentiate Cape Town from the rest of the world but it should not be the sole image that is projected of the destination. The culture, scenic beauty and friendliness of the locals are as important to the brand. The difficulty lies in projecting constructs such as friendliness, vibrant atmosphere and culture to international travellers to create a memorable image of the destination.

Also respondents were asked to comment on the culture of Cape Town, 72.9% said that Cape Town has a unique culture, 23.5% believed that the culture is not unique while the rest of respondents had no opinion. The following insightful comments on culture emerged:

**Positive comments**

- It is a melting pot of English, African and Malay flavours – all brought together in a 'vibey', laid-back atmosphere.
- It is a true definition of a rainbow nation.
- It is cosmopolitan and has a blend of variety.
- It is very relaxed and assorted with respect to individual cultures.
- It is an eclectic mixture of so many races and nationalities.
- The coloured community adds a lot of distinctiveness to Cape Town's culture – they are friendly, warm and loving.
- People are respectful and friendly – it comes naturally to them and is not an act as in my home country.

- It is a blend of ambition, wealth and youth, a city that is still exploring the possibilities of becoming a first-class city while still remaining in touch with its African culture.
- The people have very little money but they still seem to be so happy- they have a lust for life.
- People don't get upset easily and have a great sense of humour.
- Everybody is so different but somehow they are uniquely Capetonian.
- They 'braai' all the time.

### **Negative comments**

- There is hectic racism in Cape Town.
- People seem to be so obsessed about having a unique culture but spend a lot of time imitating others rather than creating their own identity.
- It is very European and has very little 'Africaness' in it.
- People don't like to talk – it seems to be a cultural thing.
- The culture of Whites, Blacks, Coloureds and Indians are too diluted to say that the culture is unique.
- People are conservative and seem to be stuck in the past.

Once more, positive comments far outweigh negative ones. The culture of Cape Town can be considered to be unique and thus is an appropriate construct to be used in positioning the destination. The difficulty lies in capturing the essence of that culture and projecting it through visual images, words and themes that are simple to communicate and remember.

Furthermore, a projective technique was used to identify the feelings that brand Cape Town evokes among respondents. The projective technique consisted of respondents having to visualise that they are walking down a corridor with doors on the left and right hand side. On the doors names of regions/countries and cities are written for example, Australia on the left door and Sydney on the right. Similarly, they come across South Africa on the left and Cape Town on the right. They were then asked to open the Cape Town door and describe what they see, feel, hear, smell and taste. They were then asked to describe the colours they could see and what about the destination they associated with those colours. Finally, they were asked to describe how they fit in the room and whether the experience was authentic or fake.

### **WHAT RESPONDENTS SAW?**

Nice scenery (3.6%)	Mountains (18.1%)
Table Mountain (52.7%)	City surrounded by sea, mountains and beach (9%)
Big houses/buildings (3.6%)	V&A Waterfront (5.5%)
Harbour (3.6%)	People of different colours (7.2%)
Many People (12.7%)	Culture (3.6%)
Artefacts (3.6%)	Food and fruits (3.6%)
Sun (7.3%)	White beaches (23.6%)
Black people (3.6%)	Blue sky (5.5%)
Green market square (5.5%)	

The following were mentioned by one respondent only: Cape Point, Smog, Townships, Winelands, Street Hawkers, Rain, Robben Island, Wildlife and Clock Tower. Thus respondents can recall popular tourist attractions and Table Mountain being again the most dominant image in the tourist mind.

### **WHAT RESPONDENTS FELT?**

Relaxed (20%)	Pleasant (5.5%)
Good (5.5%)	Excited (12.7%)
Happy (20%)	Calm (9%)
Warm (31%)	Windy (3.6%)
Exploring/Adventure (3.6%)	Positive (3.6%)
Uncomfortable (3.6%)	Welcomed (5%)
Peaceful (7%)	

The following were mentioned by one respondent only: Chilled out, Comfortable, Cool, Sea breeze, Fun, Nice, Enthusiastic, Apprehensive, Scared, Hopeful, Indifferent, Cautious, and Intrigued. Some of these words such as relaxed, happy, excited and warm need to be translated into positioning themes that convey these feelings that eventually become word associations with Cape Town. The challenge remains to translate these feelings into a slogan/logo or visual images that reinforce the uniqueness of brand Cape Town.

### **WHAT RESPONDENTS HEARD?**

Variety of music (20%)	Wind blowing (14.5%)
Noise made by animals/birds (7%)	Sea waves/Ocean (36.3%)
Nothing (5%)	People chatting (18%)

Sea gulls (5%)

Traffic (12.7%)

Different languages (6%)

The following were mentioned by one respondent only: Stillness, Rain drops, Street noises, Laughter of children, Harbour horn and Street hawkers selling things. These responses indicate the type of ambience that prevails at the destination. It is a lively atmosphere with sea waves being the most prominent noise that respondents could recalled.

### **WHAT RESPONDENTS SMELLED?**

Fresh air (16.3%)

Sea breeze (25.4%)

Salty ocean (27.2%)

Good food (5.5%)

Seaweed/kelp (5.5%)

Sweat (5.4%)

The following were mentioned by one respondent only: Fruits, Wine, Seafood, Curry, Spicy, Borewors, Barbecue, Braai, Rooibos tea, Fresh bread, Jasmine, Nothing, Fresh flowers, Rain, and Dust. These words add character to the destination brand and help to create a unique experience for the visitor who wants to know how Capetonians live on a daily basis. The sea is featured prominently once more in terms of what visitors can smell at the destination.

### **WHAT RESPONDENTS TASTED?**

Biltong (9%)

Wine (25.5%)

Nothing (14.5%)

Seafood (14.5%)

Fresh fruits (10.9%)

Good food (9%)

Beer (9%)

Salty air (18%)

Other responses include: Curry, Ostrich steaks, Traditional food, Ice cream, Cocktails and Buns. The variety of local food available is not well marketed. Respondents struggled to answer the question. The obvious response being wine as Cape Town is renowned world wide for its good quality wines. The local cuisine must be emphasised more in future marketing campaigns to promote the destination. 'Braai' and 'biltong' are typically South African and it seems that respondents are aware of that. They should be used to position the destination as tourists associate those words with Cape Town.

### **WHAT COLOURS RESPONDENTS SAW?**

Respondents saw the following colours and associated the following words with the colours mentioned.

Blue (sea and sky) – 85.5%

Yellow (sun, warm weather and people) – 29%

Green (nature and flora) – 78.1%

Grey (weather and city centre) – 7%

Red (war, past history and nightlife) – 20%

White/Beige (beaches and people) – 32.7%

Black (the past and people) – 12.7%

Brown (land) – 14.5%

Rainbow colours – 16.3%

Orange (sunsets and fruits) – 14.5%

Previous findings showed that respondents had a preference for the Western Cape Tourism Board logo that incorporated most of the colours that respondents associated with Cape Town. The new logo for Cape Town must be designed to reflect colours such as blue, yellow, green, red, white and black. It is then the responsibility of destination marketing organisations, through their marketing campaigns, to associate the desired words with those colours. Words such as excitement and relaxation can be conveyed through colours such as red for the former and blue for the latter. The colour of a logo influences the attitude of a potential visitor towards a destination. A colourful logo, for example, can evoke images of fun, diversity, excitement, and happiness. These are words that will strengthen a destination brand. Colours are significant in determining the emotional aspects that a brand conjures in the mind of a potential visitor. Thus colours used for Cape Town logo must be in line with feelings and emotions that the destination is trying to convey to potential visitors.

Finally respondents were asked to describe how they fit in the room. Of respondents 5% said that they were only a few steps in the room and observing what was happening around them. Another 52.7% mentioned that they were in the middle of the room and feeling very much involved within the environment they were surrounded by. These might be the visitors who were very satisfied with the destination experience. Yet 5.5% of respondents said they were watching from outside the door and not really in touch with what was happening around them. These might be visitors who did not have their expectations met and therefore could be dissatisfied visitors. A further 29% were standing at the door still thinking of what was happening in the room. These might be visitors who were unsure of what the destination had to offer which again points to ineffective marketing campaigns overseas. Other responses included walking in the room and feeling out of place but welcomed. Of respondents 34.5% mentioned that they were impressed by the activities happening in the room and 54.5% claim that the destination offers an authentic and unique

experience as compared to 9% who said that the experience was fake. It can thus be concluded that the destination does offer an authentic experience but visitors are not always sure of what to expect. On the whole although people found the experience authentic and pleasing, some of them still had a sense of apprehension toward becoming too intrigued or involved with their stay in Cape Town. This could be attributed to the attitude of some 'locals' towards international tourists who felt that an insular and cliquey vibe surrounded the people of the city.

This concludes the section on the findings of the in-depth interviews that were conducted in Cape Town among international tourists. These findings together with the ones from the literature review will now set the tone for the empirical research that was conducted among 585 international tourists. But before that, the conclusions formulated from the above findings are reported.

### **3.3 PRIMARY QUALITATIVE RESEARCH CONCLUSIONS**

The following conclusions are drawn from findings of the in-depth interviews.

#### **3.3.1 FACTORS INFLUENCING DESTINATION CHOICE**

- International tourists attach considerable importance to good climate/weather (32.9%) when selecting a destination for holiday purposes. This is because Europeans plan their holidays to avoid the difficult winter in Europe. On the other hand, weather in Cape Town can be quite unpredictable especially in winter. Thus weather is an element that is outside the control of a destination and not much can be done to control it.
- Value for money is an important consideration in destination choice as mentioned by 25.9% of international tourists. This is a factor that underlies the competitiveness of Cape Town as a holiday destination. It is an attribute that must be consistently marketed to establish it as a brand association with South Africa and Cape Town.
- Culture (22.4%) is another important factor affecting destination choice. This factor is a strength of Cape Town as it offers a unique cultural experience. This attribute must be emphasised in marketing activities to create a rich image of the destination.

- Surprisingly in-depth (8.2%) interviewees seem to assign less importance to safety and security as being a factor influencing destination choice. Yet there seems to be major contradictions in terms of how international tourists perceive safety levels in Cape Town. Perceptions of safety seem to improve once they get to the destination. This indicates the existence of a potential gap between expectations and perceptions of safety among international tourists.
- 17.6% of international tourists considered scenic beauty to influence destination choice. This attribute is not only a strength of the destination but also one that differentiates it. Nevertheless, what is considered scenically beautiful differs from one tourist to another. Therefore emphasising the right attributes to each segment of the tourism market is critical for success of a destination.
- Demographic and psychographic characteristics of tourists influence the factors that they consider important when selecting a destination.

### **3.3.2 IMPORTANCE OF DESTINATION IMAGE**

- International tourists underrate the importance of destination image in destination selection, as only 29.4% of them said that image was very important. This is perhaps due to the fact that their perceptions of what constitutes the image of a destination are limited to the visual image of the place only. They have limited understanding of the various components contributing to the overall image of a destination. Nonetheless, it is one factor that influences destination choice as only 24.7% of tourists said image has no or minimal importance in destination selection.

### **3.3.3 SOURCES OF INFORMATION**

- Family and friends are the most important source of information that potential travellers consult in their decision-making process. These sources significantly influence expectations and perceptions of Cape Town. Thus both positive and negative word-of-mouth are likely to be conveyed to the potential traveller. Ensuring high satisfaction levels with destination experience is therefore key to create a positive impression of Cape Town.
- Family (17.6%) and friends (44.7%) are also the most important source of recommendation for Cape Town. Attracting new customers is therefore dependent on how current visitors perceive the

destination. A negative experience will deter potential travellers to visit as their source of recommendation will view the destination in a negative way and discourage them from visiting.

- Marketing activities through the use of above-the-line media to attract first time visitors seem to be ineffective since only a few respondents heard of Cape Town from travel magazines (10%), TV (10%), newspapers (7%) and guidebooks (6%). Marketing intermediaries such as travel agents are also not pushing the destination to customers as only 4.7% of them said that the destination was recommended by their travel agent. Perhaps better incentives will encourage them to push the destination as a holiday base. Further research is needed to ascertain these findings.

### **3.3.4 TOURISTS' EXPECTATIONS OF CAPE TOWN**

- International tourists' expect to see a city that offers scenic beauty (17.6%) and safety to be a concern (14.1%). Yet 11.8% found the city safer than expected. On the whole international tourists have a fairly good opinion of what to expect in terms of attractions. But of more importance is whether these expectations are matched by reality. There seems to be a good correlation between what visitors expected to see and why they chose Cape Town as a holiday destination.
- Table Mountain (35.3%), beach (22.4%) and wine farms (22.4%) are also what tourists expect to see since these are the attractions that sources of recommendation emphasise to potential visitors. Yet, a significant number (12.9%) of international visitors said that nothing was emphasised to them by sources of recommendation prior to their visit. Thus, the unique attributes of Cape Town need to be communicated more vigorously.

### **3.3.5 TOURISTS' PERCEPTIONS OF CAPE TOWN**

- Perceptions are not always matched with expectations as 68.2% of respondents mentioned that their perceptions had changed while visiting the destination. They mentioned safety (18.8%), scenic beauty (10.6%), friendliness of locals (5.9%) and the extent of 'westernisation' of the city (7.1%) as the primary factors that contributed to this change in perception. These factors should be marketed more consistently as they emphasise the positive aspects of the destination.

- Negative aspects of the destination that influenced perceptions were poverty (4.7%), poor weather (10.6%), high number of street children (3.5%), poor infrastructure (4.7%), and poor perceptions of safety at night (3.5%). Thus wrong expectations are created with regards to those factors. Marketing communications must acknowledge that those factors are weaknesses of the destination but that the strengths far outweigh those weaknesses to avoid customer dissatisfaction.

### **3.3.6 IMAGES USED TO CONSTRUCT CAPE TOWN AS A HOLIDAY DESTINATION**

- 41.2% of international tourists mentioned that Table Mountain is the image that the destination is most associated with. Yet 22.4% of them said that they could not recall of any images that are used to market the destination in their home country. This ties in with respondents that mentioned they had no expectations prior to their visit. This is of serious concern as a destination with no image or confusing images is most likely to be rejected as a potential holiday destination at the earliest stages of the decision making process.
- Images of scenic beauty (16.5%) and the beach (30.5%) are the other images that in-depth interviewees associate with Cape Town. Brand associations of international tourists with South Africa revealed similar findings but there is a more prominent association of the brand with wildlife (25.8%) and safaris/game parks (14.1%). Of concern is the fact that 14.1% of respondents associate the supra-brand (South Africa) with crime. This negative brand association is likely to influence perceptions of Cape Town as well.
- The diversity of opinions on which images to use to market the country suggest that the Joint Marketing Initiative is far from reaching consensus among industry stakeholders on images to use. The images that international tourists can identify the most with should guide this choice process. The image should be simple and differentiated to avoid customer confusion with other destinations.
- Negative brand associations with Cape Town include crime, unsafe and many street children. In contrast to brand associations with South Africa crime is associated more with South Africa (14.1%) than with Cape Town (2.4%). It was interesting to note that 17.6% of international tourists mentioned Cape Town

as a brand association with South Africa. The former defines the latter to some extent and perhaps should be the one brand that is marketed consistently on the international scene.

### **3.3.7 ATTRACTIONS ARE VIEWED POSITIVELY**

- The attractions of Cape Town are viewed positively by international tourists. While 34.7% of international tourists rated attractions as being good, 94.1% of respondents agreed that the appeal of Cape Town is enhanced by attractions such as Table Mountain, Cape point and Kirstenbosch.

### **3.3.8 ACCESSIBILITY OF THE DESTINATION IS GOOD**

- 61.2% of international tourists found Cape Town to be easily accessible but concerns were expressed in terms of airfare that was perceived to be expensive and the long flight hours. It needs to be highlighted that this survey was carried out off-peak season where accessibility should not be a problem as revealed by the above findings. Yet the empirical research will confirm whether Cape Town is accessible during peak season.

### **3.3.9 INFRASTRUCTURE IS PERCEIVED TO BE RELATIVELY GOOD BUT PUBLIC TRANSPORT IS VIEWED NEGATIVELY**

- Of international tourists, 52.9% rated infrastructure in general as good but 45.8% said that public transport needs desperate improvement. This is an area that needs immediate attention to improve the image of the destination and experience thereof.

### **3.3.10 ACCOMMODATION IS PERCEIVED TO BE GOOD**

- None of the international tourists surveyed had any negative comments about their accommodation. They rated their accommodation as being either excellent (23.5%) or very good (30.6%) or good (42.4%). Respondents particularly liked the value for money, service, cleanliness, and friendliness of staff at their place of accommodation.

### **3.3.11 SERVICE STANDARDS ARE PERCEIVED TO BE GOOD**

International visitors (24.7%) perceived the service standards to be good in general. This is an attribute of the destination that must be communicated to the various target markets more vigorously. Positioning a destination along the lines of excellent service is a source of sustainable competitive advantage. It is difficult

for any destination to emulate one that is positioned in international travellers' minds as offering outstanding service because such a perception is formed through many critical factors being performed consistently well overtime.

### **3.3.12 AMBIENCE OF CAPE TOWN IS LAID BACK**

- Of international visitors, 48.2% described the way of life in Cape Town be laid back. Yet the city also evokes feelings of excitement, fun and relaxation that should feature prominently in future marketing campaigns.

### **3.3.13 CAPETONIANS ARE PERCEIVED TO BE HOSPITABLE**

- Only 8.2% of international visitors said that they were surprised by the friendliness of locals. Therefore international visitors expect the city to be friendly as 11.8% of them described their most enjoyable experience as being the hospitality of locals, and 16.5% mentioned that friendliness of locals make Cape Town unique as a destination.

### **3.3.14 FACTORS THAT DIFFERENTIATE CAPE TOWN**

- Of international tourists, 29.4% described natural beauty as a factor that makes a destination special. While 8.2% maintained their most enjoyable experience of Cape Town to be the scenic beauty, 23.5% mentioned the same factor as being unique to Cape Town. Therefore this factor can be used to position the destination as it has immense potential to sustain competitive advantage.
- Table Mountain is the strongest factor that differentiates Cape Town as mentioned by 22.4% of international tourists. This attribute is one that 44.7% of international visitors associate with brand Cape Town while 20% described it to be their most enjoyable experience. This is one image that has been used successfully to position Cape Town and will continue to do so in the future.
- A unique culture makes a destination special as mentioned by 24.7% of international visitors. Cape Town has a unique culture as mentioned by 10.6% of in-depth interviewees. This is an attribute that has not been used properly to position the destination. Future marketing campaigns should emphasise the unique melting pot of culture that gives Cape Town such a distinct personality.

- Friendliness of locals (16.5%), variety of things to do (12.9%), and the beach (10.6%) differentiate the destination as well. These attributes were thought to be unique to the destination by in-depth interviewees. For some (16.5%) the combination of mountain and sea close to each other is unique to the destination.

### **3.3.15 BRAND CAPE TOWN AS A PERSON**

- When compared to brand South Africa as a person, brand Cape Town is younger and predominantly white, better educated, earn more money, live a lavish lifestyle and has no children. Brand South Africa on the other hand, is perceived to be older than Cape Town, black, earning a lower income than his/her Cape Town counterpart and having many children while being employed in a blue-collar job. Race, age and what the media portrays about the country largely influenced these brand personalities. They tend to be stereotypical of the image that one would have in his/her mind during the apartheid era. As a result, this shows that respondents cannot be expected to know much about the destination and perhaps the rich history of the country along with the major transformation that has occurred should be emphasised more in marketing communication campaigns.
- Brand Cape Town cannot be positioned in the same way as brand South Africa. There needs to be some synergy between the two but clearly the brand personalities are distinct. Cape Town is perceived to be an 'exclusive' destination for the rich by international visitors. It has nothing to do with wildlife because of its cosmopolitan feel and therefore cannot be promoted along the lines of the 'big five'. The one attribute that both brands have in common is scenic beauty and could potentially be used to link the two brands in visitors' minds.

### **3.3.16 VARIOUS LOGOS ARE INEFFECTIVE**

- The logos used by the various destination marketing organisations are not well understood by visitors. They are not always associated with what the organisations want them to represent. The difficulty international visitors had in coming up with ideas and images that the logos conjure up in their minds indicate that the logos visual impact and value as branding tools are minimal. The low awareness indicates the ineffectiveness of the logos to communicate something meaningful about the destination. However, respondents had a slight preference for the Western Cape Tourism Board logo as they thought the colours were representative of Cape Town's product offering. It was felt that this particular

logo is attractive but not very emotive. Tourists were also confused about Cape Town and the Cape, which seem to suggest that Cape Town tourism industry is still not speaking with one voice. There are too many messages contradicting each other leading to international tourist being confused about whether 'The Cape' is another name for Cape Town or whether it is an entirely new destination.

### **3.3.17 ATTITUDE OF TOURISTS TOWARDS BRAND CAPE TOWN**

- International tourists had an overall positive attitude towards brand Cape Town. Their high intentions of revisit (83.1%) and willingness to recommend the destination to others suggest that they view the brand in a positive light. They will tell family, friends and colleagues about the variety of things to see and do (15.3%), friendliness of locals (20%) and value for money of the product offering (11.8%).

### **3.3.18 CAPE TOWN RATES FAVOURABLY AGAINST OTHER CITIES IN SOUTH AFRICA**

- Cape Town is considered to offer a better experience than any other cities in South Africa. Positive comments about Cape Town's experience far-outweighed negative ones. However, there should be some consistency between how Cape Town and all other provinces or cities are marketed. Each brand must be unique in its own way but they should all have a South African 'flavour' to create strong links in the mind of the visitor and potential visitors. Johannesburg is perceived to be less safe than Cape Town and respondents would hesitate to go there for holiday purposes.

### **3.3.19 CONSTRUCTS FOR A LOGO OR SLOGAN**

- International tourists (42.3%) said that Table Mountain is a landmark of Cape Town but it should not be used as the only logo or image of the city. The diversity of products and experiences on offer cannot be captured through Table Mountain only. Culture and friendliness of locals should be incorporated in any logo or slogan used to market the city. Yet it is more difficult to capture culture and friendliness as constructs in a logo than Table Mountain. Industry stakeholders were of the same opinion since only 43% agreed that Table Mountain should be the logo for Cape Town. The essence of the city is diversity of experiences in a beautiful environment surrounded by warmth and hospitality of people that display a sense of pride for their country. A different way of life in a relaxing atmosphere surrounded by vast open landscapes that have a unique flora and fauna.

### 3.3.20 CAPE TOWN'S BRAND FINGERPRINT

SIGHTS	SOUNDS
<ul style="list-style-type: none"> <li>• Table Mountain</li> <li>• White beaches</li> <li>• Diversity of people</li> <li>• Sun</li> <li>• Mountains</li> </ul>	<ul style="list-style-type: none"> <li>• Variety of music</li> <li>• Wind blowing</li> <li>• Sea waves</li> <li>• People chatting</li> <li>• Traffic</li> </ul>
FEELINGS	SMELLS
<ul style="list-style-type: none"> <li>• Relaxed</li> <li>• Happy</li> <li>• Warm</li> <li>• Excited</li> <li>• Calm</li> </ul>	<ul style="list-style-type: none"> <li>• Fresh air</li> <li>• Salty ocean</li> <li>• Sea breeze</li> </ul>
TASTE	COLOURS
<ul style="list-style-type: none"> <li>• Fresh fruits</li> <li>• Wine</li> <li>• Biltong</li> <li>• Beer</li> <li>• Seafood</li> <li>• Salty air</li> </ul>	<ul style="list-style-type: none"> <li>• Blue (sea, sky)</li> <li>• Yellow (sun, warmth, people)</li> <li>• Green (nature, flora)</li> <li>• Red (war, past history, nightlife)</li> <li>• White (beach, people)</li> <li>• Black (people, past history)</li> </ul>

It can be concluded that Cape Town is a well-defined destination in the minds of international tourists during their visit but not necessarily prior to their visit. Future marketing campaigns should communicate images of Table Mountain, warmth of people, feelings of relaxation and excitement, winelands, blend of different cultures, good weather and beautiful scenery. A logo should incorporate colours such as blue, yellow, green, red, white and black as embodied by the South Africa national flag.

The city still needs to find a unique concept such as the 'Big Apple' for New York city around which it can market itself and build the brand. Successful destinations are using not only their generic attractions but combining them with the ambience and way of life of local people to market themselves and these are having unprecedented effects. The marketed image at present is too restrictive since Table Mountain and beaches are the strongest associations with the brand and many unique selling points such as culture, diversity of experiences, warmth of people have to date been overlooked.

The conclusions drawn from the in-depth interview findings are by no means representative of opinions of international tourists visiting Cape Town. They serve merely as a guideline for understanding the research problems in more depth. These findings can only be validated through the empirical research that must confirm the opinions stated above through a rigorous sampling method. Nevertheless, these findings combined with the literature review findings provide a sound base for formulating research hypotheses. Consequently the following research hypotheses are proposed.

### 3.4 RESEARCH HYPOTHESES

Based on the findings from the literature review and in-depth interviews, the following hypotheses are suggested for the quantitative study. The hypotheses are presented in null format so that the relevant statistical analyses will lead to the rejection of the null.

#### 3.4.1 FACTORS INFLUENCING DESTINATION CHOICE

**Main Hypothesis:** There is more than one factor that influences destination choice.

**Sub Hypotheses:**

- H<sub>1</sub>:** Good climate/weather is **not** considered to be an important factor influencing destination choice.
- H<sub>2</sub>:** Value for money is **not** an important consideration influencing destination choice.
- H<sub>3</sub>:** Scenic beauty is **not** an important consideration influencing destination choice.
- H<sub>4</sub>:** Personal safety is **not** considered to be an important factor influencing destination choice.
- H<sub>5</sub>:** Culture is **not** an important factor influencing destination choice.
- H<sub>6</sub>:** Destination image is the single most important factor influencing destination choice.
- H<sub>7</sub>:** There are **no** significant differences in mean importance rating of factors influencing destination choice based on international tourists' demographic characteristics.
- H<sub>8</sub>:** There are **no** significant differences in mean importance rating of factors influencing destination choice based on international tourists' travelling characteristics.

#### 3.4.2 SOURCES OF INFORMATION INFLUENCING THE CHOICE OF CAPE TOWN AS A DESTINATION

**Main Hypothesis:** Word-of-mouth has the most influence on the choice of Cape Town as a destination.

**Sub Hypotheses:**

- H<sub>9</sub>:** Word-of-mouth is **not** the most influential source of information on Cape Town.

**H<sub>10</sub>:** There are **no** significant differences in international tourists' perceptions of the most influential sources of information based on demographic characteristics.

**H<sub>11</sub>:** There are **no** significant differences in international tourists' perceptions of the most influential sources of information based on travelling characteristics.

### **3.4.3 INTERNATIONAL TOURISTS' EXPECTATIONS OF CT**

**Main Hypothesis:** International tourists have the wrong expectations.

**Sub Hypotheses:**

**H<sub>12</sub>:** International tourists do **not** expect a city that is developed.

**H<sub>13</sub>:** International tourists do **not** expect a city that offers a unique experience.

**H<sub>14</sub>:** International tourists do **not** expect to see crime.

**H<sub>15</sub>:** International tourists do **not** expect to see poverty.

### **3.4.4 INTERNATIONAL TOURISTS' PERCEPTIONS OF CT**

**Main Hypothesis:** International tourists have better perceptions than expectations.

**Sub Hypotheses:**

**H<sub>16</sub>:** International tourists do **not** perceive the city to be friendly.

**H<sub>17</sub>:** International tourists do **not** perceive the city to be beautiful.

**H<sub>18</sub>:** International tourists perceive the city to offer very little of an 'African' experience.

**H<sub>19</sub>:** Cape Town does **not** rate favourably on safety.

**H<sub>20</sub>:** Cape Town does **not** rate favourably on value for money.

**H<sub>21</sub>:** Cape Town does **not** rate favourably on destination image.

**H<sub>22</sub>:** Cape Town does **not** rate favourably on attractions.

**H<sub>23</sub>:** Cape Town does **not** rate favourably on accessibility.

**H<sub>24</sub>:** Cape Town does **not** rate favourably on infrastructure.

**H<sub>25</sub>:** Cape Town does **not** rate favourably on ambience.

**H<sub>26</sub>:** There are **no** significant differences in international tourists' mean ratings of attributes that influence the choice of Cape Town as a destination based on demographic characteristics.

**H<sub>27</sub>:** There are **no** significant differences in international tourists' mean ratings of attributes that influence the choice of Cape Town as a destination based on travelling characteristics.

### 3.4.5 CAPE TOWN BRAND IMAGE

**Main Hypothesis:** Cape Town has no appealing brand image.

**Sub Hypotheses:**

- H<sub>28</sub>: Cape Town has **no** distinct image according to international tourists.
- H<sub>29</sub>: Scenic beauty is **not** the most important attribute that differentiates Cape Town.
- H<sub>30</sub>: Cape Town has an overall negative image as a destination.
- H<sub>31</sub>: Cape Town has an image worse than any other cities in South Africa.

### 3.4.6 ATTITUDE OF INTERNATIONAL TOURISTS TOWARDS BRAND CAPE TOWN

**Main Hypothesis:** International tourists have a positive attitude towards brand Cape Town.

**Sub Hypotheses:**

- H<sub>32</sub>: International tourists are **not** likely to revisit.
- H<sub>33</sub>: International tourists are **not** likely to recommend the destination to others.
- H<sub>34</sub>: International tourists are **not** satisfied with the destination experience.

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# CHAPTER 4

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## QUANTITATIVE RESEARCH METHODOLOGY

This chapter begins with an overview of how the questionnaire for the quantitative research was designed. The sample design section is then introduced to highlight the reasons behind international tourists being chosen as respondents for this survey.

## **4.1 QUESTIONNAIRE DESIGN**

The literature review and in-depth interview findings were the backbone of the various attributes that were included in each sections of the questionnaire. The hypotheses for this study along with the funnel approach that was suggested by Churchill (1995) were also used to design the questionnaire. The funnel approach is an approach to question sequencing that gets its name from its shape, starting with broad questions and progressively narrowing the scope. The questionnaire was structured and undisguised aiming at measuring international visitors' perceptions of brand Cape Town. The author made use mostly of close-ended questions but open-ended ones were particularly necessary for the word-association technique that was used to measure brand associations with Cape Town.

The questionnaire designed to capture international visitors perceptions of brand Cape Town can be seen in **Appendix C**. Nominal, ordinal and interval scales were used to design the questionnaire. Predominantly likert-type scales were employed to capture visitors' perceptions and attitudes. The questionnaire comprised of five sections. The first section covered respondents' travelling characteristics followed by factors influencing the choice of a destination in general and factors that influenced the choice of Cape Town as a holiday destination. The influence that sources of information have on destination choice was also measured. These sections were designed in order to prove hypotheses one to eleven and hypotheses nineteen to twenty-seven.

As fieldworkers were being used to administer the questionnaire, the opening line on the questionnaire had to be standardised to avoid fieldworker bias in getting co-operation from the sought target respondents. Screening questions were used to identify international tourists. The first screening question was "Are you an international tourist?" to identify the desired respondents. The second screening question "Have you spent more than 4 days in Cape Town" was necessary to ensure that the respondents knew enough about the destination to complete the questionnaire successfully. A similar question was used by George (2003) to ensure that respondents had sufficient exposure of the various destination mix elements for his survey about safety and security perceptions in Cape Town.

Using the funnel approach suggested by Churchill (1995), the questionnaire was designed starting with broad questions. **Question 1** was aimed at eliciting the various destinations that international tourists had visited in the last four years. Their perceptions of the quality experience provided by Cape Town would be relative to the quality of experience enjoyed at other destinations that they had recently visited. Therefore it was necessary to identify the other destinations that the respondents had visited recently. **Question 2** and **Question 3** were included to identify whether travelling characteristics were a significant discriminator of expectations and perceptions of respondents.

