

**MARKETING TOURISM AS A BY – PRODUCT OF
THE LESOTHO HIGHLANDS WATER
PROJECT – DEVELOPMENT SITES**

By

AKWASI ARKO – ACHEMFUOR

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PROMOTER: PROFESSOR C.A BISSCHOFF

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ABSTRACT

This research was conducted to find ways by which the Lesotho highlands water project (LHWP) and the Lesotho Tourist Board (LTB) can effectively market Lesotho in general as a tourist destination and the Lesotho Highlands Water Project development sites in particular for foreign tourists and Lesotho residents.

There have been various studies conducted by the Lesotho Tourists Board and the Lesotho Highlands Development Authority to find ways of effectively marketing the tourist products on offer but most of the findings have not been implemented for one reason or the other. This study attempted to look at the providers overall marketing strategy that can be adopted by the service providers and the Lesotho Tourists Board in a co-ordinated effort to promote Tourism in Lesotho.

A literature review was conducted on the topic; the researcher collected information from the field through the use of questionnaires, interview schedule and observation. The questionnaire was administered to both foreign tourists and local holiday makers residing in Lesotho, tour operators and hotels and lodges. The interview schedule was meant for the officials of the services providing firms, Lesotho Tourist Board and the Ministry of Tourism. The study revealed that Lesotho and LWHP have interesting products on offer that appeal to most tourists. In addition the study found out that:

- * Lesotho and LHWP sites are not being well marketed and little information exists on Lesotho;
- * facilities and services are limited
- * Lesotho residents like recreation and holdings;
- * there is serious security concern causing image problems;
- * foreign tourist spends few days in Lesotho.

The study concludes by recommending for more facilities and services, security concerns be addressed and that effective marketing and promotional campaigns be undertaken in conjunction with the regional body RETOSA.

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CHAPTER 1

INTRODUCTION

1.1 HISTORICAL OVERVIEW

Tourism has been identified to be a booming industry all the world over and if its potential is fully explored and exploited adequately can help countries and businesses a lot in job creation, rural development, foreign exchange earning, inducement for business investment and income distribution. Travel and tourism can also help in the growth of other related industries like agriculture, transport and communication and other service sectors. According to Boncher (1999:13), tourism accounted for 11,5% of the world's Gross Domestic Products (GDP) and 12,5% of its employment. Tourism according to the World Tourism Organization (WTO) in some small Caribbean Islands states accounted for 25% of national employment and 30% of their GDP and a bulk of their foreign exchange earnings.

The potential for tourism for a country's growth strategy has been identified a long time ago but most countries have had plans for tourism without fully implementing the plans to help them to reap the benefits. The Commonwealth Secretariat organised a meeting of experts at Valletta (1967) for its trade ministers on cooperation in tourism development which discussed issues relating to: Tourism promotion and publicity; training for hotels and tourism industries; exchange of information and technical assistance, financial assistance; facilitation; government participation in the industry, fares and the meeting of experts on tourism. Other international organization like the United Nations organised a conference on tourism in (1963) in Rome that recommended a lot of measures to be taken by governments to facilitate international travel and tourism development. The year 1967 was designated as an international tourism year by the United Nations General Assembly. The World Bank through its affiliated bodies like the International Bank for Reconstruction and Development (IBRD), has provided funds to Financing Companies for reinvestment in projects in Tourism. The United Nations Council on Trade and Development (UNCTAD) at the second UNCTAD II in New Delhi (1968) reports by the Forth Committee on invisible *"Emphasized that tourism could bring great benefits to developing countries through its contribution to the balance of payments and to economic growth, and the planning for*

tourism in developing countries should be integrated to the overall economic planning, appropriate priority being accorded to the tourism sector". The year 1969 was set aside for the promotion of tourism in Africa by the General Assembly following the Economic Commission of Africa (ECA) study on the tourism industry in 1963, which focused on, the *"Economic aspects of tourism in East Africa-Sub Region "* that covered five main topics, namely:

- the role of tourism in the economy;
- the role of transportation in tourism;
- investment in tourism;
- tourism promotion; and
- customs frontier formalities.

The Kingdom of Lesotho has commissioned various of studies in the tourism industry. The first comprehensive research was conducted by the Kenya based Associate Research Consultants (ARC) in 1973. It was a detailed plan, that looked at the areas of Lesotho, that had higher priority for tourism development, investment in the industry, laws and incentives and the time frame for the recommendation implementation. The ARC report made recommendations for the building of the needed infrastructure like hotels, roads, airports, air strips and lodges. The few hotels and lodges that existed were in the vicinity of Maseru the capital city. The tourism products identified included the extreme beauty of the countryside, the high mountain and altitude, pony trekking and the main attractions of skiing near Oxbow on the highlands.

A decade after the ARC report another study was conducted for the government of Lesotho by Stokes Kennedy Crowley (SKC) which according to Walter Stohrer und Partner GmbH H (1993), was described as low key and low cost that recommended for the implementation of some of the products identified earlier and some few others like golf courts. Prior to the SKC study Steignberger Consulting GmbH had looked at Lesotho's position within Southern Africa and considered the strengths and weaknesses and recommendations made for their development in 1981.