The in-depth interviews showed that 40% of respondents travelled with friends and 34.1% travelled with family. Family and friends together were the most important source of recommendation about Cape Town. Consequently to validate these findings it was necessary to find out if international visitors usually travelled alone or with family and friends leading to the inclusion of **Question 4** in the questionnaire. The Cape Metropolitan Tourism visitor research for 2001 showed that on average the size of travelling party of intentional tourists was 2.6 persons, which pinpoints to visitors not travelling alone. A similar question was used by Vaughan and Edwards (1999) in their study to identify the size of travelling party to Algarve and Cyprus. **Question 5** is a word association technique used to identify top of mind awareness of attributes of a destination. These attributes are usually the ones that differentiate a destination from its competitors (Keller, 1998). The qualitative research has already shown that words such as Table Mountain (44.7%), beaches/sea (30.5%) and scenic beauty (16.5%) tend to be strongly associated with the brand.

**Question 6** was designed to measure the attributes that international tourists considered important when selecting a destination as a potential holiday base. The literature review showed that factors such as climate and scenery are universally important in destination selection while the importance of attributes such as local cuisine, value for money are dependent on the destination under consideration (Hu and Ritchie, 1993). Heung et al. (2001) found that safety, cultural diversity, variety of things to see and do, amenities, friendly people influenced travellers' choice of Hong Kong as a destination. Andreu et al. (2000) used similar attributes to determine the factors that were important to tourists' when selecting Spain as a holiday destination. A number of other studies such as Baloglu (1997), Lubbe (1998), Vaughan and Edwards (1999), Murphy (1999), Chen and Hsu (2000), Chaudhary (2000), Joppe et al. (2001) were used as references to build the list of attributes used in Question 6. These attributes were further researched through the in-depth interviews that showed good climate and weather (32.9%) as being the most important factor when selecting a destination for holiday purposes. Attributes such as culture (22.4%), value for money (25.9%), scenery

(17.6%) and many things to see and do (15.3%) were also of importance to international tourists when selecting a destination. Hence these attributes were included in the questionnaire.

**Question 7** was included to specifically identify why Cape Town was chosen as a holiday destination. The question was designed in an open-ended question format. **Question 8** was designed to reinforce findings from the in-depth interviews that family and friends were the most influential source of information about the destination. Vaughan and Edwards (1999) and Murphy (1999) used a similar approach to identify to identify the most influential sources of information when international travellers are considering a number of destinations for holiday purposes. In-depth interview findings showed that 61% of respondents heard about Cape Town from word-of-mouth. Of respondents, 44.7% and 17.6% mentioned that friends and family recommended Cape Town respectively.

Echtner and Ritchie (1993) concluded that destination image is captured through functional and psychological characteristics. Most destination image studies have used a list of attributes to measure image (Pearce, 1982; Um and Crompton, 1992; Echtner and Ritchie, 1993; Walmsley and Young, 1998; Baloglu and McCleary, 1999; Murphy, 1999; Andreu et al., 2000; Heung et al., 2001), this study is no different. Consequently, the brand image of Cape Town was measured through the use of a list of attributes. The attributes themselves were derived from the literature review and in-depth interview findings.

The above-mentioned authors were used as references to build the list of attributes to be used in **Question 9** and **Question 10**. These attributes were further refined using in-depth interview findings. Keller (1998) is of the opinion that brand image when elicited through a list of attributes leads to a more holistic picture of the brand. However, such a list does not indicate the strength of association of these attributes to the brand. Consequently, **Question 11** was designed to measure the strength of association of the attributes used in question ten with brand Cape Town.

Differentiation of brands lies at the heart of marketing (Winkler, 1999). Brand Cape Town should be differentiated from other local and international brands for it to be successful. Such differentiation should be based on attributes that are meaningful to consumers and highlights the uniqueness of a destination (Bordas, 1994). In-depth interview findings showed that friendly people (30.6%), natural beauty (29.4%), and culture (24.7%) were among the factors that make a destination special to visitors. With specific reference to Cape Town, visitors thought that scenic beauty (23.5%), Table Mountain (22.4%), friendly

people (16.5%), combo of sea and mountain (16.5%) were unique to the destination. Consequently, these attributes were factored in **Question 12** to identify attributes that differentiated Cape Town from other international destinations. **Question 19** was aimed at identifying attributes that differentiated Cape Town from other local brands such as Durban, Pretoria, and Johannesburg.

Section three of the questionnaire also aimed at quantifying visitors' expectations and perceptions of Cape Town. This was done through the use a battery of nineteen statements (**Question 13**). These statements were derived from the in-depth interviews and would help to prove or disprove hypotheses twelve to fifteen, sixteen to eighteen and twenty-four. The fourth section was designed to measure international tourists overall attitude toward brand Cape Town based on hypotheses thirty-two to thirty-four. Overall attitude of consumers towards a brand is the foundation for the actions and behaviours that consumers take with the brand (Keller, 1998). A favourable attitude contributes to positive word-of-mouth, brand loyalty and is a significant source of positive recommendation about a brand (Klenosky et al., 1998).

Consequently **Question 14**, **Question 15**, **Question 16** and **Question 17** sought to capture visitors' overall attitude towards brand Cape Town. These questions were intended to prove or disprove hypotheses thirty-two to thirty-four. The fifth section measured how the city rates vis-à-vis other South African cities based on hypothesis thirty-one while the final section measured respondents' demographic characteristics.

## **4.2 SAMPLE DESIGN**

The respondents for this survey were chosen based on a probability sampling procedure to obtain results that were validated and reliable. The questionnaire was pilot tested to identify errors, omissions and ambiguities relating to the various questions and projective techniques used. The survey instrument was pilot tested among 20 international tourists at Camps Bay beach on a random basis. No major problems occurred except for some international tourists who complained that the questionnaire was too lengthy. No changes were brought to the survey instrument as the author felt that for all objectives to be met and all hypotheses to be proved or disproved all questions in the survey instrument were relevant. The sample design is now considered in more depth.

## 4.2.1 SAMPLE POPULATION

The sample population was defined as all international tourists visiting the eight major attractions of Cape Town during the months of October, November, December 2001 and January 2002. These attractions were visited by the following number of international tourists - V&A Waterfront (83.3%), Table Mountain (52.6%), Cape Point (60.2%), Kirstenbosch Gardens (31.5%), Robben Island (20.7%), Hout Bay Harbour (25.1%), Wine Route (42.6%) and Two Oceans Aquarium (23.5%) (CMT visitor research, 2001). The sampling frame was defined as the attractions and they were also the chosen sampling points for this survey.

However, due to the following limitations, some of the attractions were not sampled. Table Mountain was left out due to their lack of co-operation in allowing fieldworkers to carry out the survey on their premises. Due to time and budget constraints, the wine route was left out but replaced by Cape Town International Airport departure lounge as a sampling point because it was thought to be an ideal location to get tourists' perceptions of the brand once they have '*consumed*' their holiday. Hout Bay proved to be very limiting in terms of the number of tourists visiting the place daily. Consequently, international tourists were interviewed at the following beaches: Hout Bay, Camps Bay, Blaauwberg and Clifton. George (2003) used a similar methodology to measure tourists' fear of crime while on holiday in Cape Town. The locations chosen for his study as sampling points are more or less similar to the ones chosen for this study. These locations as suggested by George (2003) provide a reasonable representation of the target population bearing in mind the constraints of randomly surveying dynamic and mobile tourists as respondents.

As mentioned before probability sampling was chosen as the sampling procedure but within probability sampling, a **systematic sampling** procedure was used. This is not to say that a probability sample is more representative than a non-probability sample but rather a probability sample allows for the explicit measurement of the sampling error likely to occur. A systematic sample offers one of the easiest ways of sampling the population of interest as it involves selecting every  $n^{\text{th}}$  sampling element after a random start. A systematic sample can often be made more representative than a simple random sample (Churchill, 1995: 614). In this case every 2<sup>nd</sup> person that was an international tourist was interviewed. Chen and Hsu (2000) used systematic sampling in their study on perceived images of overseas destination by Korean tourists. They systematically sampled every 10<sup>th</sup> individual that passed the surveyors in the airport main buildings.

Given that a probability sampling procedure was chosen, it was essential to ensure that respondents were systematically surveyed. The fact that no list of tourists visiting each sampling point was available to do a proper systematic sampling, the method used by Vaughan and Edwards (1999: 360) was applied. They suggested that sample selection should be based on interviewers drawing an imaginary line through which people will walk, setting a start time for the first interview and that time stopping every second person that crossed that line. This method was particularly useful to exercise control at Hout Bay, Camps Bay, Blaauberg and Clifton beaches.

The screening question "Are you an international tourist?" helped to identify the target population. Sampling points used at the V&A Waterfront included the Two Oceans Aquarium entrance, the Robben Island Ferry entrance, and the VAT office. It was easy to control that every second person that was an international tourist was interviewed because the screening question was asked to every person going through the entrances of the above-mentioned attractions. The same procedure was applied at Cape Point and Kirstenbosch Gardens. The target population was interviewed after they had visited those attractions. Cape Town International Airport departure lounge proved to be the most efficient setting and sampling source. All international tourists sitting in the lounge had completed their holiday and the physical setting of the lounge provided a very good sampling list. The interviewers systematically sampled every second international tourist.

To ensure that responses obtained were not biased towards any particular gender, a quota of 50% female was imposed. There was no quota in terms of age and country of origin of respondents. This helped fieldworkers to complete their task within the given time frame. Furthermore, in an attempt to get a representative cross-section of visitors, the surveys were completed at different times and days during the period November 2001 to January 2002.

The choice of a sample size is dependent on a number of issues that has to be weighed one against the other to determine the optimal sample size given budget and time considerations. Methods of determining sample size also rest on considerations such as type of sample and homogeneity of population. George (2003) used a sample size of 438 to investigate tourists' perceptions of safety and crime in Cape Town while Vaughan and Edwards (1999) used a similar sample size to measure perceptions of Algarve and Cyprus as tourist destinations. However, Baloglu (1997: 224) and Murphy (1999: 29) rightly suggest that more surveys have to be distributed to get a representative sample. They distributed 1212 and 1080 surveys respectively to get a

response rate of approximately 700 fully useable questionnaires. Thus there is a divergence of opinions on how to determine sample size in a situation where the target population is dynamic and mobile.

International tourists are very difficult to sample as they constantly move around and are pressed for time as Cape Town offers a lot of attractions. Cape Metropolitan Tourism uses a sample size of approximately 250 for their annual international tourists' survey. Over the years they found that such a sample size generates a margin of error of approximately 6% (CMT visitor research, 2001). Consequently a sample size of 500, twice that of Cape Metropolitan Tourism, was chosen for this particular survey. Yet following Baloglu (1997) and Murphy's (1999) suggestion that more surveys needs to be completed to end up with 500 useable questionnaires and given the likelihood of high refusals from international tourists to participate, the sample size was increased to 650.

At this point the choice of a data collection method was critical. The choice is dependent on a number of factors such as type of population, question form, question content, response rate, costs, available facilities, and duration of data collection. Data collection spanned over seven weeks and three fieldworkers were employed. Face-to-face (personal) interviews were considered to be the most appropriate method of data collection as it gives the respondent an opportunity to clarify questions and concepts. A response rate of 90% (585/650) can be computed given that **585 international tourists** completed the survey properly. The break down in terms of the number of questionnaires that were filled in at each attraction is as follows:

- Cape Point – 28.1%
- Beaches (Camps Bay, Hout Bay, Blaauwberg and Clifton) – 25.2%
- V&A Waterfront (Two Oceans Aquarium, Robben Island, VAT Office) – 20.3%
- Cape Town International Airport – 17.3%
- Kirstenbosch – 9.1%

#### **4.2.1.1 SURVEY ERRORS**

Given that the questionnaire was pre-tested, survey errors were minimised. The only problems encountered were communication difficulties between respondent and interviewer, unwillingness to complete the questionnaire, lack of understanding of how to rank attributes and bad weather conditions that affected data collection at Kirstenbosch.

### 4.3 DATA PREPARATION

The raw data obtained from the questionnaires went through preliminary preparation before it can be analysed using Statistica. The quality of results obtained from performing statistical analyses is dependent on how well the data was prepared and converted into a suitable format for analysis. The field edit was undertaken to identify omissions, ambiguities and errors in the responses. The field edit was followed by a 'central office' edit, which involves identifying inconsistencies and further scrutiny of the questionnaires to ensure that the data is 'clean' enough to proceed to data coding.

### 4.4 DATA CODING AND CAPTURING

All open-ended questions were coded while close-ended questionnaires were already pre-coded on the questionnaire. The monthly income of international tourists was converted from their home currency to dollars. The raw data was captured in Statistica and checked for data entry errors.

### 4.5 DATA TABULATION AND ANALYSIS METHODS USED

The first step before using any multi-variate technique involves analysing each question or measure by itself. This was done by tabulation of the data. Tabulation involves counting the number of cases falling into the various categories (frequency counts and distributions), and generating descriptive statistics namely means or percentages to locate outliers or mistakes in data capturing. Also, it involved representing the data in a visual format through the use of bar charts, histograms and pie charts.

**Cross tabulations** were used to identify relationships between pairs of variables. The Pearson Chi-square value showed whether there was a significant relationship between two categorical variables at a 5% level of significance. The null hypothesis of no association between two variables was rejected if the p-level was less than 0.05.

**Factor analysis** examines the associations among a large set of original measures and aims at reducing them to a smaller subset of explanatory factors for easier interpretations. It is used to identify underlying constructs or dimensions within a large set of observable measures. This technique was used to identify potential image dimensions that were discernible to international tourists.

**Cluster analysis** like discriminant analysis is a classification technique. However unlike discriminant analysis where the group classifications are known in advance, cluster analysis assumes unknown group memberships of objects and proceeds to separate the objects into distinct groupings, each with its own identity. This method allowed international visitors to be classified in different groups according to their image expectations and perceptions.

**Analysis of variance (ANOVA)** for example, was used to test equality of means across image attributes between first time and repeat visitors. On the other hand, **correspondence analysis** is a perceptual mapping technique. It looks for associations between objects and the attributes, which describe the objects. Perceptual map showing associations between cities of South Africa and attributes such as level of service, safety, and quality of accommodation was useful to understand how Cape Town is positioned vis-à-vis its domestic competitors.

University of Cape Town

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# CHAPTER 5

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## QUANTITATIVE RESEARCH FINDINGS

This chapter reports the findings of the empirical research conducted among international visitors. A total of 585 questionnaires were used for data analysis. The results are displayed according to the specific hypotheses developed earlier. The discussion of the findings will begin with profiling of respondents in terms of gender, age, country of origin and income. Then the travelling characteristics of international visitors are displayed. Thereafter all hypotheses are proved or disproved.

## 5.1 DEMOGRAPHIC PROFILE OF SAMPLE

The profile of the sample in terms of gender shows that the survey polled almost equal number of males (49%) and females (51%). This was possible because of the quota imposed within the systematic sampling method used to collect the data. The age distribution (**Figure 31**) shows that 21.5% of respondents were between the ages of 30 to 35 years old while 1.5% of the sample refused to disclose their age. The average age of respondents for this survey was 40 years old, which indicates that the destination attracts a slightly older target market. In contrast, the qualitative research polled younger respondents with an average age of 27 years old. However, it must be realised that usually elder travellers are the ones with the disposable income and time to spend on travel and leisure activities. The annual Cape Metropolitan Tourism international visitor research for 2001 showed that 61.4% of international tourists surveyed were between the ages of 26 to 50 years old. Most respondents (71.7%) for this survey are between the ages of 24 to 53 years old.

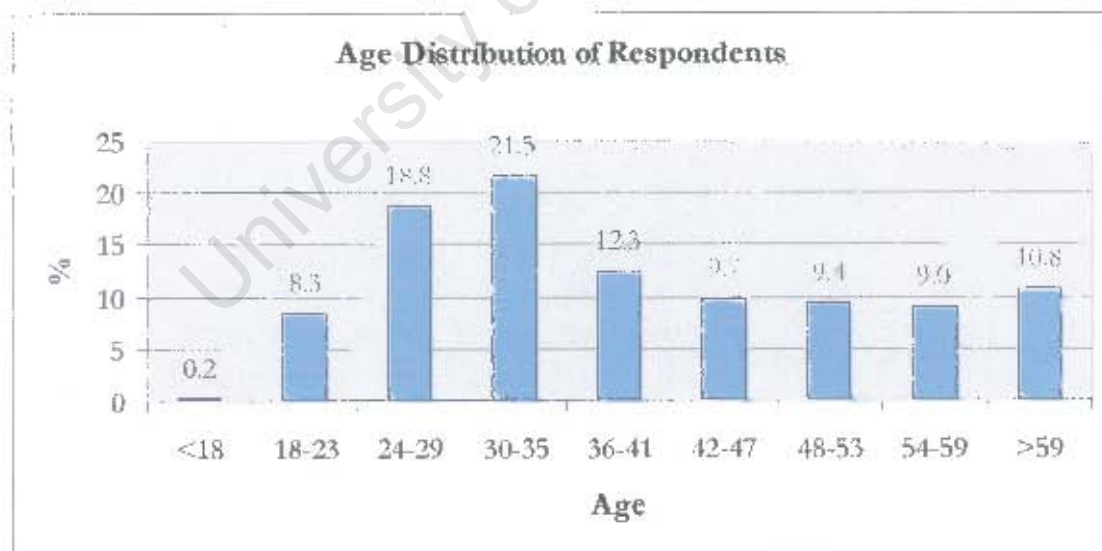


Figure 31: Age Distribution of Respondents

As with the qualitative research that showed 51.8% of respondents were from the UK, this survey also polled a significant number of UK respondents (44.3%). This can be attributed to the intensive marketing campaign by SA Tourism that was carried out recently in this particular target market. The campaign seems to have been successful in attracting more UK tourists to Cape Town given that the CMT international visitor research for 2001 showed that only 28.3% of visitors were from UK compared to 44.3% for this survey. A significant decrease in the number of American respondents that visited the destination can be noted. The qualitative research polled 16.5% of Americans in contrast to 5.5% for this survey. This can be attributed largely to the September 11 terrorist attacks on the US that has significantly affected the number arrivals from that destination. Findings from CMT international visitor research for 2001 showed that 24.3% of visitors surveyed were from Germany, Netherlands (6%) and 10.8% from other countries. This study supports these findings given that visitors surveyed were from Germany (20.2%) and Netherlands (9.4%) as shown in **Figure 32**. It can be said that most international visitors to Cape Town are from European countries but the diversity of visitors from other countries (12%) cannot be ignored.

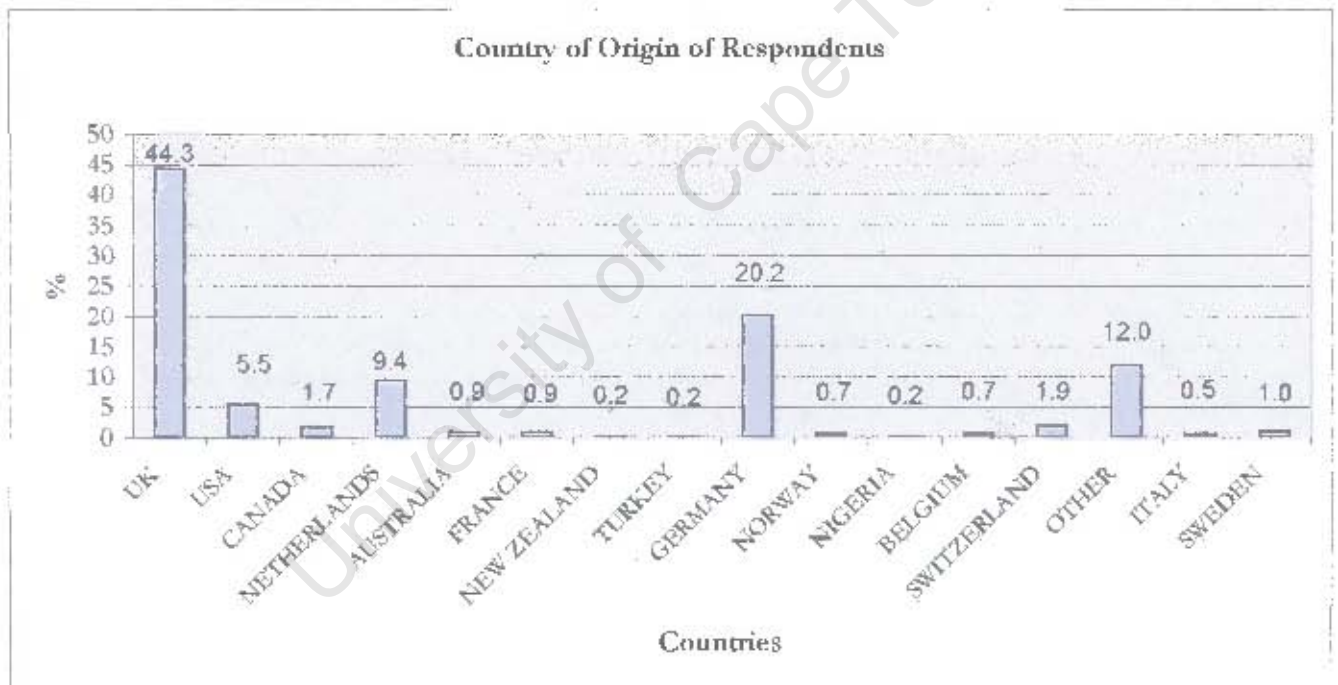


Figure 32: Country of Origin of Respondents

Finally respondents were asked about their monthly income in US \$. Respondents in general had a monthly income of approximately between \$3500-6499 as shown in **Figure 33**. These figures must be interpreted as estimates only as they are subject to under and over estimation. Also 40% of the sample refused to disclose

their income and this makes it difficult to interpret anything meaningful from such estimates. This confirms Baloglu and McCleary (1999) view that surveying tourists is very difficult particularly when personal questions such as income have to be answered by the respondents.

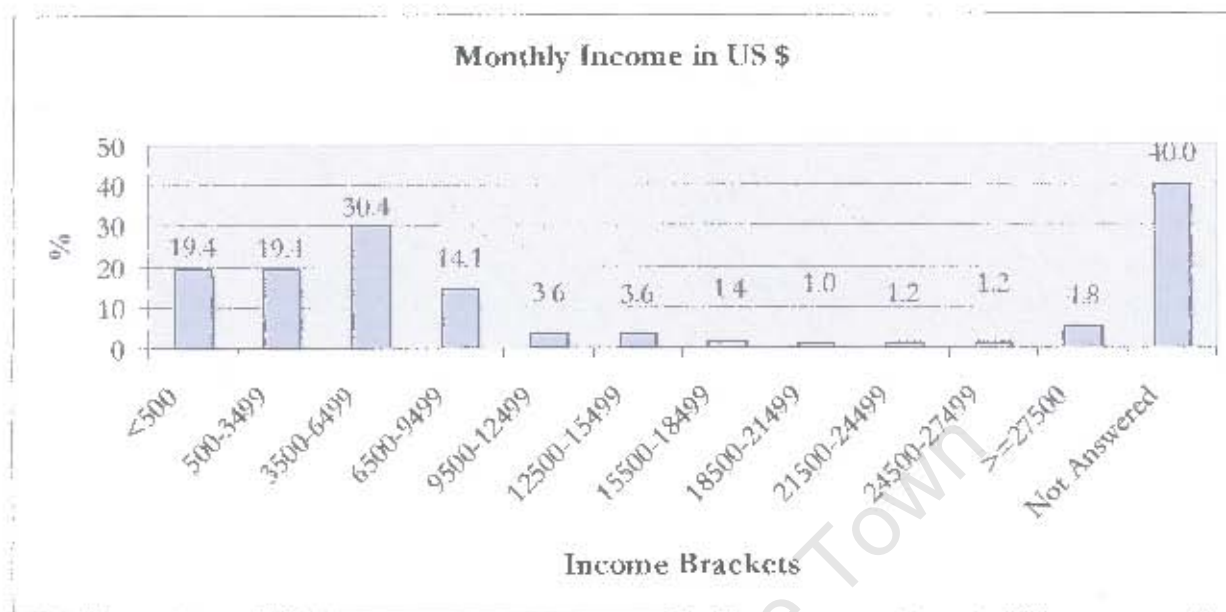


Figure 33: Monthly Income of Respondents

## 5.2 TRAVELLING CHARACTERISTICS OF THE SAMPLE

Regarding the travelling characteristics of respondents, 77.1% stated holiday as their main purpose of visiting Cape Town while 8.5% were visiting friends and relatives and 7.5% were on a business trip (Figure 34). This is not surprising given that the survey was conducted primarily at leisure attractions. However, in comparison to the qualitative research findings, which showed that nearly 95% of respondents were either on holidays or VFR, there are fewer respondents visiting family and friends (8.5%) for this survey. This can be attributed to seasonality. The summer season attracts more tourists that visit for a much wider variety of reasons than the winter season.

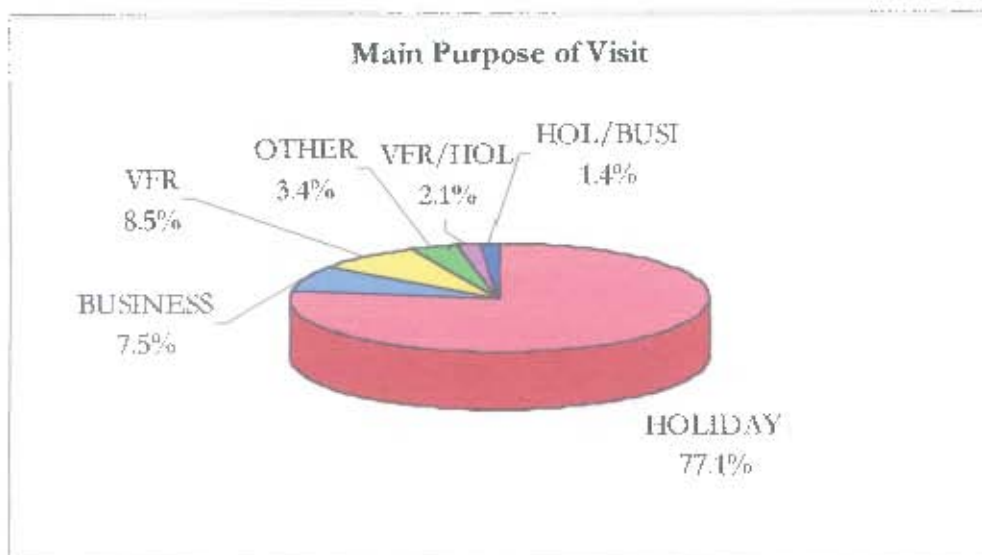


Figure 34: Main Purpose of Visit

The average length of stay in Cape Town was 10.9 days compared to 16.9 days for South Africa. A significant number of respondents (38.3%) stayed in Cape Town between 6 and 10 days as shown in **Table 4**.

NO. OF DAYS	COUNT	%
1-5 DAYS	105	18.2
6-10 DAYS	221	38.3
11-15 DAYS	135	23.4
16-20 DAYS	12	2.1
21-25 DAYS	45	7.8
26-30 DAYS	13	2.3
>30 DAYS	46	8.0
Not Answered	8	1.4
<b>TOTAL</b>	<b>585</b>	<b>100</b>

Table 4: Number of Days Respondents Stayed in Cape Town

Similarly, a significant number of international visitors (27.8%) stayed in South Africa between 11 and 15 days as shown in **Table 5**. The CMT international visitor research for 2001 showed that the average length of stay in Cape Town was 9.1 days compared to 17 days in South Africa. This survey shows a slight increase in the number of days that international visitors spend in Cape Town.

NO. OF DAYS	COUNT	%
1-5 DAYS	13	2.2
6-10 DAYS	101	17.4
11-15 DAYS	161	27.8
16-20 DAYS	63	10.9
21-25 DAYS	115	19.8
26-30 DAYS	49	8.4
>30 DAYS	78	13.4
Not Answered	5	0.9
<b>TOTAL</b>	<b>585</b>	<b>100</b>

**Table 5:** Number of Days Respondents Stayed in South Africa

It is interesting to note that **65.5% of respondents** were on their **first visit** to Cape Town. Of the 34.5% that were repeat visitors, **45.5%** were on their **second visit**, **20.5%** on their **third visit**, **7.2%** on their **fourth** visit, **8.8%** on their **fifth visit** while the rest had visited Cape Town more than five times before. In contrast, the CMT international visitor research for 2001 reported a slightly higher number (71.7%) of first time visitors to Cape Town. This study tends to confirm that the destination offers a product that is conducive to repeat visits as shown by a lower percentage of first time visitors. International visitors to Cape Town usually travel with family and friends mostly.

As can be seen in **Table 6**, **32.8%** of respondents usually travel with friends while **28%** travel with their family. Only **5.8%** of respondents travel as part of an organised tour. This seems to suggest that most respondents do not rely on tour operators to plan their holidays and thus other sources of information are critical in creating the right expectations. On the other hand, the qualitative research findings showed that **40%** of respondents travel with friends when on holidays and **28.2%** travel alone. It must be noted that age of respondents determine to a large extent who they travel with. The younger sample for the qualitative research compared to this survey accounts for the significantly different figures for travelling patterns.

TRAVEL	% OF RESPONDENTS	% OF RESPONSES
Family	28.0	20.7
Friends	32.8	24.2
Wife	8.4	6.2
Husband	11.5	8.5
Organised Tour	5.8	4.3
Girlfriend	4.3	3.2
Boyfriend	6.3	4.7
Partner	14.9	11.0
Alone	20.2	14.9
Business	2.4	1.8
Other	0.9	0.6
Valid N	585	792

Table 6: Respondents Travel Characteristics

### 5.3 FACTORS THAT INFLUENCE DESTINATION CHOICE

In order to prove or disprove the main hypothesis, all secondary hypotheses have to be proved or disproved first. This section will begin with relevant analyses to prove or disprove the secondary hypotheses.

#### Secondary Hypotheses:

- H<sub>1</sub>:** Good climate/weather is **not** considered to be an important factor influencing destination choice.
- H<sub>2</sub>:** Value for money is **not** an important consideration influencing destination choice.
- H<sub>3</sub>:** Scenic beauty is **not** an important consideration influencing destination choice.
- H<sub>4</sub>:** Personal safety is **not** considered to be an important factor influencing destination choice.
- H<sub>5</sub>:** Culture is **not** an important factor influencing destination choice.

The qualitative research showed that climate/weather (32.9%) and value for money (25.9%) were the most important factors to international visitors when choosing a destination. The quantitative study confirms that good climate is critical since 46% of respondents rated it as being very important. Similarly, value for money is an important (51.2%) consideration when choosing a destination. However, the most important factor when choosing a destination is beautiful scenery and natural attractions with a mean of 1.65. Personal safety

is another very important factor as mentioned by 46.3% of respondents. Culture is also of importance since 52.1% of international visitors rated this factor as important while 24.7% rated it as very important. In addition, **Table 7** below shows factors such as 'interesting and friendly people' and 'unpolluted and unspoiled environment' are considered very important in influencing destination choice with a mean value of 1.91 and 1.86 respectively. Thus all the stated null hypotheses above are rejected.

Similar studies on destination image showed that scenery and climate were the most important attributes defining the attractiveness of a destination while culture was among attributes with the least importance (Hu and Richie, 1993: 29). Andreu, Bigne and Cooper (2000: 58) found that the choice of a holiday destination was significantly influenced by the following factors that were rated as very important (value for money – 61%, natural beauty – 59.2%, safety – 38.1% and culture – 27.7%). In the same light, Vaughan and Edwards (1999: 363) found that weather was a very important factor in the choice of Algarve and Cyprus as holiday destinations. Therefore, this study confirms that weather, value for money, scenic beauty and safety are important factors that influence the choice of a holiday destination.

All other factors in **Table 7** are considered as being important when choosing a destination with the exception of 'English speaking country – mean value of 3.31' and 'Good nightlife and entertainment – mean value of 3.05' that were rated as being neutral. However, it must be realised that the sample consists of more older respondents than younger ones on average. The results might have been otherwise for factor 'Good nightlife and entertainment' had the sample on average been younger.

FACTORS	VERY IMPORTANT %	IMPORTANT %	NEUTRAL %	NOT IMPORTANT %	NOT AT ALL IMPORTANT %	MEAN	VALID N
Never been to destination before	20.32	39.58	19.61	15.41	5.08	2.45	571
Value for money	23.43	<b>51.22</b>	18.53	6.12	0.70	2.09	572
Destination image	15.41	43.96	21.02	14.89	4.73	2.49	571
Beautiful scenery and natural attractions	43.88	47.55	7.52	1.05	0.00	<b>1.65</b>	572
Good climate	45.98	38.99	10.49	4.02	0.52	<b>1.74</b>	572
Interesting cultural and historical attractions	24.65	<b>52.10</b>	18.53	4.20	0.52	2.04	572
Suitable accommodations	23.60	48.25	20.98	5.94	1.22	2.13	572
Plenty of information available on the destination	19.93	45.80	26.22	7.34	0.70	2.23	572
Great beaches and water sports	18.91	34.50	25.74	17.86	2.98	2.51	571
Quality transport and infrastructure	13.81	44.76	29.20	11.54	0.70	2.41	572
Personal Safety	46.33	43.01	8.39	1.75	0.52	<b>1.67</b>	572
English speaking country	4.90	18.88	29.37	36.01	10.84	3.31	572
Good nightlife and entertainment	7.87	22.03	35.14	27.10	7.87	3.05	572
Interesting and friendly people	23.60	<b>64.16</b>	9.97	1.92	0.35	<b>1.91</b>	572
Good service	18.18	<b>57.69</b>	20.63	3.32	0.17	2.09	572
Plenty of activities to do	13.81	<b>52.97</b>	24.48	7.87	0.87	2.29	572
Appealing local cuisine	21.50	47.55	21.85	8.04	1.05	2.19	572
Good shopping facilities	16.78	26.05	27.27	21.85	8.04	2.78	572
Easily accessible	9.27	42.48	27.10	16.96	4.20	2.64	572
Unpolluted and unspoiled environment	30.18	<b>55.61</b>	11.93	1.93	0.35	<b>1.86</b>	570

**Table 7: Importance Ratings of Factors Influencing Destination Choice**

### **Secondary Hypothesis**

**H<sub>6</sub>:** Destination image is the single most important factor influencing destination choice.

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Based on the findings in **Table 7**, destination image is considered important when choosing a destination, as its mean importance rating value is 2.49. The qualitative research indeed showed that this factor influenced destination choice given that 56.5% of respondents mentioned that it was either important or very important. Destination image was particularly important to respondents from UK, Germany and Netherlands when choosing a destination ( $p= 0.0045$ ). In fact 44.1% of British, 40.4% of Germans and 50% of respondents from Netherlands rated this factor as being important. It is interesting to note that there was no significant relationship between mean importance rating of destination image and age of respondents. The qualitative research seemed to suggest a relationship between these two variables where younger respondents attached less importance to this factor because they wanted to experience the destination for themselves as opposed to relying on its image to form an opinion of it. Nevertheless such a relationship cannot be ignored because the sample for the quantitative survey is much older on average than the one for the qualitative research.

Consequently, the null hypothesis that destination image is the single most important factor influencing destination choice is rejected at the 5% level of significance. It must be realised that it is difficult for respondents to think of destination image in a holistic way. Most probably their interpretation of destination image is limited to visual images, which leads to the above conclusion. Nevertheless destination image is a critical component in destination selection (Baloglu, 1997; Hu and Ritchie, 1993). Scenic beauty and natural attractions are the most important factors given their lowest mean importance score of 1.65. This is in line with other research (Baloglu and McCleary, 1999; Murphy, 1999, Chen and Hsu, 2000) on destination image that also showed scenic beauty as being among the most important factors influencing destination choice.

### **Secondary Hypotheses**

- H<sub>7</sub>:** There are **no** significant differences in mean importance rating of factors influencing destination choice based on international tourists' demographic characteristics.
- H<sub>8</sub>:** There are **no** significant differences in mean importance rating of factors influencing destination choice based on international tourists' travelling characteristics.
- 

No significant relationship could be established between either age or gender of respondents, and the mean importance rating for good climate and weather. This is because most respondents considered this factor to be either important or very important in choosing a destination. Similarly there were no significant differences in mean importance rating of good climate and weather based on tourists travelling characteristics. However, the age of respondents influenced how value for money was rated. Analysis of variance revealed that the mean importance rating of value for money was significantly different ( $p=0.01029$ ) to those of other attributes. Yet, post-hoc comparison of means using Scheffes method of multiple comparisons revealed no significant differences. Nevertheless, analysis of variance revealed that there was a significant difference ( $p= 0.001394$ ) in mean rating of this variable with respect to first time visit or not at a 5% level of significance. Scheffes post hoc comparison revealed that first-time visitors attached more importance to value for money than repeat visitors. Of course respondents who were on holidays in Cape Town attached more importance to value for money as opposed to those visitors that were on a business trip or visiting family and friends ( $p =0.044$ ). This is largely due to the sample having predominantly respondents that were on holidays in Cape Town. Also, it is interesting to note that 52.2% of respondents who rated value for money as being very important were from UK while 34.3% of those that rated the factor as being not important were from Germany. This tends to suggest that despite the pound being strong on financial markets, British visitors are still concerned about value for money.

No significant differences in mean importance rating of scenic beauty with respect to either demographic or travelling characteristics could be established at a 5% level of significance. However, analysis of variance on personal safety revealed the existence of a significant difference ( $p=0.007856$ ) in mean importance rating with respect to gender. Scheffes method revealed that females attached more importance to personal safety than males when choosing a destination. This is not surprising, as there is empirical evidence (George, 2003) that women possess higher levels of fear when travelling in Cape Town. Age and travelling characteristics had no impact on how personal safety was rated. The only significant difference ( $p=0.019648$ ) in mean

rating of interesting cultural attractions was attributed to first time visit or not. First-time visitors attached more importance to a destination having interesting cultural and historical attractions as opposed to repeat visitors. Further analysis of significant differences in mean importance rating of destination choice attributes with respect to demographic and travelling characteristics revealed the following:

Demographic /travelling characteristics	Destination Choice Attributes	Significant Differences	Explanation of difference in mean importance rating
Gender	Good nightlife and entertainment	0.013262	Males attached more importance to good nightlife and entertainment than females.
Gender	Good shopping facilities	0.00153	Females attached more importance to good shopping facilities than males
Age	Information availability on the destination	0.016705	Older respondents attached more importance to availability of information than youngsters.
Age	Great beaches and water sports	0.002659	Young respondents attached more importance to a destination offering great beaches and watersports as opposed to older respondents.
Age	Good nightlife	0.000019	Young respondents attached more importance to a destination having good nightlife and entertainment as opposed to older respondents.
Age	Good service	0.014293	Older respondents attached more importance to good service than younger respondents.
Age	Plenty of activities to do	0.030953	Young respondents attached more importance to a destination offering plenty of activities to do as opposed to older respondents.
Country of origin	Accommodation	0.04966	British tourists attached more importance to suitable accommodations in their choice of a destination than German tourists.
First-time visit	Information availability on the destination	0.026705	First-time visitors attached more importance to availability of information on a destination than repeat visitors.
First-time visit	Friendly people	0.027358	Repeat visitors attached more importance to a destination having interesting and friendly people than first-time visitors.
First-time visit	Plenty of activities to do	0.014111	First-time visitors attached more importance to a destination offering plenty of activities to do than repeat visitors.
First-time visit	Local cuisine	0.019486	First-time visitors attached more importance to a destination offering an appealing local cuisine than repeat visitors.
First-time visit	Good shopping facilities	0.033852	Repeat visitors attached more importance to a destination offering good shopping facilities than first-time visitors.

**Table 8: Significant Differences in Mean Importance Rating of Attributes**

Based on the above analyses, it can be concluded that demographic characteristics do have some influence on ratings of attributes based on importance in the destination choice process. The same applies to travelling characteristics. Consequently both null hypotheses are rejected at a 5% level of significance.

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**Main Hypothesis:** There is more than one factor that influences destination choice.

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Except for attributes 'English speaking country' and 'good nightlife and entertainment' in **Table 7** that were rated as neutral on average, all other attributes were rated either as very important or important. Beautiful scenery received the highest mean importance rating followed by personal safety, good climate, unpolluted and unspoiled environment, and interesting and friendly people. All secondary hypotheses were rejected. Demographic and travelling characteristics of respondents do influence the mean importance rating of factors that influence the choice of a destination. Age, gender, first-time visit or repeat visits, and country of origin have a significant influence on the choice process to some extent. Consequently, the null hypothesis of the existence of more than one factor that influences destination choice is accepted.

## 5.4 FACTORS AND SOURCES OF INFORMATION THAT MOST INFLUENCED THE CHOICE OF CAPE TOWN

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### **Secondary Hypotheses:**

- H<sub>9</sub>:** Word-of-mouth is **not** the most influential source of information on Cape Town.
- H<sub>10</sub>:** There are **no** significant differences in international tourists' perceptions of the most influential sources of information based on demographic characteristics.
- H<sub>11</sub>:** There are **no** significant differences in international tourists' perceptions of the most influential sources of information based on travelling characteristics.
- 

The qualitative research showed that 38.8% of respondents relied on word-of-mouth to plan their holiday. Most respondents (61%) heard about Cape Town from family and friends while the same sources also recommended the destination. Respondents from this survey were asked to **rank** their four most influential

sources of information in terms of how strongly they influenced their decision to visit Cape Town. As can be seen in **Table 9**, word-of-mouth was the most influential source of information about the destination with 45% of respondents ranking it on average as first. There were two second most influential source of information namely travel guidebooks and the Internet. The third most influential was travel guidebooks followed by brochures/pamphlets in the fourth place.

SOURCE	% OF RESPONDENTS	% OF RESPONDENTS RANK 1 ON AVERAGE	% RESPONDENTS RANK 2 ON AVERAGE	% RESPONDENTS RANK 3 ON AVERAGE	% RESPONDENTS RANK 4 ON AVERAGE
Travel Agent	25.81	6.8	4.6	5.5	8.9
Tour Operator	8.38	1.2	4.6	0.9	1.7
Word-of-Mouth	<b>74.70</b>	<b>45</b>	14	9.6	6.2
Internet	55.21	14.2	<b>23.2</b>	9.4	8.4
Travel Guide Books	64.10	10.4	<b>24.6</b>	<b>23.2</b>	5.8
Brochures/Pamphlets	25.64	1.5	4.3	9.6	<b>10.3</b>
Advertising/Promotion	11.11	0.3	2.2	4.3	4.3
Previous Visit to Cape Town	28.38	12.3	7.4	6.3	2.4
Information Centres	13.50	1.4	1.2	5.5	5.5
Work	2.91	1.9	0.5	0.3	0.2
Other	5.13	1.9	1	1	1.2

**Table 9:** Most Influential Sources of Information

Thus the power of word-of-mouth should not be underestimated. Respondents tend to seek advice from family and friends when they are unsure of what to expect from the destination. In fact, 14.7% of respondents mentioned this factor as one that had a significant influence on their decision to choose Cape Town as a holiday base. Murphy (1999) reached a similar conclusion in her study on Australia’s image as a holiday destination. She found that 89.5% of the 305 respondents surveyed indicated that the most important source of information was people who had travelled to the destination before. Travel guidebooks was used by 70.6% of her respondents while 67% used their own previous visits as a source of information. Therefore both positive and negative word-of-mouth disseminated by family and friends are likely to have the most influence on destination choice. Particularly negative comments are more likely to stick in the potential visitor’s mind than information received from any other sources.

Respondents were further asked whether there is enough information available on the destination in their home country. Of respondents, 51.9% agreed that there was sufficient information. Consequently, the null hypothesis that word-of-mouth is not the most influential source of information is rejected. Gender has a significant influence ( $p= 0.032611$ ) on how international tourists ranked their most influential sources of information on average. Scheffes post-hoc comparison of means revealed that males on average are most influenced by word-of-mouth and Internet. Females are most influenced by travel guidebooks and information centres. This leads to the rejection of the null hypothesis for hypothesis ten. Also, one travelling characteristic namely whether the tourist was a first-time or repeat visitor had a significant influence ( $p= 0.000$ ) on how they ranked sources of information on average. Of course repeat visitors were mostly influenced by their previous visit. Obviously travel agents, word-of-mouth, Internet and travel guidebooks were most influential on average to first-time visitors than repeat visitors. Consequently the null hypothesis for hypothesis eleven is rejected at a 5% level of significance.

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**Main Hypothesis:** Word-of-mouth has the most influence on the choice of Cape Town as a destination.

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It has already been proved that word-of-mouth is the most influential source of information influencing the choice of Cape Town as a destination. The qualitative research showed that word-of-mouth comes mostly from family and friends. Yet the final choice is usually influenced by a combination of factors such as word-of-mouth, attractions, accessibility, climate and so on. Respondents were asked to mention the four main factors that influenced their choice of Cape Town as a destination. The first word mentioned is usually the one that influenced visitors the most. In this case, visiting family and friends was the most common response (19.3%) for factor one, weather/climate was the most common response for factor two (22.2%) and three (15.5%), and scenery (15.3%) for factor four. **Table 10** shows that 38.3% of respondents chose Cape Town because it offers a consistently good climate/weather, which reinforces previous findings, that climate/weather is an important factor when choosing a destination. Visiting family and friends (26.8%) influences this choice to a large extent. Scenery (18.1%), value for money (18.3%) and word-of-mouth (14.7%) do affect to some extent the choice of Cape Town as a destination. Other interesting factors include past visits to the destination (8.9%), which indicates to some extent the loyalty of respondents

towards the destination. The fact that 14.2% of respondents chose Cape Town on the basis of it being a 'new' destination seem to suggest that once the novelty factor is gone, repeat visits might decrease.

<b>FACTORS</b>	<b>% OF RESPONSES (1275)</b>	<b>% OF RESPONDENTS (585)</b>
Previous Visit	4.08	8.89
Beach	2.12	4.62
Attractions in Cape Town	4.71	10.26
Local Cuisine	1.57	3.42
<b>VFR</b>	<b>12.31</b>	<b>26.84</b>
<b>Weather/Climate</b>	<b>17.57</b>	<b>38.29</b>
Interest/Like Cape Town	4.39	9.57
Work/Business Purposes	4.86	10.60
Holiday	5.10	11.11
Value for Money	<b>8.39</b>	<b>18.29</b>
New Destination	6.51	14.19
Its Location	0.71	1.54
<b>Scenery</b>	<b>8.31</b>	<b>18.12</b>
Easy Accessibility	1.49	3.25
Variety of Activities	3.29	7.18
Culture/Friendliness	3.53	7.69
Gateway to Other Places	0.71	1.54
<b>Word-of-mouth</b>	<b>6.75</b>	<b>14.70</b>
History of Country	1.65	3.59
Part of a Tour Group	0.94	2.05
Safari/Wildlife	0.71	1.54
Political Stability	0.24	0.51
Shopping	0.08	0.17
<b>TOTAL</b>	<b>100</b>	

**Table 10:** Main Factors Influencing Choice of Cape Town as a Destination

Respondents that were mostly influenced by attractions, weather, interest in Cape Town, holiday, word-of-mouth and scenery were first-time visitors. Previous visits and value for money mostly influenced repeat visitors. Of course all respondents that were influenced by Cape Town being a 'new' destination were first-time visitors. Therefore word-of-mouth is not the factor with the most influence on destination choice though it is the most influential source of information for potential visitors. Consequently the null hypothesis above is rejected. Visiting family and friends, good climate, scenery as well as word-of-mouth significantly influenced the choice of Cape Town as a holiday destination.

## 5.5 INTERNATIONAL TOURISTS' EXPECTATIONS

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### Secondary Hypotheses:

- H<sub>12</sub>:** International tourists do **not** expect a city that is developed.
- H<sub>13</sub>:** International tourists do **not** expect a city that offers a unique experience.
- H<sub>14</sub>:** International tourists do **not** expect to see crime.
- H<sub>15</sub>:** International tourists do **not** expect to see poverty.
- 

A likert scale was used to measure what international visitors expect from Cape Town prior to their visit. They were asked to rate statements that pertained to some of the qualitative research findings using an agreement/disagreement scale. Ten out of nineteen statements provide information on visitors' expectations and are highlighted in grey in **Table 11**. Of respondents, 52.4% knew what to expect prior to their visit to Cape Town. Their expectations are that the city is modern and developed as shown by the high level of disagreement (64.3%) with the statement 'I expected Cape Town to be more wild and underdeveloped'. They expect Cape Town to offer a unique experience in terms of variety of things to see and do as shown by the high level of agreement (58%) with statement four in **Table 11**. Indeed tourists are warned about crime before their visit to Cape Town (strongly agree – 27.5% and agree – 44.8%) that confirms similar findings from the qualitative research. Furthermore, international visitors expect to see poverty as shown by the high level of disagreement (41.6%) with statement eleven. They also expect their trip to be informative and a unique cultural experience (agree – 57.1%). Of respondents, 28.4% were expecting a third world country but found first world facilities and amenities.

Analysis of variance revealed a significant difference ( $p= 0.000514$ ) in mean level of agreement with statement one based on whether international tourists were visiting for their first-time or not. First-time visitors disagreed more with that statement than repeat visitors. A significant difference ( $p= 0.000049$ ) was also found between statement ten and first-time visit or not. First-time visitors agreed more to the statement than repeat visitors. Similarly first-time visitors agreed more to statement twelve than repeat visitors did ( $p= 0.043739$ ). Factor analysis revealed the existence of only two factors. The first factor was made up of two statements – I expected Cape Town to be wild and underdeveloped, and I was expecting a 3<sup>rd</sup> world country but found 1<sup>st</sup> world facilities and amenities. Factor loading for each statement was 0.7625 and 0.7413

respectively. Therefore this factor can be named as 'degree of westernisation of Cape Town.' This factor explained 8.7% of variance in the data set. The second factor will be dealt with at a later stage.

STATEMENTS	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	MEAN	VALID N
1. Cape Town is very much what I expected it would be.	19.18	52.10	12.50	15.07	0.86	2.26	584
2. The crime situation is not as bad as I thought it would be.	7.97	51.13	27.73	11.79	1.39	2.47	577
3. I was surprised by the friendliness of the local people.	20.00	44.10	18.63	16.41	0.85	2.31	585
4. I expected the city to offer a unique experience in terms of the variety of things to see and do.	18.75	57.99	16.67	6.60	0.00	2.11	576
5. The city is much more beautiful than I expected.	22.55	42.51	21.69	12.39	0.86	2.27	581
6. I was warned in my home country about the crime situation in Cape Town.	27.52	44.79	10.60	15.56	1.54	2.19	585
7. Cape Town is very westernized and has a European 'feel'.	16.52	61.89	8.26	9.81	0.52	2.13	581
8. There was sufficient information available on the destination in my home country.	16.27	51.88	11.13	17.64	3.08	2.39	584
9. Table Mountain symbolizes what Cape Town has to offer.	15.27	38.08	18.18	25.56	2.92	2.63	583
10. I expected Cape Town to be more wild and underdeveloped.	1.55	17.24	12.07	64.31	4.85	3.51	580
11. I did not expect such high poverty levels in Cape Town.	2.96	27.13	25.74	41.57	2.61	3.14	575
12. I expected the trip to be informative and a unique cultural experience.	11.46	57.12	20.83	9.72	0.87	2.31	576
13. Cape Town has a distinct image in my mind.	21.61	62.61	11.32	3.77	0.69	1.99	583
14. Cape Town offers very little of an 'African' experience.	5.88	46.02	23.70	22.49	1.90	2.69	578
15. I was expecting a 3rd world country but found 1st world facilities and amenities.	4.85	28.12	18.02	43.15	5.55	3.16	577
16. Cape Town is not marketed properly in my home country.	11.63	38.02	14.93	32.64	2.78	2.77	576
17. Cape Town is very different from the rest of South Africa.	12.39	41.07	39.65	3.89	0.00	2.35	565
18. The atmosphere is more laid back than I expected.	5.17	53.45	23.28	17.41	0.69	2.55	580
19. I will say positive things about the destination to friends/relatives/colleagues.	59.11	38.32	1.89	0.34	0.34	1.45	582

Table 11: Respondents' Ratings of Expectation and Perception Statements

Furthermore, analysis of variance showed a significant difference between gender and statement one. Females on average tend to disagree more than males on that statement. This is perhaps because males tend to use more different and multiple sources of information than females to form expectations. Based on the findings above, hypothesis twelve is rejected given that on average (3.5) respondents disagreed with statement ten. Hypothesis thirteen is also rejected given that on average (2.1) respondents agreed with statement four. Similarly, on average respondents were either neutral or disagreed with the statement that they did not expect to see high poverty levels. Consequently hypothesis fifteen is rejected. However, hypothesis fourteen is accepted given that on average (2.2) respondents agreed that they were warned about the crime situation in Cape Town. They expect to see crime.

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**Main Hypothesis:** International tourists have the wrong expectations.

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A significant number (15.7%) of visitors were unaware of what to expect given that they disagreed with statement one. International visitors do not always have the right expectations as shown by 17.2% of them expecting the city to be wild and underdeveloped, 44.1% being surprised by friendliness of locals, 42.5% finding the city more beautiful than expected, 53.5% finding the atmosphere more laid-back than expected. Therefore future marketing campaigns should aim at creating the right expectations especially with regards to destination attributes such as scenic beauty and friendliness of locals that are considered important in the choice of a destination. Cluster analysis was performed on all nineteen statements to identify any particular groupings of statements or respondents based on level of agreement or disagreement. There were no significant findings when statements were clustered.

However, three distinct clusters emerged as shown in **Figure 35** when respondents were clustered using the K-means method. Cluster one contained 174 respondents while cluster two and three contained 270 and 141 respondents respectively. Respondents from cluster one and two agreed to statement one while respondents from cluster three were more neutral than agreeing. Respondents from cluster one and two agreed to statement eight compared to respondents from cluster three that were either neutral or disagreed to the statement. Respondents from cluster two and three were neutral to statement nine while respondents from cluster one agreed to strongly agreed. Statement fifteen provides some indication on how expectations

differ among respondents and are not in line with reality. Cluster one agreed that they were expecting a third world country but found first world facilities and amenities. Respondents from cluster two and three were either neutral or disagreed. Similarly respondents from cluster one and three agreed to statement seventeen while respondents from cluster two were neutral.

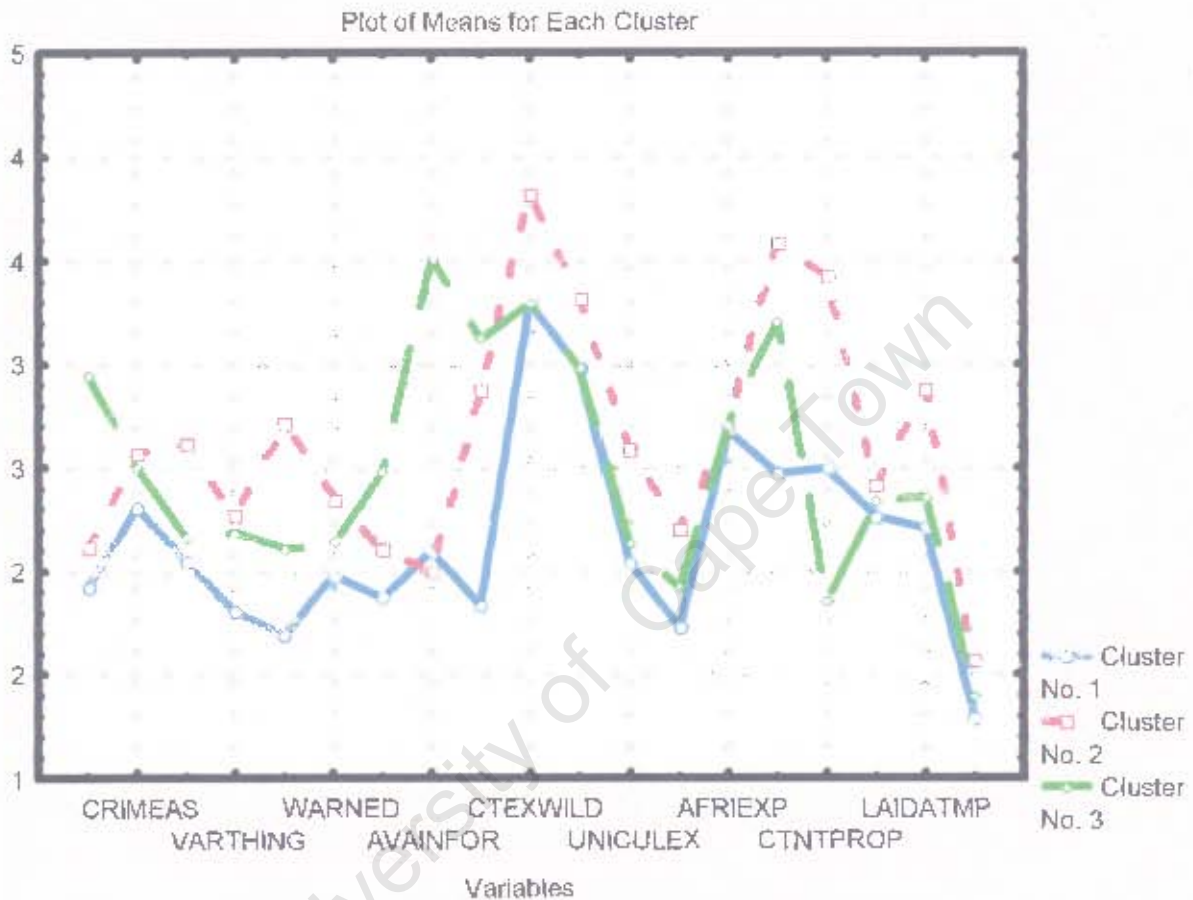


Figure 35: Plot of Means for each Cluster

Based on the above findings, respondents from cluster three have slightly more wrong expectations than those from cluster one and two. Consequently, the null hypothesis is accepted and it can be concluded that international visitors to Cape Town do not always have the right expectations.

## 5.6 INTERNATIONAL TOURISTS' PERCEPTIONS

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### Secondary Hypotheses:

- H<sub>16</sub>: International tourists do **not** perceive the city to be friendly.
  - H<sub>17</sub>: International tourists do **not** perceive the city to be beautiful.
  - H<sub>18</sub>: International tourists perceive the city to offer very little of an 'African' experience.
- 

Based on the findings in **Table 11**, 16.4% of respondents disagreed with the statement that they were surprised by the friendliness of locals. This means that they expected the city to be friendly. Similarly, 12.4% of respondents were not surprised that the city is beautiful. Respondents were further asked to rate Cape Town on a list of attributes that reflected some of the factors that usually influence destination choice. This helped to establish whether Cape Town is favourably rated on friendliness and scenic beauty. As can be seen from **Figure 36**, Cape Town is rated good on friendliness and excellent on scenery and natural attractions. These two attributes on average had a mean rating of 4.31 and 4.69 respectively (**Table 12**). Consequently, hypotheses sixteen and seventeen are rejected. International tourists perceive the city to be friendly and beautiful. Yet 46% of respondents agreed that Cape Town offers very little of an African experience. Findings from the Cape Metropolitan Tourism international tourist research 2001, showed that only 54.1% of respondents surveyed agreed that African culture is represented in Cape Town. Therefore, the destination is perhaps losing out on visitors that are looking for an authentic African experience. Analysis of variance on this particular statement revealed a significant difference ( $p = 0.000437$ ) with respect to first-time visit or not. First-time visitors agreed more to this statement than repeat visitors. As a result, hypothesis eighteen is accepted at a 5% level of significance.

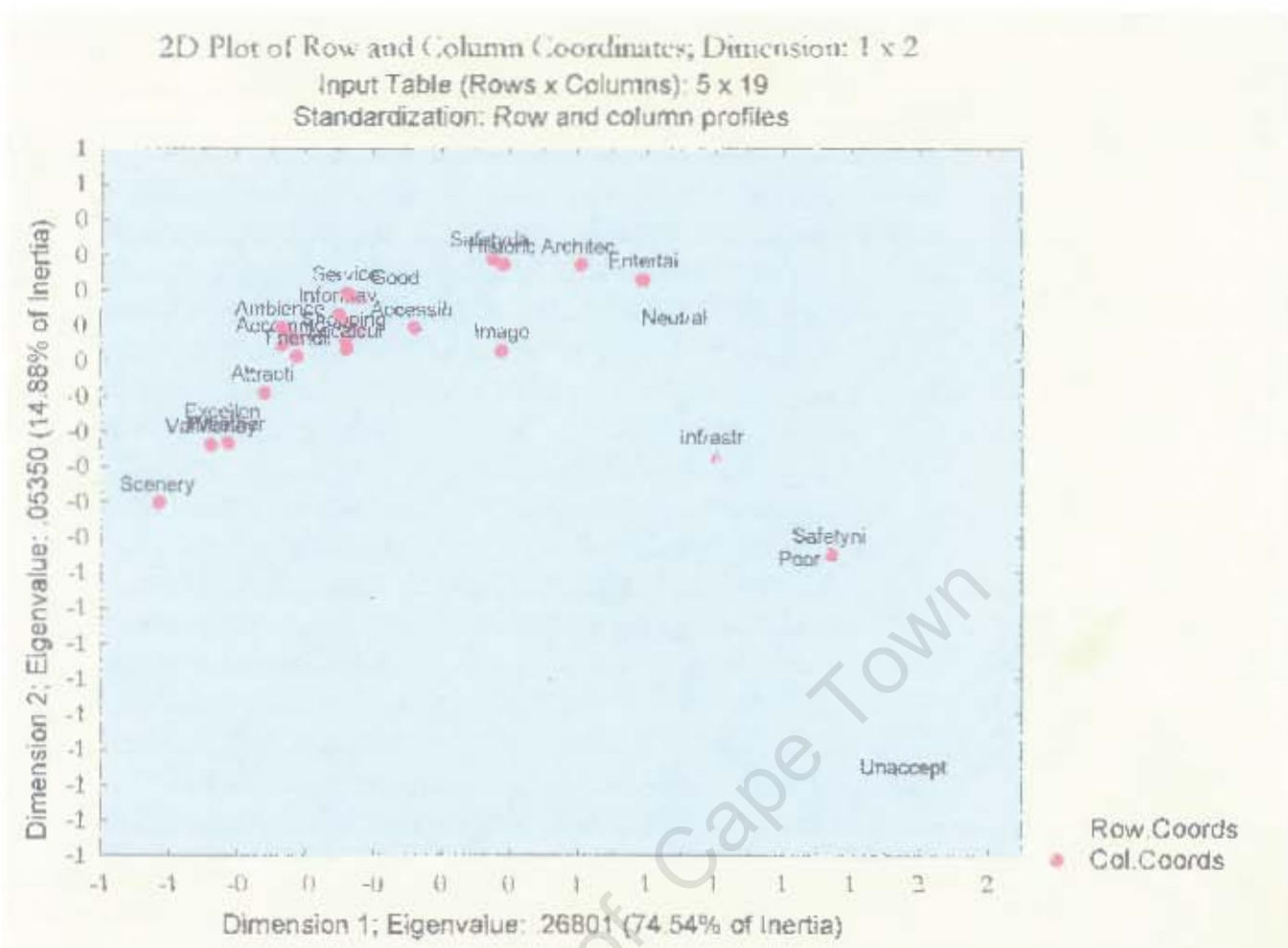


Figure 36: Perceptual Map of Attributes of Cape Town and their Ratings

**Secondary Hypotheses**

- H<sub>19</sub>: Cape Town does **not** rate favourably on safety.
- H<sub>20</sub>: Cape Town does **not** rate favourably on value for money.
- H<sub>21</sub>: Cape Town does **not** rate favourably on destination image.
- H<sub>22</sub>: Cape Town does **not** rate favourably on attractions.
- H<sub>23</sub>: Cape Town does **not** rate favourably on accessibility.
- H<sub>24</sub>: Cape Town does **not** rate favourably on infrastructure.
- H<sub>25</sub>: Cape Town does **not** rate favourably on ambience.

As a rule of thumb, no relationship can be established between attributes and ratings falling between +0.2 and -0.2 in **Figure 36**. Since dimension one explains most of the variances in the data set (74.5%), the following analysis focuses on interpretations from dimension one only. It can be seen that scenery, value for money, and weather/climate have been rated as excellent while entertainment/nightlife, safety during the day, architecture/buildings, image of destination, and infrastructure have left respondents feeling neutral. Safety at night was rated neutral on average but a significant number of respondents rated it as poor. To confirm these findings, the mean value for each of the above attributes was computed. The results are displayed in **Table 12**.

ATTRIBUTES	UNACCEPTABLE %	POOR %	NEUTRAL %	GOOD %	EXCELLENT %	MEAN	VALID N
Value for Money	0.17	0.52	3.95	35.40	<b>59.97</b>	<b>4.54</b>	582
Scenery/Natural Attractions	0.17	0.17	1.89	26.46	<b>71.31</b>	<b>4.69</b>	582
Weather/Climate	0.17	1.20	4.64	36.08	<b>57.90</b>	<b>4.50</b>	582
Accommodation/Restaurants	0.17	0.69	5.52	<b>51.90</b>	<b>41.72</b>	4.34	580
Architecture/Buildings	0.17	3.28	39.31	<b>44.66</b>	12.59	3.66	580
Infrastructure/Transport	2.97	16.58	36.82	35.43	8.20	3.29	573
Friendliness/Receptiveness of Locals	0.34	0.69	8.43	<b>48.19</b>	<b>42.34</b>	4.31	581
Entertainment/Nightlife	0.71	3.04	<b>48.93</b>	36.61	10.71	3.51	560
Safety Day	0.35	5.87	18.13	<b>63.90</b>	11.71	3.81	579
History/Cultural Attractions	0.17	2.43	29.04	<b>50.96</b>	17.39	3.83	575
Shopping Facilities	0.17	1.21	13.62	<b>47.76</b>	37.24	4.21	580
Information Availability	0.00	1.56	10.21	<b>54.33</b>	33.91	4.21	578
Safety Night	4.93	22.89	<b>42.61</b>	26.58	2.99	<b>3.00</b>	568
Service Standard	0.17	2.59	6.74	<b>62.00</b>	28.50	4.16	579
Accessibility	0.17	6.74	10.88	<b>57.51</b>	24.70	4.00	579
Image in Home Country	0.17	9.95	19.02	<b>51.48</b>	19.37	3.80	573
Local Cuisine	0.00	1.73	14.19	<b>45.67</b>	38.41	4.21	578
Ambience	0.17	0.00	5.35	<b>54.23</b>	<b>40.24</b>	4.34	579
Tourist Attractions/Beaches	0.35	0.52	6.93	<b>42.81</b>	<b>49.39</b>	4.40	577

**Table 12:** Ratings of Cape Town's Attributes

Earlier findings showed that visitors' safety influence to a large extent their choice of a destination. Respondents rated Cape Town neutral to good on average (3.81) for safety during the day while safety at night was rated from neutral to poor on average (3.00). Consequently, hypothesis nineteen is accepted. Value for money was rated on average (4.54) good to excellent, which leads to the rejection of hypothesis twenty. The image of Cape Town in respondents' home country was rated as neutral to good on average (3.80). Consequently hypothesis twenty-one can neither be accepted nor rejected. Attractions on the other hand, were rated on average good to excellent (4.69). This attribute along with scenery had the highest mean rating value. Therefore hypothesis twenty-two is rejected. This finding confirms qualitative research finding that the appeal of Cape Town is primarily based on its scenic beauty and attractions. While the qualitative research showed that accessibility was problematic during peak-season, respondents for this survey rated accessibility on average (4.00) to be good. Thus, hypothesis twenty-three is rejected. Infrastructure and transport were rated on average (3.29) neutral to poor, which leads to the acceptance of hypothesis twenty-four. However, ambience was rated on average (4.34) good to excellent, which leads to the rejection of hypothesis twenty-five.

An overall picture of Cape Town as a destination based on the above findings show that scenery, good climate/weather, value for money, and friendliness of locals were rated favourably as attributes of the destination. But more importantly though, these factors significantly influence the choice of any destination in general. The factors on which Cape Town was rated most favourably must be communicated more vigorously. There is no doubt that the destination is endowed with attributes that are sought after by international travellers but how these attributes are marketed make all the difference between why a traveller will or will not visit. It must be noted that safety is of concern to tourists especially given that they do not rate Cape Town favourably on safety at night.

Taking this analysis further, a K-Means cluster analysis was attempted to identify any particular groupings of individuals based on their perceived image of Cape Town. A threefold grouping was found to be most useful, cluster one contained 231 respondents, cluster two contained 151 respondents while cluster three was made up of 203 respondents. The only significant differences in ratings were for infrastructure and transport, safety during the day and safety at night. Cluster three is the group with the most positive perceptions on all attributes. As far as cluster two is concerned, the respondents had the most negative perceptions of infrastructure and safety. Cluster one is characterised by respondents that rated all attributes as either good or neutral. **Figure 37** shows the means for each cluster. Factor analysis on the other hand,

revealed the existence of only one construct in the data. This construct can be named 'safety' given that two attributes safety day and safety night had high factor loadings on it. Their respective factor loadings were 0.796550 and 0.814056. This construct explained 22.7% of variance in the data set.

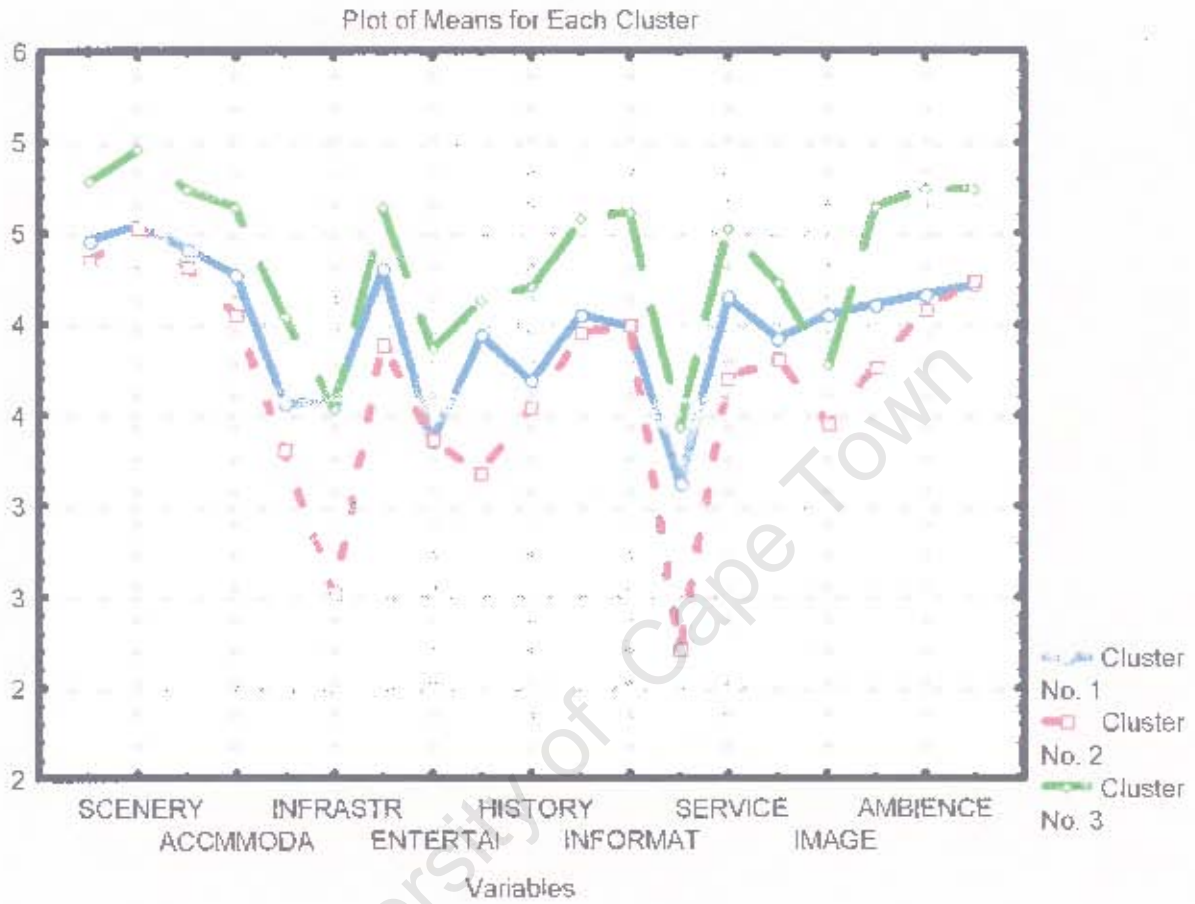


Figure 37: Plot of Means for each Cluster

### Secondary Hypotheses

- H<sub>26</sub>:** There are **no** significant differences in international tourists' mean ratings of attributes that influence the choice of Cape Town as a destination based on demographic characteristics.
- H<sub>27</sub>:** There are **no** significant differences in international tourists' mean ratings of attributes that influence the choice of Cape Town as a destination based on travelling characteristics.
- 

With hypothesis twenty-six in mind, an analysis of variance was performed on question nine in the international tourists' survey instrument using demographic variables as grouping variables and attributes as dependent variables. This analysis revealed the existence of a significant difference ( $p=0.00049$ ) in mean rating of architecture/buildings of Cape Town based on age. Post hoc comparison of means revealed a significant difference ( $p=0.0047$ ) between respondents that were older than fifty-nine years old and those that they were between that ages of thirty to thirty-five. The former rated on average this attributes as either good or excellent while the latter rated it on average as neutral. This suggests that the architecture is not appealing to younger visitors, as they perhaps do not appreciate the 'colonial' architecture of the city. Similarly, there was a significant difference ( $p=0.00182$ ) in mean rating of entertainment. Respondents between the ages of twenty-four to twenty-nine rated this attribute significantly different ( $p=0.02634$ ) from respondents that were older than fifty-nine years. The latter rated this attribute as 'neutral' on average while the former rated it as 'good' on average. This result is to be expected, as younger visitors tend to be more adventurous and take part in nightlife entertainment than older visitors. Respondents between the ages of thirty to thirty-five rated service on average significantly different ( $p=0.0285$ ) from those between the ages of eighteen to twenty-three. The former had better perceptions of service than the latter. Consequently, hypothesis twenty-six is rejected at a 5% level of significance. Age significantly influences mean ratings of attributes of Cape Town.

Travelling characteristics had the most influence on mean rating of attributes. Respondents' length of stay in Cape Town significantly influenced how they rated infrastructure ( $p=0.000219$ ), standards of service ( $p=0.0000$ ) and local cuisine ( $p=0.00015$ ). On average the longer respondents stayed in Cape Town, the poorer were their perceptions of the infrastructure, the better were their perceptions of service standards and local cuisine. The longer respondents stayed in South Africa, the better were their perceptions of service standards and local cuisine. Country of origin had a significant influence ( $p=0.0000$ ) on perceptions of value for money. Respondents from UK, Netherlands, and Germany have better perceptions of value for

money of Cape Town than respondents from any other countries. Respondents classified as 'from other countries' had on average more unfavourable perceptions of friendliness of locals than respondents from the UK. First time visitors on average had a poorer perception of accessibility than repeat visitors did. Consequently, hypothesis twenty-seven is rejected at the 5% level of significance. Travelling characteristics of respondents do have some significant influence on their ratings of attributes of Cape Town.

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**Main Hypothesis:** International tourists have better perceptions than expectations.

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Qualitative research findings showed that international visitors do not always have the right expectations. Findings from **Table 11** show that a significant number of respondents (17.2%) expect the city to be wild and underdeveloped, 44.1% are surprised by friendliness of local people, and 42.5% are surprised by scenic beauty. On the other hand, 51.1% of respondents agreed that the crime situation is not as bad as they thought it would be. The 'cosmopolitan' nature of the city cannot be denied with 64.9% of visitors agreeing that Cape Town is westernised and 46% agreeing that it offers very little of an African experience. The Cape Metropolitan Tourism visitor research results for 2001 showed similar findings with 81.3% of international visitors agreeing that Cape Town is a cosmopolitan city but only 50.9% agreeing that Cape Town is another European city. Adding to this, **Table 12** shows that 18 out of the 19 attributes defining Cape Town as a destination, were rated positively with the exception of safety at night. Value for money, scenery/natural attractions, and weather and climate were rated as 'excellent'. Cluster analysis performed on the data using the joining tree method (**Figure 38**) showed two distinct clusters of attributes if the cut-off point is set at 21.5. Cluster analysis groups attributes that were rated similarly under one cluster and try to achieve heterogeneity of clusters but homogeneity of attributes within one cluster. The attributes making up the first cluster are value for money, scenery, accommodation, ambience, beaches, friendliness of locals, service standard, weather/climate, local cuisine, information availability on the destination and shopping. These represent a combination of both tangible and intangible elements of a destination. The second cluster is made up of attributes architecture/buildings and historical/cultural attractions.

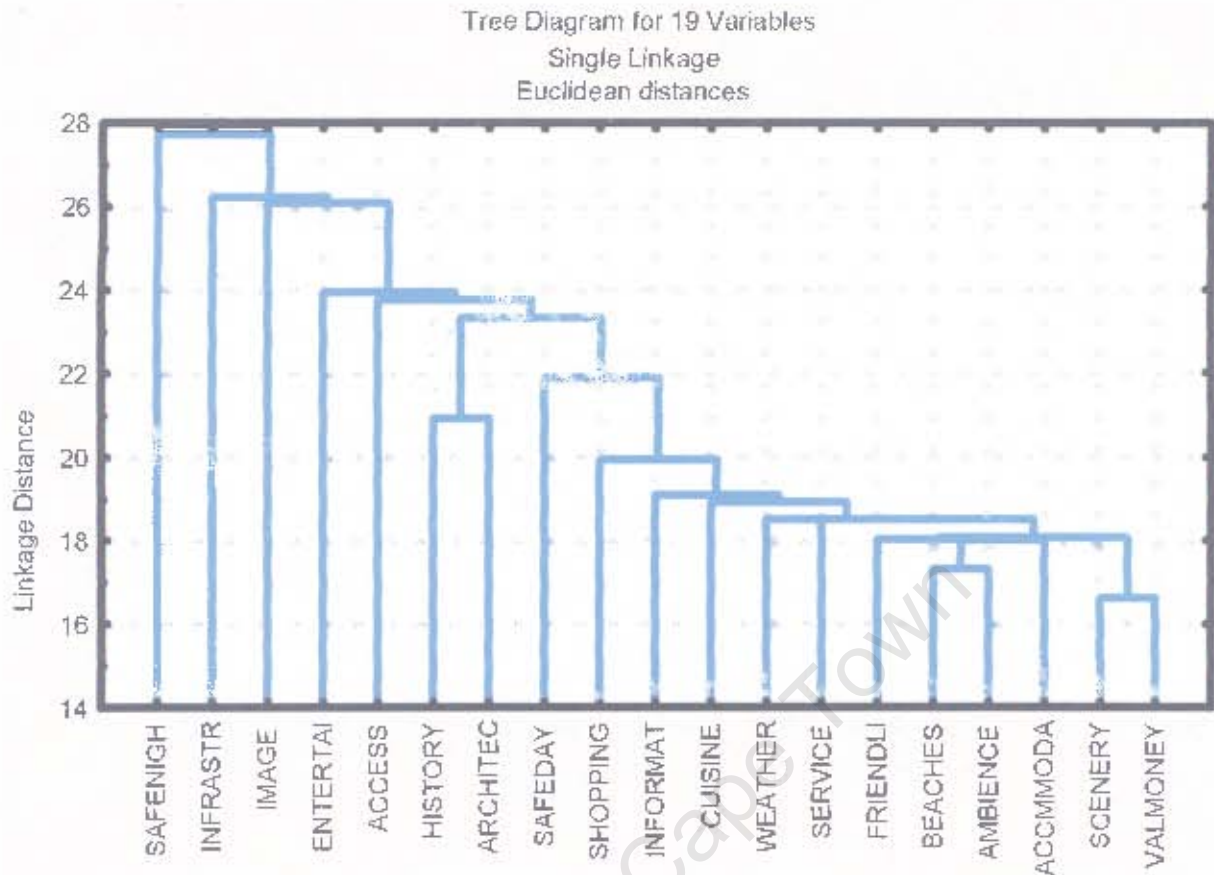


Figure 38: Clusters of Attributes

Based on the above findings, the main hypothesis is accepted. International tourists have better perceptions than expectations.

## 5.7 BRAND IMAGE OF CAPE TOWN

### Secondary Hypotheses

- H<sub>28</sub>:** Cape Town has **no** distinct image according to international tourists.
- H<sub>29</sub>:** Scenic beauty is **not** the most important attribute that differentiates Cape Town.
- H<sub>30</sub>:** Cape Town has an overall negative image as a destination.
- H<sub>31</sub>:** Cape Town has an image worse than any other cities in South Africa.

A positive brand image is created by marketing programs that link favourable and unique associations to the brand in the memory of the potential visitor. Brand associations are reinforced through direct experience with the destination product. The brand associations that potential visitors have of a destination are largely influenced by marketing campaigns, media and word-of-mouth from those that have been to the destination. Therefore, respondents were asked to state their level of agreement or disagreement with the statement - 'Cape Town is **not** marketed properly in my home country'. Respondents from this survey had mixed feelings, only 2.7% strongly disagreed compared to 32.6% who disagreed and 38% who agreed with the statement. Analysis of variance revealed that gender had a significant influence ( $p = 0.0019$ ) on how respondents rated this statement. Females on average tend to disagree more than males. This is perhaps because male travellers' information searching behaviour is different to that of female travellers. Male travellers tend to use the Internet more than female travellers while the latter relies more on travel agents and word-of-mouth. Also, male travellers tend to be more adventurous and venture beyond the 'usual' tourist attractions and therefore they spend more time searching for information on a destination. This explains why they tend to agree to the statement. The same analysis also revealed that a significant difference ( $p = 0.0384$ ) between length of stay and the above statement. The longer respondents stayed in Cape Town, the higher was their level of agreement. This is because they have the opportunity to visit other places besides the ones emphasised by marketing campaigns such as Table Mountain, V&A Waterfront, and Cape Point.

Respondents from Netherlands (53.7%) and Germany (46.9%) seemed to express stronger feelings of disagreement with this statement compared to UK respondents who seemed to strongly agree (16.8%) and agree (41%). This is surprising as South Africa had an intensive marketing campaign in the UK last year and one would expect British respondents to disagree or strongly disagree with the statement above. On average respondents seemed to agree with Cape Town not being properly marketed in their home country (mean-value = 2.77). This suggests that the image they hold of Cape Town in their memory prior to their visit may not be one that particularly stands out from the images projected by competing destinations. Yet the qualitative research findings showed that the image used to market Cape Town in their home country is Table Mountain as recalled by 41.2% of respondents.

Moreover, respondents were asked whether Cape Town had a distinct image in their mind. Indeed 62.6% of respondents agreed that the image (post-arrival) they hold of Cape Town is distinct. Analysis of variance revealed a significant difference ( $p = 0.00351$ ) between how first-time and repeat visitors rated this

statement. Of course repeat visitors had a clearer picture of the destination in their minds than first-time visitors since they agreed more to the statement than the latter. Of respondents that agreed with the statement, a significant difference ( $p= 0.0431$ ) could be established between how German and British respondents rated the statement. Visitors from UK had stronger feelings of agreement than German visitors did. Also, a significant difference ( $p= 0.00126$ ) could be established between main purpose of visit and the statement being discussed. In fact, respondents that were on holiday expressed stronger feelings of agreement than respondents that visited Cape Town for any other purposes. On average respondents had the same feeling of agreement as indicated by a mean value of 2. Consequently hypothesis twenty-eight is rejected at the 5% level of significance. Thus, it seems that the problem is with the image used to market the destination prior to arrival of visitors. However, this contradicts earlier findings that showed on average (mean value of 3.8) respondents were either neutral to the image of Cape Town in their home country or rated it as good.

However, the image that respondents hold of Cape Town in their minds needs to be clarified. They were asked to mention the first **five words** that came to their minds when they think of Cape Town. In its simplest form, this is a measure of brand associations but it also provides an indication of the relative strength, favourability and uniqueness of these associations based on the order of elicitation. Associations that come up first are usually the most powerful ones that respondents hold in memory about the destination. In essence these words describe how Cape Town is positioned as a destination in their mind. As can be seen in **Table 13**, Table Mountain is the word that was most often mentioned as a response (13.4%) out of all words elicited by respondents followed by the sea/beach (9.5%) and sun (8.4%). This confirms the qualitative research findings that showed Table Mountain (44.7%) to be the most strongly associated word with Cape Town followed by beaches/sea (30.5%) and scenic beauty (16.5%). Similarly, 47% of respondents from this survey mentioned Table Mountain as the strongest word they associate with Cape Town. However, 25.5% of respondents disagreed that Table Mountain symbolises what Cape Town has to offer compared to 38.1% that agreed.

Unfavourable associations include 'unsafe/crime' mentioned by 4.1% of respondents followed by poverty. Nevertheless, the range of favourable words used to describe the destination is proof of the unique experience that the destination offers. Words such as 'beautiful/lovely', 'inexpensive', 'friendly people' and 'exciting' should be communicated consistently to position the destination favourably in major target markets. On average respondents mentioned Table Mountain (26.5%) as the first word they associated with

Cape Town followed by sea/beach (11.5%) as the second word, sea/beach (7.69%) and sun (7.52%) as the third words, dining/food (6.3%) as the fourth word and inexpensive (2.7%) and dining/food (2.7%) as the fifth words. This confirms the findings of the qualitative research that showed the same words as above to be associated with Cape Town.

The words above were elicited on a spontaneous basis and may not cover the entire range of attributes that international visitors associate with Cape Town. Consequently, they were asked to choose from a list of words the ones they associate with Cape Town. Words with both positive and negative connotations were included in the list to get a more comprehensive picture of the strengths and weaknesses of the destination. **Table 14** shows that 70.1% of respondents associate 'inexpensive' with Cape Town. The value for money offered by the destination cannot be compared to other places and is indeed a strength that needs to be marketed more vigorously. The hospitality of Capetonians is another strength as it was chosen by 67.5% of respondents as a word they associate with the destination. Beautiful scenery (74%), relaxed atmosphere (63.8%) and the good service standards (40.7%) are strengths too. These confirm findings from the qualitative research that showed the favourable qualities of Cape Town to be its friendliness of locals, scenic beauty, value for money and good service.

As Echtner and Ritchie (1993) found out in their research, respondents tend to recall more of the cognitive components of brand image than affective components. The findings for this research are no different. In fact, a number of different researches on destination image (Ahmed, 1991; Murphy, 1999; Joppe et al., 2001; Heung et al., 2001) came to the same conclusion that respondents tend to emphasise more on cognitive attributes such as scenic beauty, value for money, and friendly people when describing a destination brand rather than affective attributes such as happy, fun, and relaxed.

WORDS	% Of Responses (2057)	% Of Respondents (585)	% Avg. No. Respondents First Word	% Avg. No. Respondents Second Word	% Avg. No. Respondents Third Word	% Avg. No. Respondents Fourth Word	% Avg. No. Respondents Fifth Word
Table Mountain	<b>13.37</b>	<b>47.01</b>	<b>26.50</b>	10.26	5.81	3.42	1.03
Cape Point	3.55	12.48	1.88	3.93	4.10	1.20	1.37
V&A Waterfront	4.67	16.41	1.88	6.84	3.93	3.08	0.68
Sun	<b>8.41</b>	<b>29.57</b>	9.91	7.86	7.52	3.08	1.20
Sea/Beach	<b>9.48</b>	<b>33.33</b>	5.98	<b>11.45</b>	<b>7.69</b>	5.64	2.56
Mountain	2.82	9.91	3.76	3.08	2.22	0.85	0.00
Inexpensive	3.94	13.85	1.71	2.91	2.39	4.10	<b>2.74</b>
Wine	4.42	15.56	1.71	2.91	4.79	4.10	2.05
Dining/Food	<b>5.49</b>	19.32	2.56	3.25	4.44	<b>6.32</b>	<b>2.74</b>
Weather/Climate	3.16	11.11	2.05	2.74	3.42	2.22	0.68
Scenery/Nature	3.45	12.14	2.56	2.39	2.74	2.39	2.05
Variety of things to see	0.78	2.74	0.17	0.51	1.20	0.68	0.17
Destination Similar to Home	0.24	0.85	0.34	0.00	0.34	0.00	0.17
Relax	1.26	4.44	0.51	<b>0.51</b>	1.37	1.20	0.85
Hot	1.75	6.15	2.56	1.71	1.03	0.68	0.17
Friendly People	<b>6.13</b>	<b>21.54</b>	1.54	6.32	6.84	4.96	1.88
Holiday	1.07	3.76	0.68	0.17	1.20	0.85	0.85
Beautiful/Lovely	<b>8.22</b>	<b>28.89</b>	<b>13.33</b>	5.98	3.59	3.59	2.39
Fun	1.17	4.10	1.20	0.85	0.17	0.51	1.37
Different Lifestyle	0.29	1.03	0.17	0.34	0.00	0.51	0.00
Cultural Diversity	<b>1.12</b>	<b>3.93</b>	0.17	1.03	1.71	0.85	0.17
Location/Gateway to Other Places	0.63	2.22	1.03	0.51	0.17	0.34	0.17
Nightlife	0.19	0.68	0.00	0.00	0.34	0.00	0.34
Exciting	1.17	4.10	0.85	1.20	1.20	0.68	0.17
Robben Island	1.60	5.64	0.34	1.54	1.54	0.85	1.37
Unsafe/Crime	1.17	4.10	0.68	0.85	1.03	0.51	1.03
Incomparable	0.44	1.54	0.68	0.34	0.17	0.00	0.34
Kirstenbosch	0.92	3.25	0.17	1.20	1.37	0.51	0.00
Wind	1.46	5.13	1.03	1.20	0.85	1.88	0.17
Flora/Fauna	1.80	6.32	1.54	1.03	1.03	1.88	0.85
South Africa	0.78	2.74	1.37	0.34	0.51	0.34	0.17
Township	0.39	1.37	0.34	0.17	0.68	0.17	0.00
Big City	0.39	1.37	0.85	0.17	0.34	0.00	0.00
Cosmopolitan/Westernized	0.73	2.56	0.51	0.34	0.51	1.03	0.17
Shopping	0.68	2.39	0.17	0.51	1.54	0.17	0.00
Interesting Place	0.58	2.05	1.03	0.17	0.34	0.17	0.34
Clean	0.53	1.88	0.17	0.68	0.51	0.34	0.17
Apartheid	0.24	0.85	0.00	0.51	0.34	0.00	0.00
Laid-back Atmosphere	0.15	0.51	0.00	0.17	0.00	0.34	0.00
History	0.39	1.37	0.00	0.17	0.17	0.85	0.17
Nelson Mandela	0.73	2.56	0.00	1.03	0.17	0.68	0.68
Poverty	0.24	0.85	0.00	0.17	0.17	0.34	0.17

Table 13: Spontaneous Word Associations with Cape Town

Moreover, **Table 14** also shows that 16.2% and 19.7% of respondents associated unsafe and crime respectively with Cape Town. Poverty (48.6%) is a major weakness followed by many street children (26.7%), as they were significant word-associations with the destination. These are potential sources of negative word-of-mouth. Words such as ‘fascinating culture’, ‘vast/spacious landscape’, ‘cosmopolitan city’, ‘variety of activities’ and ‘vibrant atmosphere’ should feature prominently as concepts in future marketing and advertising campaigns.

WORDS	YES	NO
Inexpensive	70.09	29.91
Fascinating culture	40.85	59.15
Sub-standard service	4.62	95.38
Hospitable people	67.52	32.48
Superficial attractions	10.77	89.23
Vast/spacious landscape	53.33	46.67
Cosmopolitan city	56.07	43.93
Vibrant atmosphere	42.39	57.61
Poor road signs	9.40	90.60
Unsafe	16.24	83.76
Exciting ambience	36.58	63.42
New destination	35.21	64.79
Crowded facilities	3.93	96.07
Many street-children	26.67	73.33
Relaxed atmosphere	63.76	36.24
World-class facilities	31.11	68.89
Lush/green environment	47.18	52.82
Crime	19.66	80.34
Expensive	3.08	96.92
Outdoor/adventurous feel	40.68	59.32
Clean and hygienic facilities	52.14	47.86
Variety of activities	52.65	47.35
Diverse people	51.79	48.21
Sleepy atmosphere	4.45	95.55
High service	40.68	59.32
Breathtaking scenery	74.02	25.98
Racial tension	14.53	85.47
Poverty	48.55	51.45
Unspoiled/unpolluted tourist sites	38.12	61.88
Conservative ambience	10.09	89.91

**Table 14:** Probed Word Associations with Cape Town

On the whole, there are more positive words than negative ones associated with Cape Town as a destination. The variety of words provide a significant opportunity for destination marketing organisations to brand the destination using concepts that evoke these words in the most powerful way. Yet unfavourable word associations cannot be ignored, as they are potential sources of negative word-of-mouth. The positioning of Cape Town should be based on factors that are strengths such as value for money, scenic beauty, friendliness of locals and relaxed atmosphere through projected images of Table Mountain, beautiful scenery, lovely beaches and sunny weather. However, these attributes should only be used to the extent that they differentiate the destination from competing destinations. Attributes that are strengths to a destination are not necessarily those that will entice potential visitors to translate their interest in the destination into an actual visit. These attributes will only arouse the interest of the potential visitor to find out more about the destination. The final choice of a destination will eventually depend on how attributes that are strengths rate against other destinations and whether these attributes are **unique** to a destination. Thus, Cape Town should be positioned using attributes that are first and foremost strengths but more importantly, they should be unique in terms of differentiating the destination.

Respondents were asked to **rank four** words from the list of probed responses that they associate the most with Cape Town. The first word is the one they most strongly associate with Cape Town, next one being the second most strongly associated word with the destination, so on and so forth. 'Inexpensive' is the word that was the most often mentioned as a response (12.3%) from the list. A significant number of respondents (45.6%) associated the same word with Cape Town. Based on strength of association, on average respondents ranked 'Inexpensive' as the word they most strongly associate (22.9%) with Cape Town followed by 'hospitable people' (13.3%) as the second most strongly associated word, ranked third was 'relaxed atmosphere' (11.3%) and ranked fourth was 'breathtaking scenery' (10.6%) as shown in **Table 15**. Therefore, these attributes are definitely strengths of the destination but they must still be evaluated against other destinations in terms of their uniqueness. Words such as fascinating culture, vast/spacious landscape, cosmopolitan city, lush/green environment, and variety of activities are also strengths that could potentially be used in marketing the destination but the focus should be on words that were most strongly associated with Cape Town. None of the words that could be described as weaknesses of the destination came up significantly in terms of strength of association. The focus of respondents was mostly on positive attributes.

WORDS	% OF RESPONSES (2166)	% OF RESPONDENTS (585)	AVG. NO. OF RESPONDENTS RANK 1 %	AVG. NO. OF RESPONDENTS RANK 2 %	AVG. NO. OF RESPONDENTS RANK 3 %	AVG. NO. OF RESPONDENTS RANK 4 %
Inexpensive	12.33	45.64	22.91	6.84	8.03	7.86
Fascinating culture	3.92	14.53	3.93	4.79	2.91	2.91
Sub-standard service	0.18	0.68	0.00	0.17	0.17	0.34
Hospitable people	10.76	39.83	9.91	13.33	9.74	6.84
Superficial attractions	0.23	0.85	0.17	0.00	0.17	0.51
Vast/spacious landscape	4.99	18.46	4.27	4.79	5.30	4.10
Cosmopolitan city	7.34	27.18	8.21	5.98	5.98	7.01
Vibrant atmosphere	2.77	10.26	2.05	3.08	2.91	2.22
Poor road signs	0.18	0.68	0.34	0.34	0.00	0.00
Unsafe	1.57	5.81	1.20	1.20	1.03	2.39
Exciting ambience	2.17	8.03	0.68	2.39	2.56	2.39
New destination	3.00	11.11	3.93	3.76	2.05	1.37
Crowded facilities	0.14	0.51	0.00	0.17	0.34	0.00
Many street-children	1.29	4.79	0.68	0.51	2.39	1.20
Relaxed atmosphere	8.17	30.26	2.56	8.72	11.28	7.69
World-class facilities	1.48	5.47	0.68	2.05	0.85	1.88
Lush/green environment	3.88	14.36	1.37	4.10	5.81	3.08
Crime	1.39	5.13	0.85	1.20	1.20	1.88
Expensive	0.00	0.00	0.00	0.00	0.00	0.00
Outdoor/adventurous feel	2.49	9.23	0.68	2.22	3.42	2.91
Clean and hygienic facilities	2.72	10.09	1.03	2.91	3.59	2.56
Variety of activities	4.80	17.78	2.39	5.64	4.10	5.64
Diverse people	3.74	13.85	2.22	3.08	4.10	4.44
Sleepy atmosphere	0.51	1.88	1.54	0.00	0.34	0.00
High service	7.20	26.67	19.49	2.91	1.71	2.56
Breathtaking scenery	8.26	30.60	0.17	10.77	9.06	10.60
Racial tension	0.60	2.22	0.68	0.68	0.34	0.51
Poverty	2.22	8.21	1.88	1.20	1.88	3.25
Unspoiled/unpolluted tourist sites	1.57	5.81	0.00	1.20	1.88	2.74
Conservative ambience	0.09	0.34	0.00	0.00	0.17	0.17

Table 15: Strength of Word Associations with Cape Town

The next section deals with analyses to prove or disprove hypothesis twenty-nine. Previous findings show that value for money, friendliness of people, atmosphere and scenic beauty are attributes that are most strongly associated with Cape Town. These attributes were evaluated without taking into consideration how they perform against competing destinations. Respondents were asked to mention attributes that they

thought differentiated Cape Town as a destination when compared to other countries they had visited. The responses below are spontaneous ones without any probing.

ATTRIBUTES	% OF RESPONSES (1009)	% OF RESPONDENTS (585)
Scenery	20.52	35.38
Culture	6.14	10.60
Diverse/friendly people	15.36	26.50
Value for money	11.20	19.32
Contrast between rich and poor	2.68	4.62
V&A Waterfront	0.99	1.71
Table Mountain	5.35	9.23
Cape Point	0.69	1.20
Location at the southern tip of Africa	2.28	3.93
Nightlife	0.40	0.68
Variety of things to see and do	6.05	10.43
Wine farms	0.99	1.71
Beaches/mountains close to each other	9.42	16.24
History	3.07	5.30
Lifestyle	1.68	2.91
Combo of beach/mountain/weather	4.26	7.35
Good climate/weather	4.96	8.55
Atmosphere	1.98	3.42
Cosmopolitan city	0.89	1.54
Kirstenbosch	0.20	0.34
Nothing	0.89	1.54

**Table 16:** Spontaneous Responses for Attributes that Differentiate Cape Town

As can be seen from **Table 16**, scenic beauty (35.4%), friendliness of locals (26.5%), value for money (19.3%), beaches/mountains (16.2%), culture (10.6%) and variety of things to see and do (10.4%) are attributes that significantly differentiate the destination. They can be used to build the sustainable competitive advantage of the destination. The attributes that differentiate Cape Town are those that stand out as being unique to the destination when compared to other destinations. However, it needs to be clarified which other destinations have respondents visited. **Figure 39** shows that USA (35.2%), Spain (24.3%), France (25.1%), and Italy (19.5%) are the countries that have been visited by a significant number of respondents in the **last four years**. Their evaluation of Cape Town on various attributes and what differentiates it as a destination have been influenced to a large extent by countries they have visited

previously. Visitors tend to assess a destination's offering based on how well it rates against other destinations. Consequently, the attributes that differentiate Cape Town can be used to position the city against countries such as USA, France, Italy and Spain as these attributes are thought to be unique.

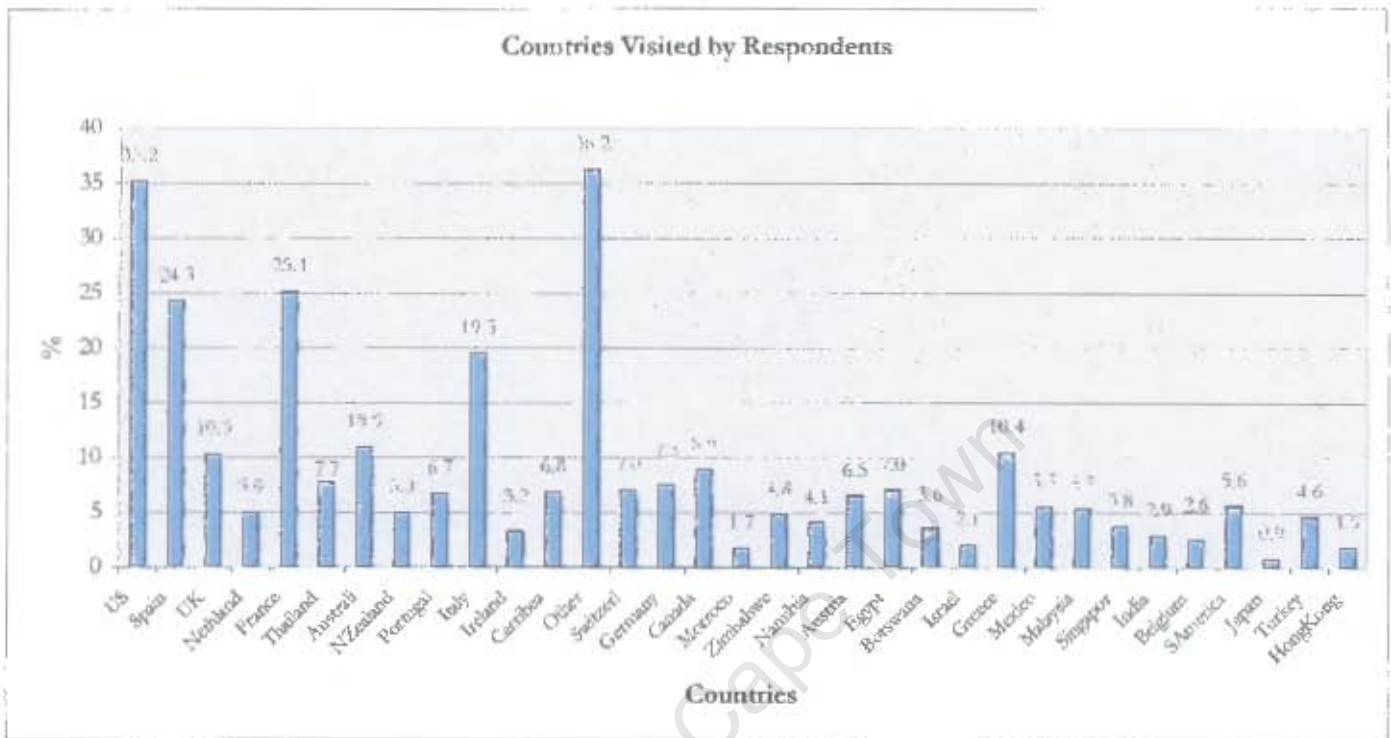


Figure 39: Countries Visited by International Tourists in the Last Four Years

Furthermore respondents were probed on attributes that differentiate Cape Town. Table 17 shows that Table Mountain came up as the most frequent response (26.9%) followed by cultural diversity (18.4%) and scenic beauty (16.4%). Cultural diversity has a significantly lower spontaneous response rate than probed one. Therefore this attribute is either not marketed enough or it does not necessarily stand out as being unique. Table Mountain, on the other hand, being a natural attraction is considered part of scenic beauty. Scenic beauty has both a high spontaneous and probed response rates. This is an attribute that stands out as being unique and is at the forefront of respondents' thoughts when asked about Cape Town. This is the attribute that will sustain Cape Town's competitive advantage if it is marketed properly.

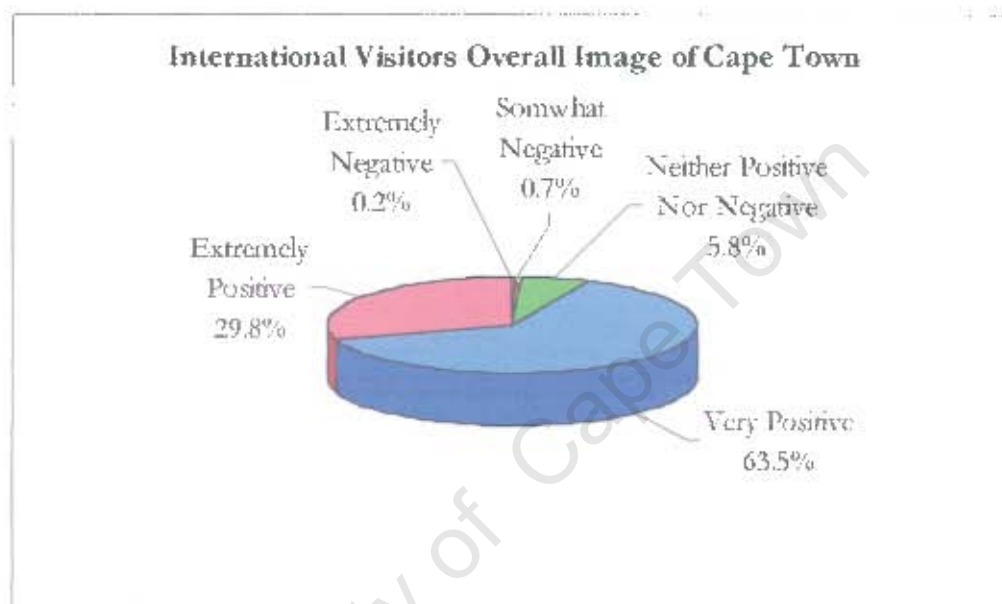
ATTRIBUTES	% OF RESPONSES (278)	% OF RESPONDENTS (585)
Scenery	16.55	7.86
Culture	18.35	8.72
Diverse/friendly people	5.40	2.56
Value for money	2.52	1.20
Rich and poor living alongside	2.88	1.37
V&A Waterfront	0.72	0.34
Table Mountain	26.98	12.82
Location at southern tip of Africa	1.08	0.51
Nightlife	1.08	0.51
Variety of things to see and do	2.52	1.20
Wine farms	0.36	0.17
Beaches/mountains close to each other	1.44	0.68
History	0.72	0.34
Kirstenbosch	0.36	0.17
Combo of all attributes	6.12	2.91
Good climate/weather	6.47	3.08
Atmosphere	3.60	1.71
Cosmopolitan city	1.80	0.85
Cape Point	0.36	0.17
Lifestyle	0.72	0.34

**Table 17:** Probed Responses for Attributes that Differentiate Cape Town

These findings confirm the ones from the qualitative research that showed scenic beauty (23.5%), Table Mountain (22.4%) and friendly people (16.5%) were attributes that differentiated Cape Town. There must be consistency across the various channels used to communicate these attributes to ensure that potential visitors have a clear image of what the destination has to offer and how it satisfies their needs better than any other competing destinations. In essence, these positive brand associations must be reinforced each time potential visitors come across the destination brand to create the desired brand knowledge. Consequently hypothesis twenty-nine is rejected, scenic beauty is the attribute that differentiates Cape Town the most from competing destinations.

Adding to the above, the overall image of a destination is made up of the totality of images that each and every component of the destination experience be it ambience, atmosphere, amenities, and attractions project to the visitor. The overall image of a destination can either be positive or negative. Respondents were asked to evaluate the overall image of Cape Town and 63.5% of them felt that the image is a positive

one. **Figure 40** is proof of the fact that the destination experience is unique as it leaves respondents with only a positive image of the destination. In fact, 45.6% of respondents who said that the image of Cape Town in their home country is poor had a very positive image of the destination. Also of those respondents who agreed that Cape Town has a distinct image in their mind, 68.8% had a very positive overall image of the destination. Of those that did agree with the statement that Cape Town is not marketed properly in their home country, 67.3% had a very positive image of the destination. This suggests that the right expectations are not formed prior to respondents' visit to Cape Town. They do not always have a distinct and positive image of the destination before their visit but leave with a very positive image.

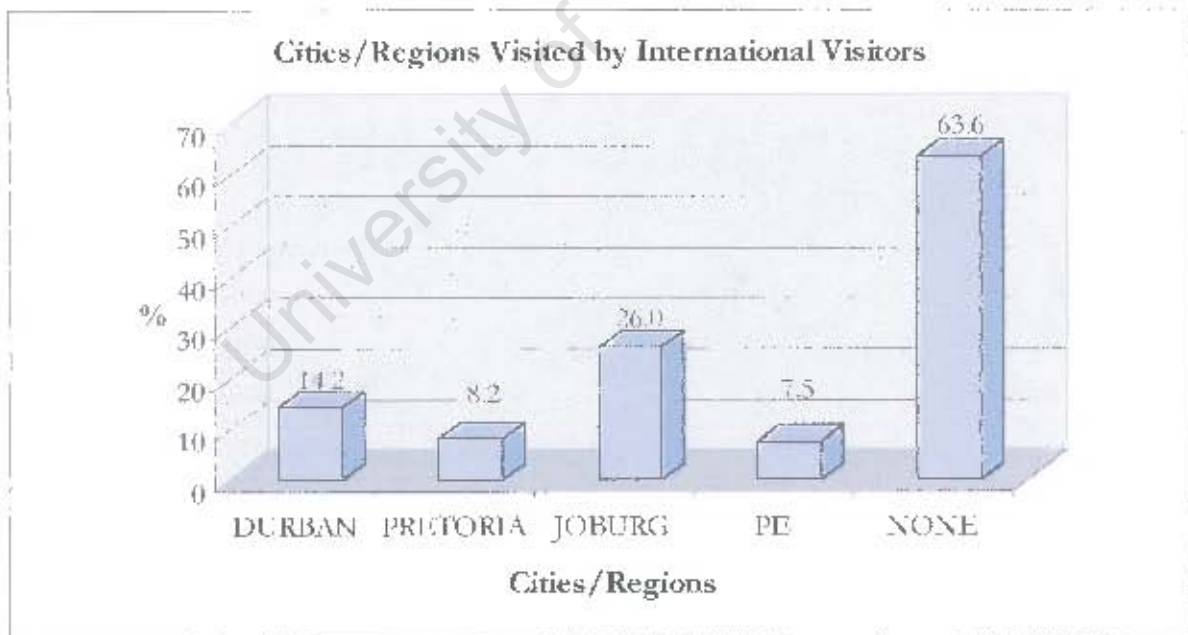


**Figure 40:** International Visitors' Perception of Overall Image of Cape Town

Moreover, the more positive were respondents' image of Cape Town, the more they agreed to the fact that the crime situation is not as bad as they thought it would be, the city offers a unique experience in terms of variety of things to see and do, the city is more beautiful than they expected, they expected their trip to be informative and a unique cultural experience, and they have a distinct image of Cape Town in their minds. However, the more positive were respondents' image of Cape Town, the more they expected to see high poverty levels and the more they either agreed or were neutral on the city offering very little of an 'African' experience. The overall positive image that respondents have of Cape Town contributes significantly towards positive word-of-mouth, greater likelihood of recommendation and future visits. Of those respondents that had a very positive image of the destination, 53.1% strongly agreed that they would definitely say positive things about the city to family, friends, and colleagues, 65% were very likely to

recommend the destination to others, 81.5% were very satisfied with the destination experience, and 44.6% were very likely to revisit. Based on the findings above, hypothesis thirty is rejected and it can be concluded that Cape Town has an overall positive image as a destination.

The following analyses will prove or disprove hypothesis thirty-one. Respondents were asked firstly about the different cities they had visited within South Africa. A significant number (63.6%) of them had not visited any other cities. This suggests that cross selling of cities by destination marketing organisations have been ineffective so far. Respondents were further asked as a perception statement whether Cape Town is different from the rest of South Africa. On average respondents agreed (mean value 2.35). Analysis of variance revealed a significant difference ( $p= 0.00009$ ) in mean rating of this statement based on first or repeat visits. First-time visitors were more neutral than repeat visitors who mostly agreed. This is because repeat visitors have had more opportunities to see other places in South Africa than first-time visitors. Of course the longer respondents stayed in South Africa, the higher was their level of agreement with the statement. Now that it has been established that Cape Town is different from South Africa, it is crucial to identify what makes Cape Town different. Of all respondents, only 26% and 14.2% had visited Johannesburg and Durban respectively as shown in **Figure 41**. Thus the following findings should be interpreted with caution given that only 36.4% of respondents had visited other cities in South Africa.



**Figure 41:** Cities/Regions Visited by International Visitors

Respondents were asked to rate the cities they had visited against Cape Town on a number of attributes using the scale below.

1 = Better than Cape Town    2 = Similar to Cape Town    3 = Worse Than Cape Town

Figure 42 shows that dimension one explains most of the variation in the data and thus should be the only dimension that is interpreted to identify significant associations. As a rule of thumb, there is no significant relationship between row co-ordinates and column co-ordinates falling between +0.2 and -0.2. Thus on the left hand side of the perceptual map there is a significant association between the following attributes (Durban safety, Johannesburg safety, Pretoria activities, PE attractions, PE nightlife, Johannesburg activities, PE activities, Pretoria attractions and Durban attractions) and worse than Cape Town. On average respondents rated these attributes as being worse than Cape Town.

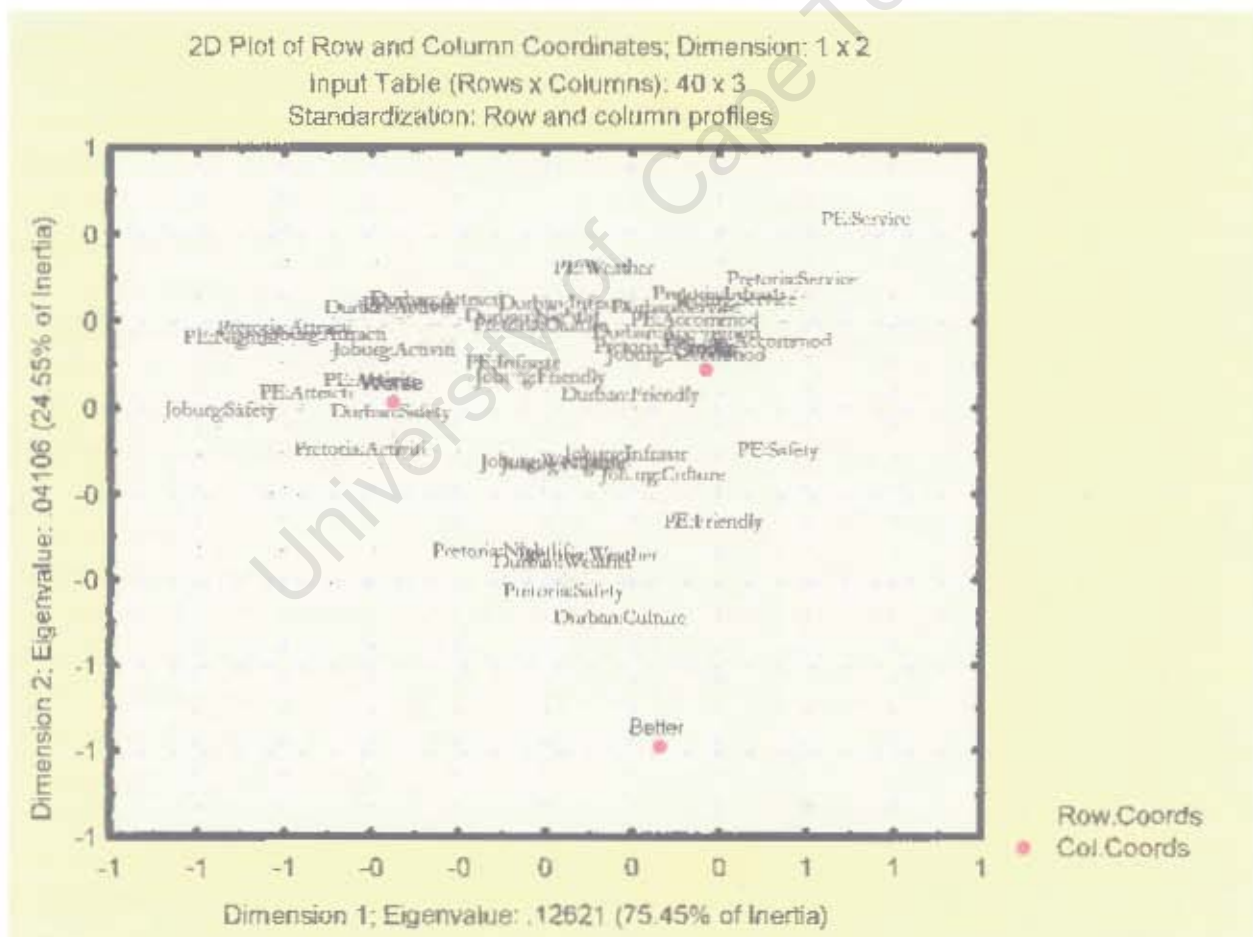


Figure 42: Perceptual Map of Attributes Rating of Cape Town vis-à-vis other Cities

Similarly, there is a weaker association between the following attributes (Johannesburg infrastructure, Johannesburg culture and Durban friendliness) and better than Cape Town. The other significant association is the one between similar to Cape Town and the following attributes (PE friendliness, Pretoria friendliness, Johannesburg accommodation, Pretoria accommodation, Durban accommodation and PE accommodation). Thus it can be deduced that accommodation in general is perceived to be similar to Cape Town while attractions, variety of activities and safety of other cities are considered worse than Cape Town. The qualitative research showed more or less the same finding that Cape Town offers a better experience than other cities in South Africa. Consequently hypothesis thirty-one is rejected. Cape Town has a better image than any other cities in South Africa.

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**Main Hypothesis:** Cape Town has no appealing brand image.

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Word associations with Cape Town revealed that Table Mountain, beaches/sea and scenic beauty define the destination. Probing of respondents revealed that 70.1% associate 'inexpensive' while 67.5% associate 'hospitable' with the destination. Relaxed atmosphere (63.8%) and good service standards (40.7%) were also strongly associated with the destination. Scenic beauty was mentioned by 35.4% of respondents as the attribute that differentiates the destination the most followed by friendly people, value for money and beaches. Attributes such as Table Mountain and diversity of culture further define the image of the city. Negative images are primarily made up of attributes such as unsafe (16.2%), crime (19.6%), many street children (26.7%), and poverty (48.5%). Yet the range of positive attributes mentioned by respondents on a spontaneous basis far outweighs the negative ones and respondents focused on the negative aspects mostly when probed. This suggests that negative aspects of the destination are not of a major concern. They affect destination choice and expectations but perceptions are very positive. In fact, of respondents, 63.5% rated the destination as having a very positive overall image. The city is perceived to offer a better experience than many other cities in South Africa. Consequently, the main hypothesis above is rejected, Cape Town has an appealing brand image. The qualitative study showed that the brand personality of Cape Town is defined by words such as young, ambitious, excitement, fun, wealthy, and classy amongst others. The brand fingerprint showed that the image of the destination is one of scenic beauty, mountains, and sea evoking feelings of happiness, relaxation and warmth.

## 5.8 ATTITUDE OF TOURISTS TOWARDS BRAND CAPE TOWN

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### Secondary Hypotheses:

- H<sub>32</sub>: International tourists are **not** likely to revisit.
  - H<sub>33</sub>: International tourists are **not** likely to recommend the destination to others.
  - H<sub>34</sub>: International tourists are **not** satisfied with the destination experience.
- 

Research by Kozak and Rimmington (2000) showed a significant relationship among tourist satisfaction, intention to return and positive word-of-mouth communication. This means that favourable tourist perceptions and attitudes are potentially an important source of competitive advantage. Of all respondents, 54.8% are very likely to revisit Cape Town as shown in **Figure 43**. In fact, repeat visitors (69.8%) more than first-time visitors (46.8%) are very likely to revisit. There is also a significant relationship between number of days stayed in Cape Town and likeliness of revisit ( $p = 0.00$ ). The longer respondents stayed, the more likely they were to revisit. Of respondents who stayed between one-to-five days, for example, only 32.4% were very likely to revisit compared to 80.4% of those who stayed for more than thirty days in Cape Town. Similarly, there was a significant relationship ( $p = 0.024$ ) between length of stay in South Africa and likeliness of revisiting Cape Town. The longer respondents stayed in South Africa, the higher was their likelihood of coming back to Cape Town. Of those who were likely and very likely to revisit Cape Town, a significant number of them were between the ages of twenty-four to thirty-five. The younger respondents were, the more likely they were to revisit ( $p = 0.0012$ ). Thus, hypothesis thirty-two is rejected at the 5% level of significance, international tourists show strong intentions of revisiting Cape Town.



**Figure 43:** International Visitors' Likelihood to Revisit

Moreover, most respondents strongly agreed (59.1%) and agreed (38.3%) that they will definitely say positive things about the city to friends, relatives and colleagues. This is much-needed positive word-of-mouth about the destination. Of those that strongly agreed they would spread positive word of mouth, 66.6% were very likely to revisit Cape Town. Nevertheless, 69.4% of respondents were very likely to recommend the destination to others as shown in **Figure 44**. Repeat visitors were more likely to recommend the destination than first-time visitors ( $p = 0.0032$ ). The longer respondents stayed in Cape Town, the more likely they were to recommend it to others ( $p\text{-value} = 0.0145$ ). The younger respondents were, the more likely they were to recommend the destination ( $p = 0.041$ ). Of course those respondents that were extremely satisfied with the destination experience were the ones most likely to recommend (90.6%) the destination to others. Similarly, 70.4% of respondents who were very likely to recommend the destination to others were also very likely to revisit. Consequently hypothesis thirty-three is rejected at the 5% level of significance. International visitors are very likely to recommend the destination to others.



**Figure 44:** International Visitors' Likelihood to Recommend Cape Town

In terms of satisfaction levels with the destination experience, most respondents were either very satisfied (61.1%) or extremely satisfied (33.2%) as shown in **Figure 45**.



**Figure 45:** International Visitors' Overall Satisfaction with Destination Experience

In contradiction to previous findings, there was a significant relationship ( $p= 0.0072$ ) between length of stay in Cape Town and overall satisfaction with the destination experience. The longer respondents stayed in Cape Town, the lower were their satisfaction levels with the destination experience. This is perhaps because the risk of being exposed to the negative aspects of the destination such as crime, street-children and poverty becomes higher. Of respondents that were either extremely satisfied or very satisfied with the destination experience, the majority were from UK. Furthermore, of those respondents that were extremely satisfied with the destination experience, 79.7% will spread positive word-of-mouth, 78.7% are very likely to revisit and 71.5% have an extremely positive image of the destination. Consequently, hypothesis thirty-four is rejected at the 5% level of significance. International visitors are extremely satisfied and very satisfied with the destination experience.

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**Main Hypothesis:** International tourists have a positive attitude towards brand Cape Town.

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A positive overall brand attitude stems from favourable brand associations that are created by convincing consumers that the brand has relevant attributes and benefits that satisfy their needs and wants. Previous findings showed that some of the most powerful brand associations with Cape Town were scenic beauty, friendliness of locals and value for money. Brand attitudes are important because they often form the basis for actions (repeat purchase and brand choice) and behaviour (positive word-of-mouth, brand preference, and willingness to recommend) that consumers take with the brand. The findings above suggest that respondents have a very favourable attitude towards brand Cape Town. Their future behaviour (word-of-mouth, revisit, and likeliness to recommend) indicates their very positive attitude towards the brand. The qualitative report also showed similar findings that visitors have a very positive attitude towards the brand. In some instances the brand exceeds expectations while in others it falls short. Consequently, the main hypothesis above is accepted.

## 5.9 SUMMARY OF HYPOTHESES ACCEPTANCE AND REJECTION

<b>INTERNATIONAL VISITORS SURVEY</b>		
<b>FACTORS INFLUENCING DESTINATION CHOICE</b>		
<b>Main Hypothesis</b>	There is more than one factor that influences destination choice.	<b>Accepted</b>
<b>Secondary Hypotheses</b>		
H <sub>1</sub>	Good climate/weather is not considered to be an important factor influencing destination choice.	<b>Rejected</b>
H <sub>2</sub>	Value for money is not an important consideration influencing destination choice.	<b>Rejected</b>
H <sub>3</sub>	Scenic beauty is not an important consideration influencing destination choice.	<b>Rejected</b>
H <sub>4</sub>	Personal safety is not considered to be an important factor influencing destination choice.	<b>Rejected</b>
H <sub>5</sub>	Culture is not an important factor influencing destination choice.	<b>Rejected</b>
H <sub>6</sub>	Destination image is the single most important factor influencing destination choice.	<b>Rejected</b>
H <sub>7</sub>	There are no significant differences in mean importance rating of factors influencing destination choice based on international tourists' demographic characteristics.	<b>Rejected</b>
H <sub>8</sub>	There are no significant differences in mean importance rating of factors influencing destination choice based on international tourists' travelling characteristics.	<b>Rejected</b>
<b>SOURCES OF INFORMATION INFLUENCING THE CHOICE OF CAPE TOWN AS A DESTINATION</b>		
<b>Main Hypothesis</b>	Word of mouth has the most influence on the choice of Cape Town as a destination.	<b>Rejected</b>
<b>Secondary Hypotheses</b>		
H <sub>9</sub>	Word-of-mouth is not the most influential source of information on Cape Town.	<b>Rejected</b>
H <sub>10</sub>	There are no significant differences in international tourists' perceptions of the most influential sources of information based on demographic characteristics.	<b>Rejected</b>
H <sub>11</sub>	There are no significant differences in international tourists' perceptions of the most influential sources of information based on travelling characteristics.	<b>Rejected</b>
<b>INTERNATIONAL TOURISTS' EXPECTATIONS OF CAPE TOWN</b>		
<b>Main Hypothesis</b>	International tourists have the wrong expectations.	<b>Accepted</b>
<b>Secondary Hypotheses</b>		
H <sub>12</sub>	International tourists do not expect a city that is developed.	<b>Rejected</b>
H <sub>13</sub>	International tourists do not expect a city that offers a unique experience.	<b>Rejected</b>
H <sub>14</sub>	International tourists do not expect to see crime.	<b>Accepted</b>

H <sub>15</sub>	International tourists do not expect to see poverty.	Rejected
<b>INTERNATIONAL TOURISTS' PERCEPTIONS OF CAPE TOWN</b>		
Main Hypothesis	International tourists have better perceptions than expectations.	Accepted
<b>Secondary Hypotheses</b>		
H <sub>16</sub>	International tourists do not perceive the city to be friendly.	Rejected
H <sub>17</sub>	International tourists do not perceive the city to be beautiful.	Rejected
H <sub>18</sub>	International tourists perceive the city to offer very little of an 'African' experience.	Accepted
H <sub>19</sub>	Cape Town does not rate favourably on safety.	Accepted
H <sub>20</sub>	Cape Town does not rate favourably on value for money.	Rejected
H <sub>21</sub>	Cape Town does not rate favourably on destination image.	Neither Accepted Nor Rejected
H <sub>22</sub>	Cape Town does not rate favourably on attractions.	Rejected
H <sub>23</sub>	Cape Town does not rate favourably on accessibility.	Rejected
H <sub>24</sub>	Cape Town does not rate favourably on infrastructure.	Accepted
H <sub>25</sub>	Cape Town does not rate favourably on ambience.	Rejected
H <sub>26</sub>	There are no significant differences in international tourists' mean ratings of attributes that influence the choice of Cape Town as a destination based on demographic characteristics.	Rejected
H <sub>27</sub>	There are no significant differences in international tourists' mean ratings of attributes that influence the choice of Cape Town as a destination based on travelling characteristics.	Rejected
<b>CAPE TOWN BRAND IMAGE</b>		
Main Hypothesis	Cape Town has no appealing brand image.	Rejected
<b>Secondary Hypotheses</b>		
H <sub>28</sub>	Cape Town has no distinct image according to international tourists.	Rejected
H <sub>29</sub>	Scenic beauty is not the most important attribute that differentiates Cape Town.	Rejected
H <sub>30</sub>	Cape Town has an overall negative image as a destination.	Rejected
H <sub>31</sub>	Cape Town has an image worse than any other cities in South Africa.	Rejected
<b>ATTITUDE OF INTERNATIONAL TOURISTS TOWARDS BRAND CAPE TOWN</b>		
Main Hypothesis	International tourists have a positive attitude towards brand Cape Town.	Accepted
<b>Secondary Hypotheses</b>		
H <sub>32</sub>	International tourists are not likely to revisit.	Rejected
H <sub>33</sub>	International tourists are not likely to recommend the destination to others.	Rejected
H <sub>34</sub>	International tourists are not satisfied with the destination experience.	Rejected

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# CHAPTER 6

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## OVERALL CONCLUSIONS

## 6. CONCLUSIONS

Based on the findings from the qualitative and quantitative research components of this investigation, the following conclusions can be drawn.

### 6.1 DESTINATION MARKETING CONCLUSIONS

#### **Cape Town lacks consistency in marketing**

- Marketing of Cape Town for tourism purposes has been done on an ad-hoc basis so far with no clear idea of what is being marketed and how it must be marketed to promote economic growth within the province. The destination can only succeed through cooperation between the private and public sector where roles and responsibilities of each are clearly defined.

#### **A flexible framework is needed**

- Focused strategies that addressed the needs of both customers and stakeholders can only be developed through a flexible framework that allows constant evaluation and feedback from all parties concerned. Regular marketing research activities will allow the needs of customers to be addressed while various tourism boards (local and regional) should address the needs of stakeholders.

#### **Cape Town needs a co-ordinated strategy**

- The importance of strategy co-ordination across all sectors affecting the tourism industry is critical for the success of the brand. The existence of various logos and slogans are examples of lack of co-ordination. This creates confusion among potential visitors with regards to Cape Town and Western Cape as destinations. International visitors surveyed had mixed feelings about whether Cape Town is marketed properly in their home country. Of respondents, 38% agreed that the city is not well marketed in their home country while 32.6% disagreed. The longer respondents stayed in Cape Town, the higher was their level of agreement. This suggests there is more to the destination than what is emphasised in marketing campaigns in visitors' home country. The longer they stayed, the better was their opportunity to experience the various facets of the destination.

**Cape Town's distinctive advantages are not really known**

- Given that many facets of the destination surprised international visitors, suggest that the right expectations were not created. The distinctive advantages of the place need to be communicated more vigorously. Tourists will choose places that offer the fullest realisation of their expectations (Goodall and Ashworth, 1988). Therefore the various institutions marketing the brand currently need to be combined to create one holistic body striving for a single goal. In this way problems and opportunities can be dealt with a larger proportion of the budget. The JMI will hopefully reduce the perceived fragmentation of the industry and the restructuring process will improve competitiveness.

**Awareness of Brand Cape Town is low in some very profitable markets**

- Different countries have different mindsets and thus advertising messages need to be tailored to appeal to each different country that is targeted. There is agreement that the budget allocated to tourism is insufficient to market the destination properly. Therefore correcting existing negative perceptions about the destination is often sacrificed for brand awareness. This is why South Africa needs to be established as the dominant brand that makes people think positively about the country. Then Cape Town can position itself as the sub-brand that offers excitement, adventure, and relaxation. Until such a positioning is achieved, the impact of marketing campaigns in profitable markets such as USA, Australia and Western Europe will be minimal. The propensity of confusing potential visitors will increase if Cape Town and South Africa are not correctly positioned.

**The product offered is world-class and the destination can be positioned as ideal for different types of activities**

- A holistic approach to destination management must be adopted to improve offering to tourists, attract more visitors and generally help the industry to grow profitably and move in the right direction. The variety of factors that influenced international visitors to holiday in Cape Town suggests that the brand has diverse appeal. Knowing how to leverage each of these 'appeal' to different target markets will undoubtedly improve competitiveness of the destination. Emphasising the right mix of tangible and intangible elements in advertising and promotional activities will capture the attention of the desired target markets.

### **Cape Town and South Africa as brands need fine-tuning**

- 17.6% of international tourists interviewed for the qualitative research mentioned Cape Town as a word association with South Africa while none mentioned South Africa as a word association with Cape Town. The latter was confirmed through the empirical research as well. Therefore South Africa is not established as a destination supra brand. It makes sense to market Cape Town as the main brand and South Africa as a sub-brand in the short term to create awareness of the latter. However there must be no attempt to turn Cape Town into South Africa or Africa as the product is distinct and different and needs no changing but mere fine-tuning.
- In the long term, South Africa needs to be established as the supra brand. Cape Town, which is currently marketed as a separate entity from the rest of South Africa and the region needs to be marketed as the sub-brand. Linkages between the two brands need to be improved once negative connotations with South Africa are addressed. Cape Town's link as the gateway to Africa perhaps needs to be emphasised more in future marketing campaigns.

### **Cape Town has a distinct image post arrival**

- Has Cape Town got a clearly defined image? The city still needs to find a unique concept such as the 'Big Apple' for New York city around which it can market itself and build the brand. Successful destinations are using not only their generic attractions but combining them with the ambience and way of life of local people to market themselves and these are having unprecedented effects. The marketed image at present is too restrictive since Table Mountain and beaches are the strongest associations with the brand and many unique selling points such as culture, diversity of experiences, warmth of people have to date been overlooked. International visitors (62.6%) agreed that the image (post-arrival) they hold of Cape Town is distinct. Yet they do not always have a positive image of the destination prior to their visit. Thus the image of Cape Town among international visitors is more positive after their visit. This is clearly an issue that needs to be resolved as there is a gap between primary image and actual image of the destination as suggested by Lubbe (1998) and Chon (1990, 1992). Communication campaigns must therefore address this gap between expectations and perceptions.

### **Image of Cape Town through the media is not always positive**

- There is the need for a very strong media campaign aimed at different sectors of the media, positioning the strengths of this country. Potential first time visitors are most affected as they are unaware of the reality of the situation. Their concern in terms of safety and security must be more vigorously addressed through proper communication and dissemination of information. Uncoordinated marketing of the brand and negative word of mouth can even cause more damage. The media cannot be controlled but achieving a balance between positive and negative reporting of news is critical to change the perceptions of the international community towards the country in the first place. This will contribute toward tourism brands being viewed more positively among international travellers.

### **Crime has tarnished brand image of Cape Town**

- From the qualitative research findings, international tourists associate crime more with South Africa (14.1%) than Cape Town (2.4%). This does not suggest that negative perceptions about crime or safety do not exist with regards to Cape Town. Only 4.1% of international visitors mentioned crime as a spontaneous word association with Cape Town while 19.6% associated the same word with the destination when probed. Tourists still needs to be informed that they have to treat Cape Town much like any other cities in the world. The crime element is always present but tighter control needs to be exercised on tourist safety. This should be done to prevent further negative word-of-mouth spreading from current visitors to potential visitors.

## **6.2 INFORMATION SEARCH BEHAVIOUR CONCLUSIONS**

### **Word-of-mouth is the most important informal source of information and recommendation about the destination**

- Consumers tend to rely more on informal sources of information in the final stages of their decision making process to reinforce what was found through formal sources at the beginning of their search for a holiday destination (Um and Crompton, 1992). The qualitative study showed that international visitors (38.8%) relied on word-of-mouth to plan their holidays. Most (61%) of them heard about Cape Town from family and friends. Family (17.6%) and friends (44.7%) were also the most important source of recommendation. Therefore, word-of-mouth is an important source of information about Cape Town. However, word-of-mouth is not the only factor that influences destination choice. Unfulfilled expectations of current visitors will affect what they say to others, which in turn can lead to the

destination not even being considered for a holiday. The converse is also true, positive word-of-mouth can influence potential visitors to choose Cape Town for holiday purposes. The quantitative survey confirmed that word-of-mouth is the most influential source of information about the destination with 45% of respondents ranking it on average as first. There were two second most influential source of information namely travel guidebooks and the Internet. The third most influential was travel guidebooks again followed by brochures/pamphlets in the fourth place

- Equally important is the fact that 15.3% of visitors surveyed for the qualitative research did not rely on recommendations from anybody to visit Cape Town. Intermediaries such as travel agents and tour operators do not influence these respondents either. Therefore marketing to these independent travellers requires an understanding of sources of information they use. They are more likely to make use of the Internet, guidebooks and information centres. Thus these mediums of information dissemination must be comprehensive and paint a positive picture of the destination without ignoring its weaknesses. However, it must not be assumed that travel intermediaries have no influence on destination choice. Those that plan their holidays on their own (25.8%) will still make use of travel to book for air tickets and accommodation. These intermediaries can therefore influence brand image and brand expectations. Their advice can affect whether the visitor has a positive or negative mindset towards the destination prior to their visit.

#### **Overseas information availability on the destination is neither rich nor poor**

- Information availability and quality influence consumers' perceptions of a destination (Mansfeld, 1992). These perceptions in turn affect destination choice. The qualitative research showed that above the line media seemed to be ineffective in attracting first time visitors. Marketing intermediaries such as travel agents were perceived as not encouraging potential travellers to choose the destination either. Yet the quantitative research found that 25.8% of respondents made use of travel agents while 64.1% used travel guidebooks. The Internet was used by 55.2% of respondents. Also, 51.9% of international visitors agreed that there was sufficient information available on the destination in their home country. Therefore there is no conclusive evidence that information availability on the destination overseas is either rich or poor.

### **Media options to be used when marketing the destination**

- The empirical research showed that 74.1% of respondents made use of word-of-mouth at some point in their decision to visit Cape Town. However, the impact of word-of-mouth is not measurable and that is why industry stakeholders must strive to give tourists the best experience possible. Respondents also used brochures/pamphlets (25.6%), travel guidebooks (64.1%) and the Internet (55.2%). The Internet is thought to be critical for the success of a destination but on-line branding tactics must be integrated with above the line and below the line marketing strategies. Thus multi-media options must be used to effectively communicate to international travellers. These media must be co-ordinated to consistently project the same image and message.

## **6.3 FACTORS INFLUENCING DESTINATION CHOICE**

### **Climate, value for money, culture, scenic beauty and personal safety influence destination choice**

- Factors such as climate, personal safety and quality of accommodation affect the choice of any destination (Hu Ritchie, 1993; Heung et al., 2000; Andreu et al., 2000). The qualitative component of this particular study shows that international tourists consider factors such as climate/weather (32.9%) and value for money (25.9%) to be the most important when choosing a destination. Culture is a major draw card if one considers that 21.2% of respondents mentioned their main activity at a destination to be experiencing the local culture and 22.4% mentioned it as a factor influencing their choice of a destination. Given that a significant number of respondents have visited countries such as France (38.8%), Italy (20%), and Spain (28.2%) that are renowned for their distinct culture, tend to confirm the proposition above.

### **Friendly people and unspoiled environment influence destination choice**

- The quantitative survey among international visitors confirms that good climate significantly influences destination choice given that 46% of respondents rated it as being very important. Value for money is important (51.2%) too. Yet the most important factor is beautiful scenery and natural attractions with a mean of 1.65 Personal safety is another very important factor as mentioned by 46.3% of respondents. Females attached more importance to personal safety than males when choosing a destination. Therefore more emphasis must be placed on destination safety in marketing and communication campaigns depending on the target market. Culture is also of importance since 52.1% of international visitors rated this factor as important while 24.7% rated it as very important. 'Interesting and friendly

people' and 'unpolluted and unspoiled environment' are considered very important too. Therefore choice of a destination is influenced by a myriad of factors. This is further complicated by potential visitors having a different set of factors for each destination considered (Um and Crompton, 1992).

#### **Visiting family and friends influence the choice of Cape Town as a holiday base**

- Destination choice is dependent on the positiveness or negativeness of perceptions of potential visitors towards a destination (Seddighi et al., 2001). The qualitative research showed that the main reason why tourists visited Cape Town was scenic beauty (31.1%), good weather, product diversity and mere curiosity. The quantitative study found that visiting family and friends (26.8%) influences this choice to a large extent. Scenery (18.1%), value for money (18.3%) and word-of-mouth (14.7%) affect to some extent the choice of Cape Town as a destination. Of respondents, 38.3% chose Cape Town because it offers a consistently good climate/weather. There is good synergy between factors influencing destination choice and factors that led to the choice of Cape Town.

#### **International visitors are concerned about safety of the destination**

- Surprisingly in-depth (8.2%) interviewees seem to assign less importance to safety and security as being a factor influencing destination choice in the qualitative study. Yet only 11.8% of international tourists mentioned that the city is safer than expected. This indicates the existence of a potential gap between expectations and perceptions of safety among international tourists. On the other hand, the empirical research showed contradictory findings given that on average respondents rated personal safety as being very important to important in destination choice. On average international visitors also agreed to strongly agreed that the crime situation is not as bad as they thought it would be. Therefore there seems to be a concern for safety prior to their visit but once in Cape Town, they perceived the city to be much safer.
- The threat of political instability, crime and violence are major deterrents to even consider a destination as a potential holiday base because they influence safety perceptions (Goodrich, 1978). Cape Town rates neutral on average for safety during day and night. This will influence what visitors say to others on safety of the destination. Tourism growth is clearly hampered by such negative perceptions of safety.

**Ultimate choice of a destination is influenced by a complex set of factors**

- Nevertheless, the fundamentals of destination choice rest in satisfaction of needs for tourists such as a need for relaxation or excitement or novelty. Social agreement, which refers to, what social groups think of the destination influence destination choice as shown by 14.7% of international visitors stating that word-of-mouth was the main factor influencing their choice of Cape Town. Yet travelability factors such as time, income and health determine whether the consumer can actually travel. All these influences on destination choice make it difficult to pinpoint the most important factor when choosing a destination. Repeat visitors, for example, have a different set of factors than first-time visitors when choosing a destination. Repeat visitors have first hand experience with the destination product and therefore have clear expectations. However, first time visitors are unsure of what to expect and they rely predominantly on image and word-of-mouth to make their choice. In terms of consumer behaviour, destination choice is the result of a congruity between three factors namely destination attributes, destination image and self-image. The potential visitor evaluates and compares the destination attributes and image with his or her self-image. The greater the congruity, the greater the likelihood that the destination is chosen for holiday purposes (Ashworth and Goodall, 1990; Sirgy and Su, 2000).

## **6.4 DESTINATION IMAGE INFLUENCES DESTINATION CHOICE**

**Destinations with positive images are more likely to be considered as a holiday base than those with negative images**

- Image has been defined and interpreted by various authors in different ways. Destination image affects destination choice (Gunn, 1972; Gartner, 1993; Baloglu, 1997). Consumers tend to evaluate destinations on their projected images. Destinations with positive images are more likely to be considered for holiday purposes than those with negative ones. First, a destination has no chance of being selected for holiday purposes unless it figures amongst a potential visitor's current set of mental images. Second, where the destination does figure in the current set of images held by the potential tourist, this image must be a positive one in order to be selected in preference to an alternative. Third, where the tourist is successfully enticed to a destination it is equally important that the satisfaction derived from the destination experience at least matches expectations created by the image. Otherwise the tourist is unlikely to revisit or recommend the destination to others. Indeed the dissatisfied tourist may contribute towards dissemination of a negative image of the destination. Personal images can therefore be

influenced, manipulated and even created to position a destination favourably in consumers' minds (Goodall and Ashworth, 1988: 10).

### **Destination image affects destination choice**

- The qualitative study showed that destination image is considered important by 27.1% of international visitors while 24.7% considered it to be unimportant. Those that considered image to be very important said that they would not choose a destination if the image was not appealing. Those that considered image to be unimportant said that image is not usually a true reflection of reality. A negative image is a deterrent to even consider a destination as a possible holiday destination. The destination not having a distinct image is a major source of concern. The lack of a clear image therefore does not help in positioning the destination in the potential visitor's mind. Perception of a place is more important than reality. Yet image is subjective to experience levels, first time visitors are more influenced by image than repeat visitors. Image is also dependent on the target market and the type of holiday/activities being marketed. A business tourist assigns virtually no importance to image while holidaymakers are influenced to a large extent by image. The quantitative study confirmed qualitative research findings given that destination image was rated as important on average in choosing a destination. Destination image was particularly important to respondents from UK, Germany and Netherlands.

### **Visual imagery forms a significant part of the image of a destination**

- The city of London has been particularly good at creating a rich visual imagery of the place. A combination of attractions that have historical appeal such as London Bridge, Buckingham Palace, Big Ben and Victoria Station have been marketed simultaneously with new attractions such as the Millennium Dome. A similar approach can be used to market Cape Town where historical assets such as Robben Island and Bo-Kaap must be marketed in conjunction with the new convention centre and Canal Walk. These create a rich imagery of the destination that offers a diversity of experiences. Though attractions contribute greatly to attractiveness of Cape Town, there is scope to promote other aspects such as ambience, culture, atmosphere, festivals, events and amenities to improve brand image further.

### **Cape Town rates favourably on cognitive and affective components of destination image**

- Destination image has both cognitive and affective components (Gartner, 1993; Baloglu and Brinberg, 1997; Baloglu and McCleary, 1999). The cognitive components are usually the beliefs or knowledge about a destination's attributes and are formed by external factors, which include various sources of

information such as symbolic stimuli (promotional effort of a destination) and social stimuli (word of mouth) (Baloglu and McCleary, 1999: 148). Destinations have been traditionally marketed in terms of their specific tourist attributes (MacKay and Fesenmaier, 1997). The affective components refer to emotions conveyed by those attributes. Thus destination image affects behaviour and attitude. The cognitive and affective components of Cape Town's image that were rated favourably by international visitors are shown below.

**Cognitive Components**

- Good value for money
- Scenery/Natural attractions
- Weather/climate
- Accommodations/Restaurants
- Friendliness of locals
- Shopping facilities
- Service
- Local cuisine
- Ambience
- Tourist attractions and beaches

**Affective Components**

- Relaxation
- Happy
- Warm
- Peaceful/Calm
- Welcomed
- Pleasant
- Excitement

**Cape Town is chosen based on a complex interactions of both push and pull factors influencing destination choice**

- Destination image promotion should begin with an understanding of the push or pull orientation of potential tourists. Push orientation of tourists referring to the attractiveness of a destination based largely on its projected images. These images are subject to various interpretations by potential visitors. The pull orientation referring to the basic needs and motivations of potential visitors to travel (Chon, 1990; Lubbe, 1998). International visitors did not choose Cape Town solely on its projected image even though scenic beauty is a major pull factor of the destination. A significant number of visitors chose Cape Town because they wanted to visit family and friends. This is clearly a push factor. Thus the destination offering a diversity of experiences cannot be marketed along the lines of push or pull orientation of potential visitors. The same visitor might be influenced to visit through a combination of push and pull factors. This does not mean that the market cannot be segmented along push and pull orientations of customers. This will require an in-depth understanding of the needs and motivations of visitors, which is currently lacking.

## 6.5 DEMOGRAPHIC & TRAVELLING CHARACTERISTICS INFLUENCE DESTINATION CHOICE

- Socio-demographic and travelling characteristics of travellers have a significant impact on image perceptions and travel experience perceptions. The more positive the perceptions of both, the more positive are purchase decisions and the more preferred the destination will tend to be. Repeat visitors have the most positive travel experience perceptions while first-time visitors rely to a greater extent on image for destination choice.

### **Targeting first time-visitors need a different strategy from repeat visitors**

- There is a need for distinct strategies aimed at first-time and repeat visitors. The quantitative research showed that first-time visitors attached more importance to value for money than repeat visitors. Communication campaigns must therefore emphasise value-for-money to potential visitors. Equally important is the fact that, first-time visitors attached more importance to a destination having interesting cultural and historical attractions as opposed to repeat visitors. First-time visitors attached more importance to availability of information, a destination offering plenty of activities to do and appealing local cuisine than repeat visitors. Thus clearly first-time visitors attach more importance to some attributes when choosing a destination, these need to be marketed better to potential visitors.
- Repeat visitors attached more importance to a destination having interesting and friendly people and offering good shopping facilities than first-time visitors did. Repeat visitors have experienced the destination and therefore know exactly what to expect. They are not influenced by some of the attributes that influence first-time visitors such as value for money. Thus, communication campaigns must emphasise a different set of attributes to repeat visitors. In the same way visitors and non-visitors have different brand images of the same destination. It is therefore important to develop separate image and positioning strategies for these two distinct groups to communicate and position the destination favourably.

### **Country-of-origin influences importance given to factors affecting destination choice**

- Country-of-origin of visitors have some influence on their perceptions and expectations as well as attributes that are important to them when choosing a destination. British visitors attach more

importance to value for money than German visitors. British tourists attached more importance to suitable accommodations in their choice of a destination than German tourists. Thus, marketing and communication campaigns must be fine-tuned according to the various countries targeted.

#### **Gender has some influence on importance given to factors affecting destination choice**

- Gender has some influence on destination choice. Males for example, attached more importance to good nightlife and entertainment than females. Females attached more importance to good shopping facilities than males. Males were on average most influenced by word-of-mouth and Internet. Females were most influenced by travel guidebooks and information centres. Thus marketing and communication campaigns must be fine-tuned according to gender.

#### **Age has some influence on importance given to factors affecting destination choice**

- Similarly age influence destination choice. Young respondents attached more importance to a destination offering great beaches and watersports and having good nightlife and entertainment compared to older respondents. Young respondents also attached more importance to a destination offering plenty of activities to do than their older counterparts. Older respondents attached more importance to good service than younger respondents. Architecture is not appealing to younger visitors while older respondents were neutral on average to nightlife and entertainment. Thus the type of marketing and communication campaigns developed for the brand should reflect the age of the target market.

#### **Length of stay affect perceptions of the destination**

- On average the longer respondents stayed in Cape Town, the poorer were their perceptions of the infrastructure, the better were their perceptions of service standards and local cuisine. The longer respondents stayed in South Africa, the better were their perceptions of service standards and local cuisine. Therefore the current destination experience should guide areas of current improvement and future areas of tourism development.

#### **Intermediaries influence image perceptions of international visitors**

- It is not only tourists that hold different images of a tourist destination but intermediaries such as travel agents and tour operators may hold different images of the same place as well. Thus their propensity to

influence potential visitors in a positive or negative way cannot be disregarded. They are a major source of image dissemination. They influence brand expectations and perceptions.

## 6.6 INTERNATIONAL TOURISTS' EXPECTATIONS

### **International tourists have the right expectations in terms of cognitive attributes of the destination**

- Discrepancies between organic and projected images can arise from unrealistic naïve images held by tourists or from a failure on the part of the destination to meet expectations. The qualitative research showed that tourists expect Cape Town to have beautiful scenery (17.6%) and expect safety (14.1%) to be an issue. The empirical research showed that 52.4% of international visitors knew what to expect prior to their visit. Their expectations were that the city is modern and developed. They expected Cape Town to offer a unique experience in terms of variety of things to see and do. Indeed tourists were warned about crime before their visit. They also expected their trip to be informative and a unique cultural experience. International visitors did expect to see poverty and 28.4% of them were expecting a third world country but found first world facilities and amenities.

### **International tourists have wrong expectations on mostly affective attributes of the destination**

- However, tourists also have the wrong expectations as shown by 17.2% of them expecting the city to be wild and underdeveloped, 44.1% being surprised by friendliness of locals, 42.5% finding the city more beautiful than expected, 53.5% finding the atmosphere more laid-back than expected. Therefore future marketing campaigns should aim at creating the right expectations especially with regards to destination attributes such as scenic beauty and friendliness of locals that are considered important in the choice of a destination.

### **Gaps between expectations and reality must be closed to provide a satisfying holiday experience**

- The existence of dichotomies in expectations of tourists must be actively addressed by destination marketing activities. This is important to achieve brand synergy across all tourism sectors. All potential visitors must know exactly what the destination has to offer and the weaknesses of the destination. These set the scene for expectations to be in line with reality. A combination of proactive and reactive communication campaigns must be used to address such dichotomies. Proactive campaigns must be aimed at setting the right expectations in terms of destination experience while reactive campaigns for example, will seek to address negative media coverage on the destination.

## 6.7 PERCEPTIONS OF INTERNATIONAL TOURISTS

### Perceptions of international tourists change for the better during visit

- The qualitative research showed that 68.2% of international visitors mentioned that their perceptions had changed while visiting Cape Town. Interestingly, 18.8% of them said that they found the city much safer than they expected, 10.6% said that the city is more beautiful than they expected, 5.9% said that the locals are friendlier than expected while 7.1% found the city more westernised/cosmopolitan than they thought it would be. The empirical research confirmed those perceptions as international visitors rated Cape Town good on friendliness and excellent on scenery and natural attractions. Value for money, and weather/climate were rated as excellent while entertainment/nightlife, image of destination, architecture/buildings, and infrastructure left respondents feeling neutral. Thus scenic beauty, value for money and friendliness of locals are attributes that must become brand associations of Cape Town. The positioning of the brand must reflect these attributes.

### Cape Town offers little of an African experience

- In terms of negative perceptions, 46% of international visitors agreed that the destination offers very little of an African experience. Definitely, those customers that expect to be on a safari/wildlife trip to Cape Town are either misinformed or have the wrong expectations. The 'cosmopolitan' nature of the city cannot be denied with 64.9% of visitors agreeing that Cape Town is westernised and thus the offering is different to the rest of South Africa. Nevertheless, in aggregate international tourists have better perceptions than expectations. The one attribute where this is more evident is personal safety. Even though tourists expect safety to be a problem, 51.1% of them agreed that the crime situation is not as bad as they thought it would be. This needs to be communicated more consistently and with more vigour to the international community.

### Attractions of Cape Town enhance the appeal of the destination

- Despite some negative comments on the attractions, most international visitors (94.1%) surveyed for the qualitative research agreed that Cape Town's attractions enhance the city's appeal as a destination. They said that the attractions enhance the city's uniqueness and individuality. The empirical research confirmed this finding since attractions were rated as good to excellent on average. However, caution must be exercised when interpreting the word 'attractions'. For international visitors, attractions can be only natural or physical but for industry stakeholders' attractions can also be emotional. The power of

branding lies in conveying unique emotional benefits. Therefore further research needs to be undertaken to qualify what 'attractions' mean for international visitors. But in aggregate, no additional attractions are needed in Cape Town, current ones need to be packaged and marketed better.

#### **International visitors perceive Cape Town to be accessible**

- The qualitative research indicated that 61.2% of international visitors found Cape Town easily accessible in terms of flight and visa requirements. The same attribute was rated good on average for the empirical survey. First time visitors on average had a poorer perception of accessibility than repeat visitors did. This needs to be addressed either through marketing campaigns or intermediaries such as travel agents and tour operators.

#### **Infrastructure and particularly transport is a major weakness of the destination**

- Infrastructure is another weakness of the destination as 45.8% of in-depth interviewees agreed that the quality of transport needs desperate improvement. This finding confirmed by the empirical research given that this attribute was rated neutral to poor on average.

#### **Accommodation is a significant strength of the destination**

- None of the qualitative interviewees had any negative comments about their accommodation. Similarly international visitors rated accommodation as good to excellent on average for the empirical research. Consequently, this is one attribute that exceeds expectations of tourists and rates most favourably against competitors. It needs to be established as a significant brand association of Cape Town.

#### **International visitors perceive ambience of Cape Town to be both laid-back and vibrant**

- The qualitative research indicated that 48.2% of international visitors associate the word 'laid back' with the ambience (way of life) in Cape Town while 25.9% said that the ambience was vibrant. This finding was confirmed by the empirical research given that ambience was rated as good to excellent on average.
- On the whole for destination marketing to be a success, a fusion of marketing mix and destination mix elements is required. However, often this is not the case because marketing mix elements fall under the control of individual suppliers that may not necessarily agree with destination marketing agencies on how to price and market their products. Achievement of consensus based on mutual understanding

rather than power driven decisions can ensure image and message consistency (Horner and Swarbrooke, 1996; Alford, 1998).

### **Service levels are neither good nor bad**

- The qualitative research showed that international visitors had mixed feelings about the service level in Cape Town. While 24.7% described the service level as good, 17.6% described it as better than elsewhere and 15.3% described it as below average. The empirical research however showed that on average international visitors perceived that the service standard to be good. In fact, 95.4% of respondents did not associate the word sub-standard service with Cape Town. Nevertheless, there seems to be a gap in perception that must be addressed to ensure consistency in service delivery.

## **6.8 ATTRIBUTES DIFFERENTIATING CAPE TOWN**

### **Cape Town has a combination of tangible and intangible assets that differentiate it as a destination**

- The extent to which a destination is associated with distinctive or unique characteristics can provide a useful basis for developing competitive positioning and promotion campaigns. The more unique the attributes, the more strength they have in sustaining competitive advantage because it is difficult for competitors to emulate those characteristics (Hu and Ritchie, 1993; Echtner and Ritchie, 1993). By far the variety of things to see and do (12.9%) and scenic beauty (12.9%) were the most favourable qualities of Cape Town followed by the friendliness of locals (11.8%), value for money (9.4%) and good service (3.5%). These were the findings from the qualitative research. International visitors were asked what makes Cape Town unique as a destination. The scenic beauty (23.5%), Table Mountain (22.4%), and friendly people (16.5%) were among the most common responses. Culture is another attribute that differentiates Cape Town given that 72.9% of international visitors described the culture as being unique. The empirical research reported similar findings on the basis that scenic beauty (35.4%), friendliness of locals (26.5%), value for money (19.3%), beaches/mountains (16.2%), culture (10.6%) and variety of things to see and do (10.4%) were reported as being attributes that significantly differentiate the destination. They can be used to build the sustainable competitive advantage of the destination.

### **Table Mountain, scenic beauty and cultural diversity are strongest differentiators of the brand**

- Spontaneous word associations with Cape Town revealed that Table Mountain (47%) followed by sun (29.6%), sea/beach (33.3%), beautiful/lovely (29.9%) were the most common attributes of the destination. Attributes that differentiated the destination were scenery (35.4%), culture (10.6%), friendly people (26.5%) and value for money (19.3%). These were the findings from the empirical research that supported qualitative research findings. The destination has the assets to be successful but not the infrastructure to support those assets. The ongoing fragmentation in the industry is undermining the establishment of clear differentiators of the brand. This leads to the positioning of the brand being unclear and confusing for both international travellers and stakeholders.

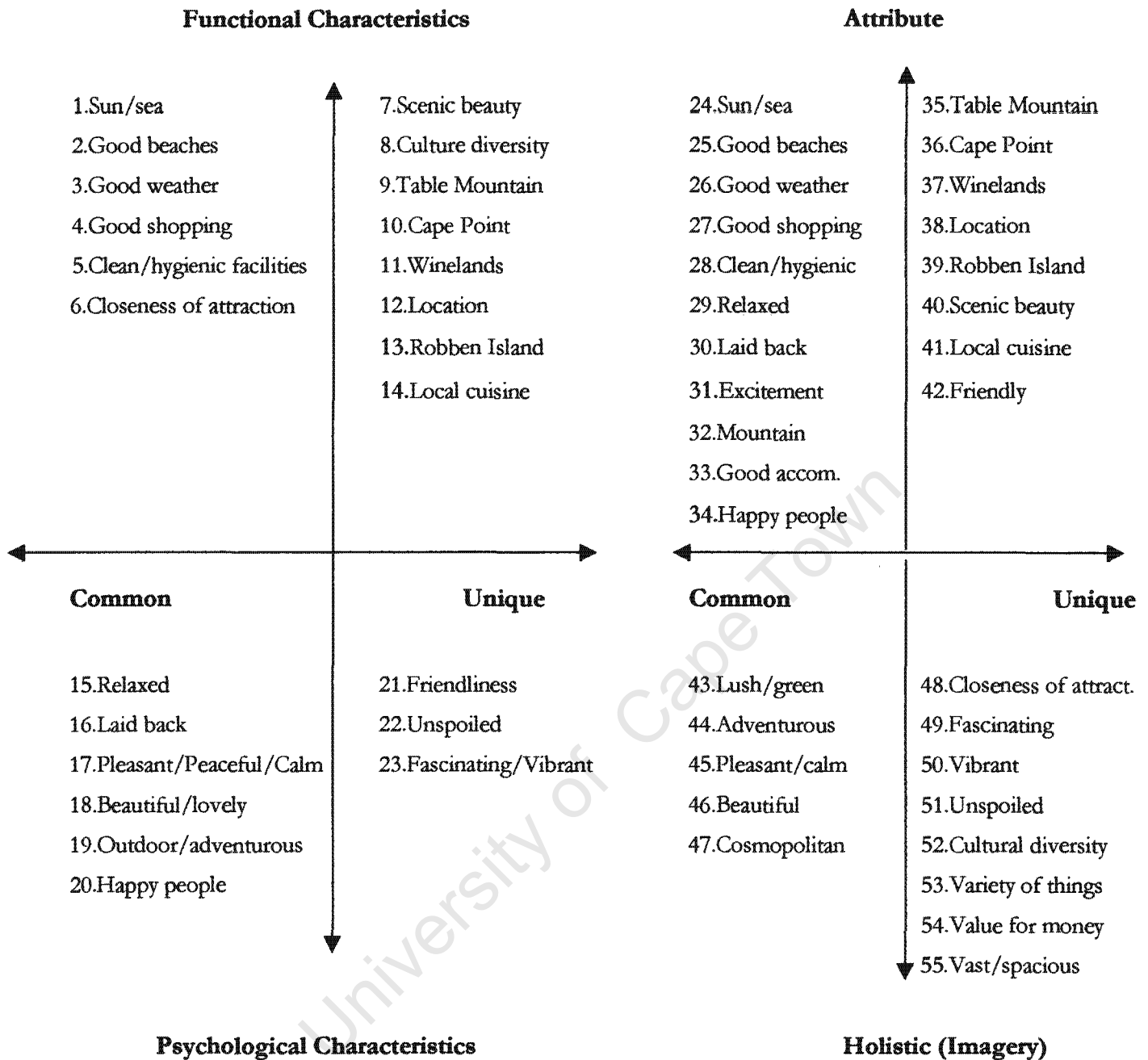
### **There is no consensus among stakeholders with regards to visual images to be used to market the destination**

- At each stage of his visit, the potential tourist may hold different images of a destination, images that are constructed by the amount, source and objectivity of the available information. This range of imagery has been described as a hierarchy of place images, ranging from initial perceptions based on organic sources, to a modified or re-evaluated image upon visiting the destination. This modification results in a much more realistic, objective, differentiated, and complex image (Selby and Morgan, 1996: 288). The diversity of opinions on which images to use to market the country suggest that the Joint Marketing Initiative is far from reaching consensus among industry stakeholders on images to use. The images that international tourists can identify the most with should guide this choice process. The image should be simple and differentiated to avoid customer confusion with other destinations.

### **Echtner and Ritchie's framework of destination image measurement**

- Using Echtner and Ritchie (1993) framework of destination image measurement where the image of a destination must be measured along three continuums namely attribute-holistic, functional-psychological and common-unique. On the attribute side are the numerous perceptions of the individual characteristics of the destination, ranging from functional to psychological. It can be seen from the figure below that Cape Town is perceived to be associated with many functional characteristics and to a lesser extent with psychological characteristics. On the holistic side, the functional impressions of Cape Town consist of imagery of the physical characteristics of the destination, while the psychological impressions can be described as the mood of the place. This ties in with emotional branding as being a





- On one extreme of the continuum, the image of Cape Town is composed of many characteristics that are common (attributes 1 to 6) to other destinations such as sun/sea, good beaches, good weather and accommodation etc. The destination is also rated favourably on commonly considered psychological characteristics (attributes 15 to 20) such as atmosphere and ambience. In this case Cape Town has a very common atmosphere of laid-back and relaxation. It has a common outdoor-adventurous feel. Also, the image of Cape Town includes unique functional characteristics (attributes 7 to 14) such as scenic beauty,

cultural diversity and attractions such as Cape Point and Table Mountain. Psychological characteristics that are unique to the destination (attributes 12 to 23) include friendly people, vibrant atmosphere and unspoiled environment. These are important when developing communication campaigns. These characteristics must be used to position the destination. They provide a clear direction in terms of developing visual images and messages of the destination. The fact that respondents were surveyed in Cape Town meant that these characteristics are detailed and accurate.

- On the other end of the continuum, a destination is also made up of common attributes and holistic elements together with unique attributes and holistic elements. The common attributes are more or less the same as the common characteristics of the destination. The common holistic elements of the image of Cape Town include lush/green environment, cosmopolitan vibe and a pleasant ambience amongst others. Of more interest are the unique attributes and holistic elements. Of course attractions such as Cape point, Table Mountain and Robben Island feature prominently as being unique to the destination. The unique holistic elements such as cultural diversity, variety of things to see and do, closeness of attractions must be communicated to potential visitors.

## **6.9 BRAND ASSOCIATIONS OF CAPE TOWN**

### **Positive brand associations**

- The qualitative research showed that positive brand associations with Cape Town include Table Mountain (44.7%) followed by beaches/sea (30.5%), scenic beauty (16.5%) and wine (14.1%). The empirical research on the other hand showed that 'inexpensive' (70.1%) was the most strongly associated word with Cape Town. The hospitality of Capetonians is another, as it was chosen by 67.5% of respondents as being a word they associated with the destination. Beautiful scenery (74%), relaxed atmosphere (63.8%) and the good service standards (40.7%) were word associations too. These are strengths of the destination that needs to be constantly reinforced to existing target markets and communicated to potential target markets. Yet not all these attributes will sustain competitive advantage, as other destinations might be strongly associated with those words as well. Nevertheless, scenic beauty is the one attribute that differentiates this destination from competitors as it was described as being unique to the destination along with Table Mountain, Cape Point and Robben Island.

### **Negative brand associations**

- The qualitative research findings showed that 61.1% of respondents were warned about negative aspects of the destination compared to 38.9% that were not. Of those who were warned about negative aspects, 23.4% said that it came from friends, 4.7% from locals, 2.3% from hotel staff, 7.1% from travel agents, 3.5% from family, 11.7% from media, 5.9% from SA overseas, 5.9% from other travellers. By far crime is the one factor that respondents were warned about before coming to Cape Town. The safety of tourists at night is another major concern. In-depth interviewees associated the following unfavourable qualities with Cape Town namely, poor transport/infrastructure (11.76%), crime (5.9%) and many poor people (4.7%). The quantitative study confirmed these attributes as being weaknesses of the destination. Of international visitors, 16.2% and 19.7% of them associated unsafe and crime respectively with Cape Town. Poverty (48.6%) is another major weakness followed by many street children (26.7%), as they were significant word-associations with the brand.
- The existence of such a dichotomy in image perceptions of a destination must be actively addressed by destination marketing activities. On the one hand the brand is viewed positively with many unique attributes while on the other crime, poverty and safety create a negative image of the destination. This dichotomy must be eliminated to achieve brand synergy across all tourism sectors. A combination of tangible and intangible assets of the city must be used to address such a dichotomy.

### **Overall image of the destination is positive**

- Of international visitors, 63.5% felt that the overall image of the destination is positive. The overall positive image that respondents have of Cape Town contributes significantly towards positive word-of-mouth, greater likelihood of recommendation and future visits. However, prior to their visit, international visitors do not always have a positive image of many of the attributes of the destination. There must be a coexistence of multiple images to convey an impression of a destination providing a rich experience but not all images should be used at the same time or with the same message. Each niche market must use the images that will most appeal to their target market.

## 6.10 LOGO FOR CAPE TOWN

### **Current logos are ineffective at communicating something meaningful and powerful about the brand**

- The logos used by the various destination-marketing organisations are not well understood by visitors. They are not always associated with what the organisations want them to represent. The difficulty international visitors had in coming up with ideas and images that the logos conjure up in their minds indicate that the logos visual impact and value as branding tools are minimal. The low awareness indicates the ineffectiveness of the logos to communicate something meaningful about the destination. International visitors seem to have a general preference for the Cape logo but it needs some improvement to better represent the diversity of the product offering. There is however no conclusive evidence to suggest whether the logo is appealing or not.

### **Logo must capture diversity of experiences in a unique natural and cultural environment**

- The logo can be something abstract or well defined that captures the beauty of the province while leaving an 'African' feel that is emotive of the unique experience that the destination offers. A good slogan and logo provide a platform from which the image of a destination can be further amplified. For Cape Town, the essence of the logo must be diversity of experiences in a beautiful environment surrounded by warmth and hospitality of people that display a sense of pride for their country. A different way of life in a relaxing atmosphere surrounded by vast open landscapes that have a unique flora and fauna must also be portrayed in the logo or slogan. It is rather difficult to portray all these attributes and elements in a logo but that is why the use of colours, textures, forms and shapes must be chosen carefully to represent the above. Table Mountain should be an integral part of that logo given that it is considered to be unique to the destination. A poorly designed logo and slogan will weakened both expectations and perceptions of the brand.

### **Table Mountain must be used as an icon**

- Of international visitors, 35.3% mentioned that Table Mountain was by far the attraction that was most emphasised to them by sources of information prior to their visit, followed by the beach (22.4%) and wine farms (22.4%). The qualitative research also showed that Table Mountain was the image that 41.2% of international visitors could recall of Cape Town. Yet it is important to realise that 22.4% of them have no distinct image of Cape Town in their mind despite the fact that they mentioned Table

Mountain as being one of the attractions that was emphasised to them by sources of information/recommendation. While 85.8% of international visitors had visited Table Mountain only 57.7% thought it did embody what Cape Town had to offer. The quantitative study confirmed that Table Mountain is a critical element of the destination offering given that it was the strongest word international visitors associated with Cape Town. However, 25.5% of them disagreed that Table Mountain symbolises what Cape Town has to offer compared to 38.1% that agreed. On its own however, this icon is not enough to get tourists to travel to South Africa or Cape Town. It has to be supported by a wide variety of other visual images such as Cape Point and benefits such as value for money to become a credible offering.

### 6.11 CAPE TOWN'S BRAND FINGERPRINT

SIGHTS	SOUNDS
<ul style="list-style-type: none"> <li>• Table Mountain</li> <li>• White beaches</li> <li>• Diversity of people</li> <li>• Sun</li> <li>• Mountains</li> </ul>	<ul style="list-style-type: none"> <li>• Variety of music</li> <li>• Wind blowing</li> <li>• Sea waves</li> <li>• People chatting</li> <li>• Traffic</li> </ul>
FEELINGS	SMELLS
<ul style="list-style-type: none"> <li>• Relaxed</li> <li>• Happy</li> <li>• Warm</li> <li>• Excited</li> <li>• Calm</li> </ul>	<ul style="list-style-type: none"> <li>• Fresh air</li> <li>• Salty ocean</li> <li>• Sea breeze</li> </ul>
TASTE	COLOURS
<ul style="list-style-type: none"> <li>• Fresh fruits</li> <li>• Wine</li> <li>• Biltong</li> <li>• Beer</li> <li>• Seafood</li> <li>• Salty air</li> </ul>	<ul style="list-style-type: none"> <li>• Blue (sea, sky)</li> <li>• Yellow (sun, warmth, people)</li> <li>• Green (nature, flora)</li> <li>• Red (war, past history, nightlife)</li> <li>• White (beach, people)</li> <li>• Black (people, past history)</li> </ul>

- It can be concluded that Cape Town is a well-defined destination in the minds of international tourists during their visit but not necessarily prior to their visit. Future marketing campaigns should communicate images of Table Mountain, warmth of people, feelings of relaxation and excitement,

winelands, blend of different cultures, good weather and beautiful scenery. A logo should incorporate colours such as blue, yellow, green, red, white and black as embodied by the South Africa national flag.

## **6.12 BRAND PERSONALITY OF CAPE TOWN**

### **Cape Town has a different brand personality from South Africa**

- When compared to brand South Africa as a person, brand Cape Town is younger and predominantly white, better educated, earn more money, live a lavish lifestyle and has no children. Brand South Africa on the other hand, is perceived to be older than Cape Town, black, earning a lower income than his/her Cape Town counterpart and having many children while being employed in a blue-collar job. Race, age and what the media portrays about the country largely influenced these brand personalities. They tend to be stereotypical of the image that one would have in his/her mind during the apartheid era. As a result, this shows that respondents cannot be expected to know much about the destination and perhaps the rich history of the country along with the major transformation that has occurred should be emphasised more in communication campaigns.

### **Cape Town must be positioned differently from South Africa**

- The brand personality analysis and brand fingerprint clearly showed that the positioning of Cape Town must be different to that of South Africa. South Africa as a brand can be anchored in tradition, cultural values, birth-place of humanity, and African roots. Cape Town as a brand epitomises youth, excitement, adventure, lavish lifestyle, wealth, and achievement. These are two completely different destination experiences that reflect the two different images that tourists hold in their minds. The marketing of the two brands must convey the essence of this difference. However, there needs to be some synergy between the two. Cape Town is perceived to be an 'exclusive' destination for the rich by international visitors. It has nothing to do with wildlife because of its cosmopolitan feel and therefore cannot be promoted along the lines of the 'big five'. The one attribute that both brands have in common is scenic beauty and could potentially be used to link the two brands in visitors' minds.
- International visitors provided a positive description of the brand personality. Thus the brand personality needs minor adjustments and mostly fine-tuning to reinforce the positioning of the brand. The power of positioning lies in its ability to convey how a destination brand will satisfy the needs of

potential visitors better than competitor brands. It should involve developing and communicating key product and service attributes that are consistent with the brand image.

#### **Leveraging secondary associations with brand South Africa will strengthen brand Cape Town**

- Secondary brand associations are particularly important for destination brands. This is because a destination exists within a local, national and international context. Both positive and negative brand associations with a supra-brand are likely to be transferred to the sub-brands. Therefore the sub-brands can only be as successful as the supra-brand. The desired brand associations with South Africa will influence how brand Cape Town is perceived. Favourable brand associations with South Africa such as wildlife and safaris/game parks must not create expectations that Cape Town offers a similar product. Therefore it is critical that communication campaigns emphasise this difference. Yet brand Cape Town can benefit from brand associations with South Africa such as Nelson Mandela, history/apartheid, and cultural diversity.

### **6.13 CAPE TOWN VS. OTHER CITIES IN SOUTH AFRICA**

#### **Cape Town offers a better tourism experience than any other cities in South Africa**

- The qualitative research found that international visitors more or less thought that Cape Town is very different from any other regions in South Africa. The only similarity was in terms of perceptions of poverty. The empirical research showed that accommodation in Cape Town is perceived to be similar to other places, while attractions, variety of activities and safety of other cities are considered worse than Cape Town. Despite Cape Town being the most recognised brand among international travellers, the lack of meaningful positive associations thereof with brand South Africa is likely to hurt brand Cape Town in the long-term through conflicting image and message projection.

### **6.14 ATTITUDE OF TOURISTS TOWARDS BRAND CT**

#### **International tourists have a positive attitude and display positive future behaviour toward the brand**

- Of international visitors surveyed for the qualitative research, 83.1% said they would like to come back to Cape Town. The empirical research found that 54.8% of international visitors are very likely to revisit

Cape Town. The longer respondents stayed, the more likely they were to revisit. The longer respondents stayed in South Africa, the higher was their likelihood of coming back to Cape Town.

- International visitors strongly agreed (59.1%) to agreed (38.3%) that they would definitely say positive things about the city to friends, relatives and colleagues. This is much-needed positive word-of-mouth about the destination. Repeat visitors were more likely to recommend the destination than first-time visitors. The longer respondents stayed in Cape Town, the more likely they were to recommend it to others. In terms of satisfaction levels with the destination experience, most respondents were either very satisfied (61.1%) or extremely satisfied (33.2%). These findings confirmed that international visitors have a very favourable attitude towards brand Cape Town.

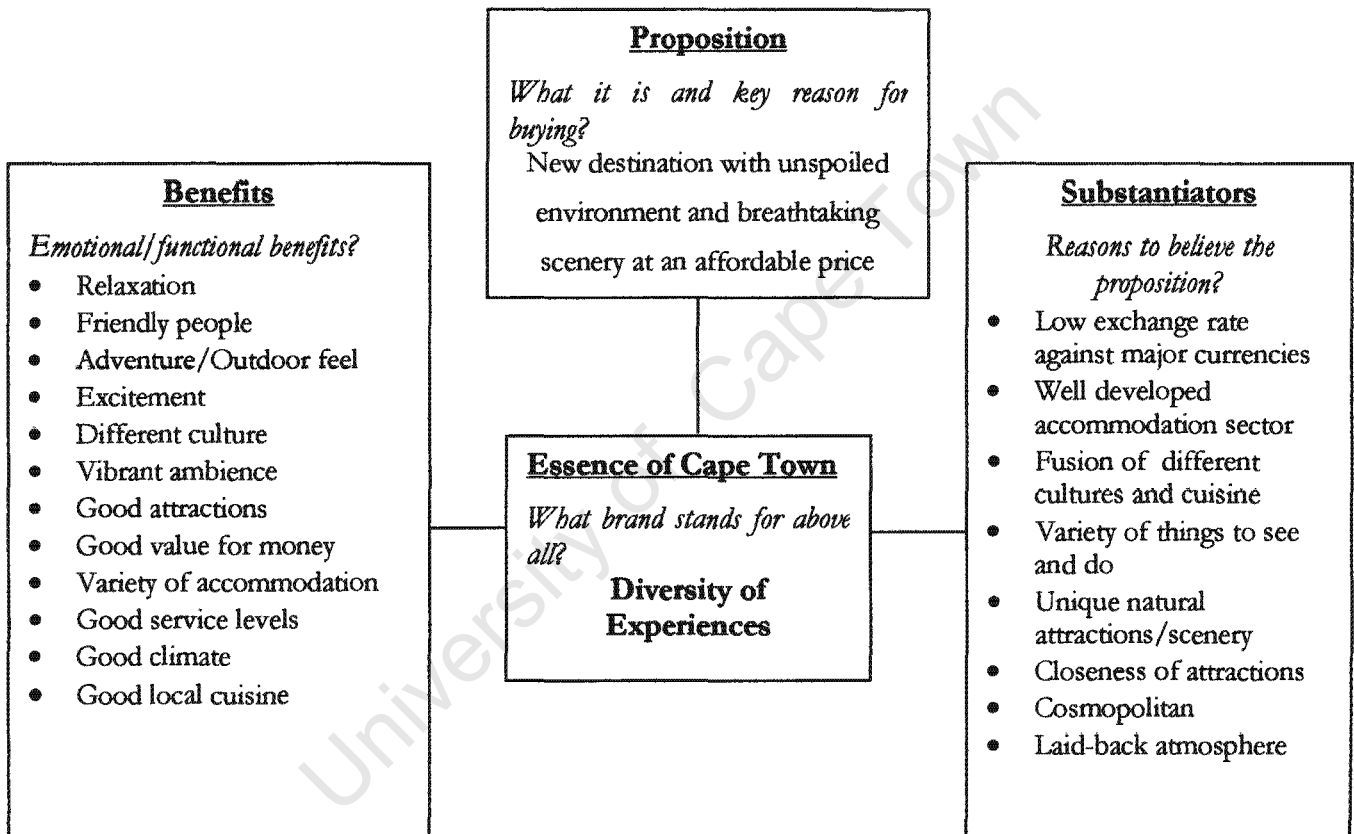
## **6.15 POSITIONING CAPE TOWN USING THE BULLSEYE MODEL**

- The most important aspect of a brand is its single-mindedness. Therefore there must be branding synergy between the destination brand and individual suppliers' brands to create a powerful image of the destination. The first stage in building a destination brand is to establish the brand's core values that should be durable, relevant, communicable, and hold saliency for potential tourists. Once these core values have been established, they should underpin and imbue all subsequent marketing activity so that the brand values are cohesively communicated. The brand values should also be reinforced by brand elements, which ensure consistency of message and approach (Morgan and Pritchard, 2000: 281).
- The future of Cape Town is perceived to be optimistic but it is up to marketers of the city to convince international tourists that the city offers an experience on par or better than competitors. This can only be done through aggressive marketing and promotion campaigns in each targeted country to put the destination on the world map and positioning the destination correctly for each segment of the market. The product offering rates favourably against those of Sydney, Thailand, San Francisco, and Paris. The destination is fast becoming a favourite and its world-class destination status will soon be recognised.

**BRAND VALUES**

***Beliefs and guiding principles***

- Brand can be positioned to be perceived as the premier leisure tourism destination in Africa.
- The city offers an exceptional variety of unique, world-class natural tourist attractions and a spectrum of high quality cultural and man made ones.
- The product rates among the best-known leisure tourism destination in Southern Africa.
- Cape Town offers good value for money compared to other destinations.
- Major opportunities exist for expansion and growth in existing markets and new markets.
- Brand Cape Town is different from other sub-brands and brand South Africa.
- Customers are very satisfied with the destination experience and have a favorable attitude towards the brand
- Perceptions of the brand are very positive in most cases.



**BRAND PERSONALITY**

***Human characteristics – setting tone & feel of the brand***

- |                 |             |             |               |
|-----------------|-------------|-------------|---------------|
| • Young         | Dynamic     | Ambitious   | Sophisticated |
| • Trendy        | Adventurous | Open-minded | Modern        |
| • Well educated | Independent | Care-free   | Sexy          |
| • Wealthy       | Smart       | Relaxed     | Vibrant       |
| • Good Looking  | Confident   | Happy       | Excitement    |

The diagram above is an application of the brand positioning Bullseye model to Cape Town

- The model shows that the timeless essence of the brand is at the core of brand positioning. Brand benefits, propositions and substantiators support the brand essence. These determine the brand values and personality. The brand essence of Cape Town is the diversity of experiences provided within a scenically beautiful and unspoiled environment. The brand offers significant emotional and functional benefits. The most significant of which are feeling of relaxation and good value for money supported by a laid-back atmosphere and low exchange rate against major currencies respectively. The benefits, propositions and substantiators determine the brand values, the most important for Cape Town being the opportunity to uniquely position this city as a premier African tourism and leisure destination. The brand personality clearly shows that the brand is still young and the way it is positioned now will influence how it is perceived in the next few years. The correct positioning now will increase the brand's appeal and attractiveness that can lead to future positive behaviour toward the brand.

## **6.16 AUTHOR'S PROPOSED MODEL OF DESTINATION IMAGE FORMATION AND CHOICE**

- The author's proposed model of destination image formation and choice showed that pull and push factors, organic images and projected images affect the formation of the primary image of a destination such as Cape Town. The pull factors as described by Chon (1990) are the attractiveness of a region and its various elements. These elements fall into three basic categories namely: static factors, dynamic factors and current decision factors. Static factors include the natural and cultivated landscape, the climate, means of travel to the region and in the region, and historical and local cultural attractions. Dynamic factors include accommodation, catering, personal attention and service, entertainment and sport, access to the market, political, conditions and trends in tourism. Current decision factors include the marketing of the region and prices in the region of destination as well as in the country of origin (Lubbe, 1998: 24). The empirical research showed that Cape Town rates favourably on static factors except for infrastructure and accessibility that influence means of travel to and within the region. Dynamic factors rate favourably in general with accommodation being viewed in a very positive light. The marketing of the region, which is a current decision factor, is not at its best but the destination offers very good value for money.

- The push factors on the other hand, are the needs and motives of consumers for travelling. Push factors are considered as socio-psychological variables that predispose an individual to travel in general, and the intangible or intrinsic desires of the individual (Baloglu and Üysal, 1996; Lubbe, 1998). Among these factors, the literature emphasises motivation, preferences, objectives and perception. Chon (1990) suggests that Maslow's hierarchy of needs is the foundation for travel motivations. Visiting family and friends-the need to be among loved ones-is an important push factor for Cape Town. The need to experience something new and different is another push factor. The organic image of Cape Town is not always positive given that a significant number of international visitors have the wrong expectations and media do not always paint a positive picture of the destination. These might lead to the rejection of the destination as a potential holiday base in the earliest stage of the consumer destination choice process. Thus there is an urgent need to improve the organic image of Cape Town among international travellers.
- For those visitors that were surveyed for both the qualitative and quantitative research, their primary image of the destination is positive. There is congruity between the primary image and the tourist's self-image, which leads to Cape Town being chosen as a holiday base. Cape Town satisfies the need for novelty, as it is a relatively 'new' destination, it satisfies the need for challenge as it offers adventure and outdoor activities, it satisfies the need for relaxation through its laid-back atmosphere and calm/peaceful surrounding and scenic beauty. Finally it satisfies the need for learning as the destination has a rich history and a diverse culture. Cape Town rates rather favourably on travelability factors as it offers value for money but some discomfort is felt with regards to the lengthy travelling time to get to the destination. The destination primarily attracts visitors that rely on social group opinions given that a significant number of international visitors mentioned that word-of-mouth from family and friends influenced their choice of Cape Town as a holiday destination. Thus the model shows that Cape Town rates favourably on most factors influencing destination choice. The high likeness of revisit and recommendation to others, positive word-of-mouth dissemination, and high satisfaction levels show that the actual image matches the primary image of the destination in most cases, which leads to the formation of the complex image of Cape Town. International visitors therefore have a favourable attitude toward the brand as expressed by their positive brand behaviour.

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# CHAPTER 7

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## RECOMMENDATIONS

## 7. RECOMMENDATIONS

Based on the above conclusions, the following recommendations are made to Cape Metropolitan Tourism and other destination marketing organisations.

### 7.1 DESTINATION MARKETING

#### **Practice tourism segmentation and target market management**

- Achieving consistency in marketing requires an understanding of the target market. Destination marketing organisations such as Western Cape Tourism Board and Cape Metropolitan Tourism must practice tourism segmentation and target market management. They must use both demographics and psychographics to profile market segments. They must distinguish between 'maintenance markets' and 'growth markets'. Segmentation of target markets on the basis of demographic/travelling characteristics is necessary because factors such as age, gender, country of origin, length of stay and purpose of visit influence destination choice, expectations and perceptions.
- Visitors can also be segmented on the basis of needs or the importance they attach to particular factors that influence their choice of a destination. This will improve the effectiveness of marketing activities and ensure that the right features of a destination are being emphasised to the right segments of the market. For example, international visitors can be segmented along nature-based activities that require a different set of strategies as opposed to visitors that are attending a conference.

#### **Develop profiles of visitors to fine-tune marketing and communication campaigns**

- Commission tourism market research and visitor satisfaction studies on a regular basis. Develop profiles of destination vacationers of certain type salient to the province and city. Use visitor information centre records and data from the accommodation industry to get a better understanding of demographic and psychographic profiles of visitors. These will help fine-tune future marketing and communication campaigns. It will also facilitate the use of direct marketing.

#### **Brand awareness must be created**

- It is high time to market the city more aggressively and to market the diversity of offerings. The industry must become more proactive and consistent in letting the world know 'who we are, where we are and

what we have'. In essence creating the necessary brand awareness and brand recognition. There are tremendous opportunities that can be tapped into with the brand but not necessarily achievable in the short term due to notable weaknesses such as infrastructure development, crime problem etc. There is no point in repositioning the brand if such problems are not addressed as visitors will get here and realise that their expectations are not met. This will affect repeat visits and spread bad word-of-mouth about the destination.

- Brand awareness can also be created through the use of the supply chain, that is tour operators and travel agents. Providing the right incentives to these critical partners will ensure that the brand has the desired exposure. However, incentives by themselves are insufficient. They need to be supported with a product offering that is uniquely packaged, competitive airfares, good pricing strategies that take into account currency fluctuations, and good information provision from local and regional tourism boards.
- An institutional or umbrella marketing program is needed at the provincial or country level that provides a framework within which the individual (local) destinations and attractions can feature their own brand. The overall goal being consistency in message and image projection. South Africa needs to be established in the long-term as the supra-brand while provincial and city brands must feature as sub-brands.

### **Transform Cape Town into a power brand**

- Transforming Cape Town into a power brand requires first of all co-operation between the private and public sector to support government tourism policies, procedures and practices, with government playing a leadership role. Tourism planning is critical for the success of Cape Town. Clearly co-ordinated and focused strategies on each target market will ensure that needs of potential visitors are understood. These can then translate into future tourism policies and developments in the destination. Integrating quality of life objectives with tourism development is a winning formula for any destination.
- Accountability is key to make tourism planning easier and to establish a clear image of the destination. The supra-brand and sub-brands must be clearly defined while organisations marketing the former and latter must be accountable for their actions. All stakeholders must pool resources together for a destination to be successful. Local residents must be an integral part of the development process. A

flexible framework that guides tourism development and allows for constant information dissemination about the process and feedback on achievements needs to be implemented

- Distinguish between 'mature' and 'growth' local destinations and between primary and secondary zones of tourism development. This will maximise revenue earned from tourism facilities/amenities and channel expenditure on tourism development in a more efficient way. Do not force a branding system on individual players. Such a top-down approach will be seen as restrictive and bureaucratic. Instead it is important to offer data to support the positive effects of branding, and provide guidelines and resources instead of rules and regulations.

### **Marketing plans must be constantly re-evaluated**

- Develop and follow two-to-four year rolling marketing plans, supplemented by short-term plans with specific measurable goals, objectives, strategies, and supported by a good information system. Set measurable objectives and develop and use performance standards of effectiveness at all levels of the marketing plan and subsidiary programs. Do not make changes to marketing programs too quickly. It takes years to establish a brand image, brand name recognition and develop strong awareness of the destination or product. Continually evaluate, monitor and adjust campaigns to reflect changing market tastes and focus on monitoring changes in expectations and perceptions.
- Continually monitor changes in factors influencing destination choice. Adjust marketing programs to emphasise factors that are particularly important to international travellers at a specific point in time. In winter, for example, markets such as Europe and US attach more importance to a destination offering good climate/weather. Consequently image and message dissemination must emphasise on such a factor.

### **Brand South Africa must be repositioned**

- Brand South Africa must become a platform of which other sub-brands can be superimposed to create a unique city or province identity while still retaining a degree of individuality. Each other province or city then becomes a regional or city brand ensuring consistency with the umbrella brand. Each regional or city brand having its own positioning, image, target markets, competitive strengths, marketing mix, product development and tourism strategies.

- In the short-term brand Cape Town should be the supra-brand as it has the most positive connotations in the minds of international travellers. It has a higher level of awareness than brand South Africa. Brand South Africa can draw on this awareness to build itself a reputation. Synergy can be achieved through the use of scenic beauty and culture as the link between the two brands.

#### **Educate residents and stakeholders on the importance of tourism**

- Expand/improve programs designed to educate local residents about the visitor industry and develop an understanding of the industry's positive impact on the province. Stress employment opportunities. Locally stakeholders must be educated on the purpose of the existence of brand Cape Town and brand 'The Cape'. There needs to be more clarity with regards to the functions of each brand and how they will improve the competitiveness of the province.
- Educational outreach seminars need to be established in order to augment the marketing and customer relation skills of small players and previously disadvantaged players. This will create the much-needed consistency in marketing and communication. An annual or biannual tourism conference must be promoted to encourage networking and information/technical assistance exchange for industry members. Promulgate a city tourism-oriented newspaper or newsletter targeted at stakeholders in the industry as an information exchange vehicle.

## **7.2 IMPROVING INFORMATION AVAILABILITY**

#### **Information search behaviour can be used as a segmentation tool**

- Information search behaviour can be used as a segmentation tool. Consumers place varied level of importance on sources of information that are more likely to influence their decision to visit a particular place. Therefore communication strategies must be focused on the sources most frequently used by the targeted consumers.

#### **A differentiated Internet presence is critical for the success of the brand**

- A web presence is not enough to entice consumers to choose a destination as a potential holiday base. Synergy is required between both on-line and off-line information sources to project a consistent message and image. A web presence provides a unique opportunity to tailor information to customer needs and pull together the information provided by various suppliers under one website. This is a

potential source of differentiation for a destination as it makes it easier for potential visitors to look for information. Almost like word-of-mouth, the Internet provides the power of one-on-one communication, but through a mass medium. Internet communication is more credible as it is deeply personal, in that the Internet user 'pulls' information at his/her own discretion.

- Develop interactive video displays for tourist information centres and major airports. Develop a multi-agency brochure to inform travellers of the specific functions of each tourism/traveller related agency to enable the tourist to contact the proper needed agency. Also a sense of place and product are best communicated by using pictures and few words. Greater use must be made of available digital satellite and internet technology to distribute quality images into the computers of picture editors, input editors and news editors in travel/tourism related publications and online newsrooms throughout the world. This, coupled with the placement of expertly written editorials by well-respected individuals, will supply hungry tourism-oriented publications with material that will communicate the destination's unique sense of place and associated product to a global audience.
- Improve media exposure- electronic and print media must be monitored to assess the extent to which positive and negative articles about the city are being printed and have a media leverage strategy to emphasise the positive articles to the international community while addressing the negative ones. Build up database of complaints and compliments on the brand. This can be used as part of an advertising or public relations campaign to create a positive image of the brand.

## **7.3 BUILDING THE BRAND EQUITY OF CAPE TOWN**

### **Reduce confusion about the brand among stakeholders and visitors**

- The basic premise of brand equity is that the power of a brand lies in the minds of consumers and what they have experienced and learned about the brand overtime (Keller, 1998: 594). At present Cape Town can probably best be described as a confusing tourism destination as it does not appear to have a single focused image or reputation as to what its primary attraction is to both the domestic and foreign tourist markets. This can probably be attributed to the transitional phase that it finds itself emerging from and is therefore not suggested as being the fault of any institution, but rather as a result of its circumstances. At present it appears to be marketing itself as offering everything to everyone, which is resulting in other more focused competitive destinations gaining market share of the available tourist-source markets.

- It is recommended that Cape Town needs to consider spatial sub-groupings of mini-destinations that link certain hotel groupings with exclusive beach areas, which can then develop their own market image, which can then be marketed to targeted tourist-source markets. An example in this regard, cluster the hotels along the Sea point drive. Allocate the beach, or a part of, for the use of hotel guests and other visitors willing to pay for the use of the facilities.

### **Sources of brand equity**

Brand equity occurs when the consumer has a high level of awareness and familiarity with the brand and holds some strong, favourable and unique brand associations in memory. Currently brand Cape Town has low to high awareness depending on the target market. New markets must be tapped into to promote brand growth.

#### **Brand Awareness of Cape Town**

- Currently low to high depending on the target market

**Depth of brand awareness** is determined by the ease of brand recognition and recall – cannot be measured in the case of brand Cape Town. This requires a study among international travellers that are still at the early stages of the destination choice process

**Breadth of brand awareness** is determined by the number of purchase situations from which the brand comes to mind. This cannot be ascertained from this research. It requires presenting international travellers with different purchase decisions and measure whether they associate brand Cape Town with adventure, culture, eco-tourism etc. However, the possibility exists that the brand can be linked with different purchase situations given the diversity of products offered. Also this research revealed that words such as adventure and culture are associated with the brand.

#### **Strong Brand Associations**

Marketing programs that convey relevant information to consumers in a consistent fashion at any one point in time as well as overtime, create strong brand associations. Despite Cape Town lacking consistency in marketing associations such as value for money, scenic beauty, variety of things to see and do, cultural diversity have become strong brand associations. Therefore the equity of the brand lies in the image of the destination being associated with scenic beauty, variety of products, cultural diversity and value-for-money.

#### **Favourable Brand Associations**

Favourable brand associations are created when marketing programs effectively deliver tangible and emotional benefits that are desired by consumers. Brand Cape Town offers many tangible benefits such as diversity of experiences, value for money, suitable accommodation and emotional benefits such as relaxation, peaceful environment, and vibrant atmosphere. These benefits constitute part of the brand equity of Cape Town. They must be managed efficiently overtime to maintain the competitiveness of the destination.

#### **Unique Brand Associations**

Unique brand associations that are also strong and favourable create points of difference that distinguish the brand from other brands. Scenic beauty and culture differentiates the brand. Brand associations that are not unique, however, can create valuable points of parity to neutralise competitive points of difference. Brand Cape Town offers value for money, suitable accommodation, and good climate that can help in establishing points of parity with other competing destinations.

#### **Outcomes of Brand Equity**

- Greater loyalty towards the brand
- Less vulnerability to competitive marketing actions
- Less vulnerability to marketing crises
- Greater intermediary cooperation and support
- Increased marketing communication effectiveness
- Additional brand extension opportunities (Keller, 1998)

## **7.4 BUILDING BRAND IMAGE OF CAPE TOWN**

### **Use visual imagery and emotional branding tools to enrich the brand image**

- The JMI must work closely with all key government agencies to market and manage brand Cape Town's image and philosophy to its audiences. Brand Cape Town can be integrated into projects with a broad community focus such as brand Cape Town vehicle number plates, vehicle registration stickers,

welcome signage at city entry points, and brand Cape Town 'welcome statements' on the rear windscreens of taxi cabs. These will reinforce the image of the destination in tourists' minds and create the desired awareness of the new logo/slogan for Cape Town. Similarly, a brand Cape Town merchandise range incorporating clothing and souvenirs can be marketed to reinforce the brand and create awareness of the brand. Have city logo label pins available for tourists free of charge.

- Destination marketers for Cape Town must be in the business of delivering impact experiences, not merely constructing a clever brand identity on paper with slick slogans and brand logos. Brand winners are those places rich in emotional meaning, which have great conversational value and high anticipation for tourists. The destination's identified strengths are the starting point to build the brand. Tourism boards must find ways to integrate the well known with newer concepts. In Cape Town's case for example, weaving culture and friendliness into the familiar image of the city's natural beauty. If the city/province is not perceived as providing a particular type of activity (adventure based, water-based etc.) but in fact has substantial resources of this kind, develop a special promotional campaign to increase awareness and change image/perception.

#### **Overtime the brand needs to be visually and emotionally complex**

- As consumers become more familiar with brand Cape Town, they will seek more detailed knowledge. As the brand develops a presence and position in its target markets, it therefore needs to continually extend itself to build on its core personality. Consequently it needs to become more complex and multi-layered to maintain its consumer appeal. This can be achieved through rich visual imagery and making use of emotional branding tools. Cape Town must at all costs avoid presenting visitors with a 'shopping list' of attributes. The brand must be built on emotional values.
- Emotional and physical values must convey a sense of place to visitors. A picture of Table Mountain for example evokes a certain response but is not enough to get potential travellers to choose the destination. The same pictures coupled with hiking trails, cosy hotels nestling in the foothills, vibrant nightlife, and smiling children create a 'sense of place'. This sense of place is bound in with the product and creates an emotional attachment thereby clarifying the image of the destination in the visitors' mind. This is the true source of competitive advantage overtime.

### **Reinforcing image using brand elements**

- Brand elements are an integral part of building a destination brand. The new logo for Cape Town must be designed to reflect colours such as blue, yellow, green, red, white and black. It is then the responsibility of destination marketing organisations, through their marketing campaigns, to associate the desired words with those colours. Words such as excitement and relaxation can be conveyed through colours such as red for the former and blue for the latter. The colour of a logo influences the attitude of a potential visitor towards a destination. A colourful logo, for example, can evoke images of fun, diversity, excitement, and happiness. These are words that will strengthen a destination brand. Colours are significant in determining the emotional aspects that a brand conjures in the mind of a potential visitor. Thus colours used for Cape Town logo must be in line with feelings and emotions that the destination is trying to convey to potential visitors.
- Slogans are useful in conveying both the physical and emotional aspects of the destination. Slogans coupled with specially developed music and lyrics to use in promotional jingle to portray the experience awaiting the tourist in Cape Town, can be a winning formula. Whatever proposition is used it must also have the potential to last, to grow and to evolve in a long-term branding campaign, so it is essential to get it right. Some suggestions for slogans are as follows:

Land of plenty, city of beauty-Cape Town

Treat your soul-Cape Town

Escape to the Cape-City of diversity

The Cape of pleasure and leisure

### **Maximise on cross-selling opportunities**

- Create and promote unique destination products to offer to the tourism market. Build or package facilities and features, for example combine Garden Route with other tours outside of the city. Aggressively promote cross selling of one region of the province with another for example the West Coast with the Garden Route and vice-versa. Encourage different co-operating attractions such as Table Mountain and Kirstenbosch Gardens to offer discounts for subsequent attendance at another attractions in the package.

**Brand personality must be developed**

- A brand ownership campaign must be launched where approved licensees are able to use the visual elements of brand Cape Town in their own marketing and promotional efforts, thus supporting the brand identity. Stakeholders can then mix and match brand elements -logo/slogan- by choosing which different brand elements will achieve different objectives but ensuring brand elements are mutually reinforcing as possible so as not to dilute brand image and personality.
- Developing a brand personality for Cape Town will require more than superficially constructing traits such as 'friendly', 'cultural', and 'scenic'. These are popular descriptors for too many destination brands. A brand personality has both a head and a heart- its head referring to the logical brand features, while the heart referring to its emotional benefits. For Cape Town, the brand personality could reflect traits such as youthful, refreshing, vibrant, stylish, adventurous, diverse, optimistic and fun. It should encapsulate the spirit of the brand.
- The new logo for the brand must use colours such as blue to depict the sea, yellow to depict year-round sunshine, green to depict the scenery, red to reflect the history of the country and so on. These colours will communicate the brand architecture making the brand look bold, exciting, energetic, sophisticated and yet fun. However brand architecture goes beyond brand personality, it includes also the positioning of the brand, its rational and emotional benefits along with brand differentiators. It is the blue print that should guide brand building, development and marketing.
- Leverage secondary associations to compensate for other wise missing dimensions of the marketing program by linking the brand to other entities that reinforce and augment the brand image. For example, the Garden Route and Cango Caves are part of the 'Cape' brand as opposed to the Cape Town brand. Thus leveraging those attributes along with the attractions of Cape Town will create a better sense of place for the international traveller. These secondary associations will help to create a richer and differentiated brand.

## 7.5 MEDIA/COMMUNICATION STRATEGY

### Media management is crucial for brand success

- Essentially it comes down to managing the county's reputation through the media to ensure a positive portrayal of the city brand and the country as a whole. Reputation management is an emerging discipline whose central tenet is that strong reputations result from initiatives and messages that are in tune with the distinctive values and personalities of a country. In today's world, where ideas are increasingly displacing the physical in the production of economic value, competition for reputation becomes a significant driving force, propelling an economy forward. Cape Town has a reputation, which has suffered at the hands of a variety of largely uncontrollable internal and external factors, like crime, grime, violence, HIV/Aids, and tardy infrastructure. This reputation needs to be clarified and changed positively wherever possible. This can be done by:

**Distinctiveness:** a strong reputation will result when Cape Town owns a distinctive position/image in the minds of its public.

**Focus:** a strong reputation will result when tourism stakeholders focus their attention and communication around a single core theme.

**Consistency:** a strong reputation will result when destination-marketing agencies are consistent in their marketing activities and communications to all their public.

**Identity:** a strong reputation will result when the various tourism boards and partners act in ways that are consistent with established principles of identity.

**Transparency:** strong reputations are built when organisations are transparent in the way they conduct their affairs.

- Mix marketing communications options by choosing a broad set of communication options based on their differential ability to impact on brand awareness and create, maintain, or strengthen favourable and unique brand associations. Match marketing communication options ensuring consistency and directly reinforcing some communication options with other communications options. Utilise a reach media strategy for new markets and a frequency media strategy for maintenance or key markets

**Use events as a platform to build awareness and recognition of the brand**

- Develop and promote a unique holiday festival/event of Cape Town worthy for national media coverage. Do its promotion in major international cities. Promote city and province as a location for filming movie and television projects/series. Specifically address the foreign travel writer market. Produce documentary films designed to highlight specific elements of the city/province's heritage, museum, community etc. These will create a positive perception of the brand.

**Use below the line advertising, as they are less costly**

- Publish general brochures about Cape Town in the major relevant foreign languages. Use billboards both within the province and outside the province to encourage travel in the province. Use both broadcast and print media to reinforce each other in key feeder markets such as UK, Germany and Netherlands to create and maintain awareness of the destination. Align outdoor materials with audiovisual materials, audiotapes, souvenirs and promotional gift-items. Target high visibility 'leader' market segments such as celebrities and sports figures, which may positively affect 'emulator segments' and often attract free media coverage. Have separate media campaigns for international visitors, domestic visitors and travel agents/tour operators.
- Develop media campaigns to address negative brand associations such as lack of safety and crime. Disseminate facts and figures on crime levels and stress on positive experience of visitors. International community needs to be cautioned on safety but do not overemphasise on negative aspects of the destination. Communicate visitor research results that shows that crime and safety are not as bad as 'people' tend to think it is. However, communication campaigns to overcome negative perceptions of crime and violence could also be counter-productive by alerting audiences to potential dangers that they did not know about previously.

## **7.6 MANAGING BRAND CAPE TOWN OVERTIME**

Managing brand Cape Town overtime requires the use of a brand assessment tool such as the one below to fine-tune marketing and communication campaigns. This tool will help destination marketing organisations to constantly re-evaluate the effectiveness of campaigns and make timely changes and adjustments.

## **Brand Assessment Tool**

### **1. Clearly define the position you want the brand to occupy**

- Develop a brand positioning statement - explain what you want visitors to think when they think of your brand. Destination marketing organisations must be able to clearly define this position, otherwise it is unlikely that the targeted visitor will consistently understand the brand's strengths.
- The brand positioning statement is critical because it focuses promotional and marketing efforts. It becomes the consistent message that is communicated over and over to the target markets. It is an internal benchmark against which all communications to the targeted audiences are measured.
- Is the brand position simple and understandable to consumers?

### **2. Is the brand differentiated in the marketplace?**

- Do consumers place value on the differentiation? Is it important and relevant to consumers? The differentiation gives the brand an advantage only if it is valued.

### **3. Is the brand position defensible?**

- If the position can be easily and credibly duplicated, it is not defensible. The value of the differentiation will be short-lived.

### **4. Has enough resources been allocated to support the brand and brand-building activities?**

- Have the resources been efficiently used?

### **5. Does the brand reflect the destination's strengths?**

- How can the brand sustain its competitive advantage?

### **6. Have marketing and promotional messages been consistent over the last few years?**

- Are the messages we communicate consistent with the desired brand position?

### **7. How do we measure the effectiveness of marketing, promotion, public relations and other brand-building activities relative to the desired brand positioning?**

- What kind of performance standards and evaluations must be set in place?

## **7.7 AREAS OF FUTURE RESEARCH**

This study focused on the perceptions of brand Cape Town among international tourists visiting the destination. International tourists are not the only target markets for such a brand. Similar studies must be carried to measure perceptions of domestic tourists and stakeholders. Looking at brand Cape Town from a 360 degrees angle requires an understanding of how domestic tourists and stakeholders perceive the brand as well. Though the positioning of the brand will be different for the domestic market, consistency in image and message communication is still necessary to avoid consumer confusion.

It is also necessary to conduct research among international and domestic travellers that are not considering Cape Town as a potential holiday base. This will help to identify negative organic images that exist among the international community about the destination. The opinions of those that are not buying into the brand experience are critical to formulate growth strategies for any brand. The findings for this particular research cannot be used to extrapolate that crime and safety are not affecting the image of the brand. Obviously those respondents that were surveyed at the destination have a different view on safety and crime levels compared to international travellers that are not even considering the destinations as a holiday option.

The perceptions of intermediaries are even more critical for the success of a brand. Brand awareness and brand image influence strategies of distribution channel management, particularly push and pull strategies within the channel. Consequently, it is necessary to conduct research to find out perceptions of the brand among local and international channel members (tour operators/travel agencies). Intermediaries to a large extent influence brand choice and brand expectations. Therefore if they hold a negative image of the destination, they will be most unlikely to recommend the destination to their customers.

Moreover, integration of on-line and off-line branding tactics is necessary to achieve consistency in image and message projection. Given that brand Cape Town is adopting an on-line marketing strategy requires research to be undertaken among domestic and international tourists alike to measure whether how the brand is perceived off-line is the same as it is perceived on-line. Any discrepancies must be addressed to avoid customer confusion.

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# APPENDIX A

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# APPENDIX 2

Impacts	Analysis	Introduction	Growth	Maturity	Saturation	Decline
<b>SITUATION</b>		New trendy destination	More people interested investment on accommodation & facilities	Maximum visitation increasing facilities	Oversupply, Original demand moves	Reduction of demand Special offers to boost visitation
<b>DESTINATION CHARACTERISTICS</b>						
Visitor Number of Tourists	Few	Many	Too Many	Many	Many	Many
Growth rate	Low	Fast growth	Fast growth	Slow growth	Slow growth	Decline
Accommodation Capacity	Very low	Low	High	Very High	Very High	Very High
Occupancy levels	Low	Very High	Very High	High	High	Low
Prices of Services	High	Very High	High	Low	Low	Very Low
Expenditure per capita	High	Very High	Very High	Low	Low	Very Low
Visitor types	Drifters	Innovators	Innovators	Followers	Followers	Cheap-mass market
Image and attractions	Low	Very High	High	Low	Low	Very Low
Tourists are perceived as	Guests	Guests	Customers	Customers	Customers	Foreigners
<b>MARKETING RESPONSE</b>						
Marketing Target	Awareness	Inform	Persuade	Persuade	Persuade	Loyalty/new market
Strategic Focus	Expansion	Penetration	Defence	Defence	Defence	Reintroduce
Marketing Expenditure	Growing	High	High	Falling	Falling	Consolidate
Product	Basic	Improved	Good	Deteriorates	Deteriorates	Decay
Promotion	Introduction	Advertising	Travel Trade	Travel Trade	Travel Trade	Travel Trade
Price	High	High	Lower	Low	Low	Below cost
Distribution	Independent	Independent	Travel Trade	Travel Trade	Travel Trade	Travel Trade
<b>ECONOMIC IMPACTS</b>						
Employment	Low	High	Very High	High	High	Low
Foreign Exchange	Low	Very High	Very High	High	High	Low
Profitability of private sector	Negative	Growing	Very High	High	High	Decline
Income of residents	Low	Very High	Very High	Low	Low	Very Low
Investments	Low	Very High	Very High	Low	Low	Very Low
State revenue & Taxes	Low	Very High	Very High	Low	Low	Very Low
Economic Structure	Balanced	Tourism oriented	Tourism dominated	Tourism Depended	Tourism Depended	Unbalanced and not self sufficient
Dependency on intermediaries	Negligible	Low	High	Over-dependent	Over-dependent	Over-dependent
Imports	Low	Very High	Very High	Very High	Very High	High
Inflation	Low	Very High	Very High	High	High	Low
<b>SOCIAL IMPACTS</b>						
Types of tourists	Allocentrics	Allocentrics	Midcentrics	Psychocentrics	Psychocentrics	Psychocentrics
Relationships between locals and tourists	Euphoria	Apathy	Irritating	Antagonism	Antagonism	Final
Demographics at destination	Immigrations and Older residents	Youth stays to work in tourism More balanced	Balanced	Balanced	Balanced	Immigrations as no jobs available and Older residents
Migration to the destination	Low	High	Very High	High	High	Low
Crime at the destination	Low	High	High	Very High	Very High	Very High
Family structure	Traditional	Effected	Modern	Modern	Modern	Modern
<b>ENVIRONMENTAL IMPACTS</b>						
Environment and landscape	Unspoilt	Improved	No respect	Polluted	Polluted	Damaged
Conservation and heritage	Unspoilt	Improved	No respect	Decay	Decay	Damaged
Ecological disruption	Unspoilt	Improved	No respect	Decay	Decay	Damaged
Pollution related to tourism	Negligible	Low	High	Very High	Very High	Very High
Water pollution	Negligible	Low	High	Very High	Very High	Very High
Congestion and traffic	Low	Low	Very High	Very High	Very High	Low
Erosion	Low	High	Very High	Very High	Very High	Very High

Destination life cycle and tourism impacts.

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# APPENDIX B

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# IN-DEPTH INTERVIEW W DISCUSSION GUIDE

## INTRODUCTION AND WARM UP

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- Greetings and introduction.
- Explanation of the research being conducted and general topic of the interview.
- Inform the respondent of the confidentiality of the information and that it will be used for the purpose of this research only.
- Inform the respondent that the interview will be taped to allow for further analysis of the information provided.
- Encourage the respondent to be free in his/her answers and comfortable in expressing his/her opinions and feelings about the different topics.
- Are there any questions?

## GENERAL INFORMATION ABOUT THE TOURIST/TRAVEL ACTIVITIES

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- How often do you travel overseas annually?
- Which foreign countries other than your own have you travelled to?
- Do you plan your holiday through travel agencies, tour operators, word-of-mouth etc?
- Do you usually travel alone, with your spouse or with your family?
- Tell me about your main activities and interests when you are on vacation?

## DESTINATION CHOICE AND IMAGE

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- What are the most important factors when you choose a destination?
- How important is a destination's image when making the decision to travel somewhere?
- What, if any, are your favourite destinations?
- What makes these destinations so special?

## SOUTH AFRICA

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### Projective Technique: Verbal Map

When I say South Africa, what are the first few words to come to your mind?

## CAPE TOWN

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### Projective Technique: Verbal Map

When I say Cape Town, what are the first few words to come to your mind?

- I want you to imagine you were back home, what will you tell your friends, family, colleagues or anybody you come into contact with about Cape Town? Probe for both positive and negative statements
- Have you been to Table Mountain? Do you think it really embodies what Cape Town has to offer to you?
- Will you revisit the country? If No, why not?

### PROJECTIVE TECHNIQUE

Ask respondent to close their eyes and think about walking down a corridor. There are rooms to the left and to the right of the corridor. As you walk you notice that the doors are labelled with the names of regions, countries and cities... you are walking quite quickly... you see France on the left... Paris on the right... Australia on the left... Sydney on the right... Switzerland on the left... Geneva on the right... etc etc... suddenly you slow down and see South Africa on the left... Cape Town on the right.

You stop outside the Cape Town room... open the door...

What do you see? No probing

What do you feel? No probing

What do you hear? No probing

What do you smell? No probing

What do you taste? No probing

What are the colours you can see? Probe blue, green, yellow, red and what specific things about the destination they associate with these colours.

Ask respondents where do they fit in the room? (at the door – standing outside; looking from a distance at what is happening in the room; are intensively involved in what is happening in the room; are they impressed/ unimpressed; do they feel the experience is authentic or fake)

**THANK RESPONDENT FOR THEIR TIME AND INPUT.**

Name of Interviewer:

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Date of Interview:

Main Reason for Visiting Cape Town:

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Nationality of Interviewee:

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# APPENDIX C

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University of Cape Town



8. From this list (*Show respondent the list on the Show Card*), please rank the 4 most influential sources of information in terms of how strongly they influenced your decision to visit Cape Town? (1=the most influential, 2=the second most influential, 3=the third most influential, 4=the fourth most influential).

	Rank	
1	Travel agent	
2	Tour operator	
3	Word of mouth from family/friends	
4	Information from the Internet	
5	Travel guidebooks	
6	Brochures/pamphlets	
7	Advertising/Promotion in your home-country	
8	Previous travel to Cape Town	
9	Information centres	
10	Other (please specify).....	

9. Please indicate the level of performance of Cape Town on the list of attributes that I am going to read to you. Please use this scale to indicate your opinion (*Show respondent the scale to use on the Show Card*).

(1=unacceptable, 2=poor, 3=neutral, 4=good, 5=excellent)

1. Value for money.	
2. Scenery and natural attractions	
3. Weather/Climate.	
4. Accommodation/ restaurants	
5. Architecture/buildings	
6. Local infrastructure/transport	
7. Friendliness/receptiveness of locals	
8. Entertainment and nightlife	
9. Safety during the day	
10. Historical and cultural attractions	
11. Shopping facilities	
12. Availability of information on things to see and do	
13. Safety at night	
14. The standard of service in general	
15. Accessibility of the destination from your home-country	
16. The image of the destination in your home-country	
17. Local cuisine	
18. Ambience of the destination	
19. Beaches and tourist attractions	

### DESTINATION IMAGE

10. Which of the following words (*Show respondent list of words*) would you use to describe Cape Town as a destination?

	Tick	Rank		Tick	Rank
1. Inexpensive			8. Vibrant atmosphere		
2. Fascinating culture			9. Poor road signs		
3. Sub-standard service			10. Unsafe		
4. Hospitable people			11. Exciting ambience		
5. Superficial attractions			12. New destination		
6. Vast/spacious landscape			13. Crowded facilities		
7. Cosmopolitan city			14. Many street-children		

15. Relaxed atmosphere		24. Sleepy atmosphere	
16. World-class facilities		25. High service	
17. Lush/green environment		26. Breathtaking scenery	
18. Crime		27. Racial tension	
19. Expensive		28. Poverty	
20. Outdoor/ Adventurous feel		29. Unspoiled/Unpolluted tourist sites	
21. Clean and hygienic facilities		30. Conservative ambience	
22. Variety of activities		31. Other (please specify)	
23. Diverse people			

11. From the list of words that you associate with Cape Town, tell me 4 words that you most strongly associate with Cape Town. The first word being the one that you most strongly associate with CT, the next word being the second most strongly associated word with CT etc. (Give respondent the questionnaire so that he can see which words he/she has chosen)
12. Compared to other countries you have visited what differentiates Cape Town as a destination?

	Spontaneous Response	Probed Response		Spontaneous Response	Probed Response
1 Scenery			10	Its location at the southern tip of Africa	
2 Culture			11	Nightlife	
3 Diverse people			12	Variety of things to see and do.	
4 Value for money			13	Wine Farms	
5 Rich and poor living alongside			14	Beaches and mountains	
6 V&A Waterfront			15	Rich history	
7 Table Mountain			16	Different lifestyle	
8 Nothing really			17	Kirstenbosch Gardens	
9 Cape Point			18	A combination of all the above	

13. Using this scale on the card (*Show respondent the scale*), please tell me the degree to which you agree or disagree with the following statements that I am going to read to you.

(1=strongly agree, 2=agree, 3=neutral, 4=disagree, 5=strongly disagree)

1	CT is very much what I expected it would be.	
2	The crime situation is not as bad as I thought it would be.	
3	I was surprised by the friendliness of the local people.	
4	Before coming to CT, I was told that the city offers a unique experience in terms of the variety of things to see and do.	
5	The city is much more beautiful than I expected.	
6	I was warned in my home country about the crime situation in CT.	
7	CT is very westernized and has a European 'feel'.	
8	There is enough information available on the destination in my home country.	
9	Table Mountain symbolizes what CT has to offer.	
10	I expected CT to be more wild and underdeveloped.	
11	I did not expect such high poverty levels in CT.	
12	I expected my trip to CT to be informative and a unique cultural experience.	
13	CT has a distinct image in my mind.	
14	CT offers very little of an 'African' experience.	
15	I was expecting a 3 <sup>rd</sup> world country but found 1 <sup>st</sup> world facilities and amenities.	
16	CT is not marketed properly in my home country.	
17	CT is very different from the rest of South Africa.	
18	The atmosphere is more laid back than I expected.	
19	I will definitely say positive things about the city to my friends/relatives/colleagues.	

## OVERALL ATTITUDE

14. On the basis of your experience in Cape Town, how likely are you to revisit the city using this scale. *(Show respondent the scale to use on the Show Card)*
1. Not at all likely  2. Not Likely  3. Neutral  4. Likely  5. Very Likely
15. How likely are you to recommend the city to friends/family/colleagues?
1. Not at all likely  2. Not Likely  3. Neutral  4. Likely  5. Very Likely
16. What is your overall image of the destination using this scale. *(Show respondent the scale to use)*
1. Extremely Neg.  2. Somewhat Neg.  3. Neither Positive nor Neg.  4. Very Positive  5. Extremely Positive
17. What is your overall satisfaction with the destination experience using this scale? *(Show respondent the scale to use)*
1. Not at all Satis.  2. Somewhat Dissatis.  3. Neither Satis. nor Dissatis.  4. Very Satis.  5. Extremely Satis.

## CAPE TOWN COMPETITORS

18. What other cities have you visited in South Africa? \_\_\_\_\_
19. How would you rate these cities on the following attributes when compared to Cape Town using this scale. *(Show respondent the scale to use on the Show Card)*

(1=better than Cape Town, 2=similar to Cape Town, 3=worse than Cape Town)

		Durban	Pretoria	Johannesburg		
1	Friendliness of people					
2	Personal Safety					
3	Weather					
4	Activities to see and do					
5	Service level					
6	Tourist attractions and scenery					
7	Culture					
8	Nightlife and entertainment					
9	Transport and infrastructure					
10	Accommodation					

## DEMOGRAPHICS

20. Gender    Male                   Female
21. Where are you from (Country of Origin)? \_\_\_\_\_
22. What is your main purpose for visiting Cape Town?
1. Holiday                   2. Business                   3. VFR                   4. Other \_\_\_\_\_
23. Your Length of Stay in Cape Town? \_\_\_\_\_
24. Your Length of Stay in South Africa? \_\_\_\_\_
25. Your Age? \_\_\_\_\_
26. What is approximately your monthly income in your home currency or US \$?
1. <500  2. 500 – 3499  3. 3500 – 6499  4. 6500 – 9499  5. 9500 – 12499  6. 12500 – 15499
7. 15500 – 18499  8. 18500 – 21499  9. 21500 – 24499  10. 24500 – 27499  11. ≥27500

**THANK RESPONDENT FOR THEIR TIME AND WISH THEM A PLEASANT STAY IN CT**