A more recent study was completed by Marketing Services International – Walter Stohrer und Partner GmbH (1993) which looked at the future of tourism development

into the 21st century. It looked at the whole policy framework and guidelines and recommendation for implementation. It included the potential of the Lesotho Highlands Water Project (LHWP) and how it can contribute to the development of tourism in Lesotho, which had not featured in previous studies. The Lesotho Highlands Development Authority (LHDA) has also identified the tourism potential of the project and the potential contribution it can make to revenue generation and attracting foreign investment into the country. The LHDA and Lesotho Tourism Board (LTB) have carried out studies contained in LHDA's Rural Development Plan (1990) and LHDA's building of facilities – Contract LHDA No. 671). Studies are also in progress being carried out by Jefferson Consultants (Durham) for the development identification and recommendations on the tourism at the Mophale area of the LHPW. The initial report was given in March 1999.

Although a lot of the recommendations made by previous studies have not been implemented in full thus preventing the realisation of Lesotho's tourism potential, a lot of positive developments have taken place to help open up the tourism industry. According to Lesotho Tour Planner (1999). The building of the Moshoeshe1, International Airport in Maseru and more than 30 other small air trips where light air crafts can be used to reach remote mountain areas of the country from charter companies is helping in this regard. Besides, the construction of the Lesotho Highlands Water Project (LHWP) has opened up the interior of the country because of new asphalt roads and extension of electricity and water to some of these areas that contain most of the tourism attractions all are contributing to the industry's growth coupled with new hotels and lodges across the country.

Meanwhile, according to the 'Star' news paper (1999) the President of the World Tourism Council (WTC), Geoffrey Lipman, observed at the World Economic Forum (WEF) in Durban in the first week of July 1999 that the countries in the Southern African Development Community had 1,3 million people employed directly in the tourism industry and about 3,4 million in the broader perspective which he claimed was second only to that of South East Asia. Lipman (op.cit) went on to state that the world's tourism industry had a growth rate of 3,4% per annum where as the potential growth of Southern Africa is put at 5.9% per annum if the right policy frame work is put in place. The new political dispensation in South Africa has also contributed a lot to the flock of tourists to the region,

which can benefit all the other countries in the region. The World Tourism Organization (WTO) puts the GDP contribution to SADC countries from tourism and travel related industry at R84 billion and it is expected to increase to R215.4 billion by the year 2010. Government expenditure is expected to increase to R9 billion by the year 2010 i.e. 7% per annum. Private Sector investment will be at 4.5% per annum up to 2010. The WTO has commended SADC for the initiative on a Private/ Public Sector endeavor in promoting tourism called Retosa in addition to the Regional Tourism Organization for Southern Africa, (SARTOC). With proper development of the industry and effective marketing and promotions, a lot of the tourists visiting the region can be enticed to spend some of their holidays in Lesotho. The Lesotho Tourist Board (LTB) and the Lesotho Highlands Development Authority (LHDA) and others Organizations in the industry can take advantage of the high growth potential of Southern Africa regional tourism and develop and market the packages in Lesotho in general and the attractions the LHWP can offer tourists in particular.

1.2 OVERVIEW OF THE LESOTHO HIGHLANDS WATER PROJECT

The Lesotho Highlands Water Project (LHWP) is one of the largest and most complex civil engineering projects ever to be under taken in Southern Africa according to the LHDA (Resettlement and Development study-1997). The planning according to the LHDA and Trans-Caledon Tunnel Authority (TCTA) started in the 1950's and various studies were conducted leading to the signing of a treaty for the Lesotho Highlands Water Project (LHWP) on the 24th October, 1986 between the government of Republic of South Africa and the government of the Kingdom of Lesotho. According to the LHDA's- Resettlement and Development study (1997), three main objectives were identified for the construction of the dam between 1986 and the year 2017.

The three main objectives are to:

- generate revenue for Lesotho from the transfer of water from the Senqu River in Lesotho northwards via the Vaal River to the industrial heartland of South Africa;
- generate hydro-electric power for Lesotho; and to

- promote general development of the remote and under developed highland region of Lesotho.

The project shows man as an agent of change and development, and to this end, a lot of natural resources are being exploited through man's ingenuity for human advancement in order to bring about economic boost and improved welfare for nationals of the two neighbouring countries. According to the treaty, the project is to be implemented in four phases i.e. Phases 1,2,3 and 4. The phase one is divided into phase 1A and 1B. Phase 1A involved the construction of Katse Dam, Muela Dam, an 82 kilometre tunnel system and a hydroelectric power station to generate 25mw of electricity for use in Lesotho. This phase commenced in January 1991 and was completed in late 1997 on schedule. It was commissioned by the two governments in early 1998 (B.B.C Focus on Africa, April – June 1998:6). The phase 1B of the construction projects involves the construction of the Mohale Dam, a 30 Kilometre connecting tunnel to the Katse Dam and the Matsoku Weir, which was to bring the water supply from 18m³ by the Katse Dam, phase 1A to 30 m³/s (LHWP Environment Action plan – May 1990). According to the provisions of the treaty the implementation of phases 3 to 4 were to be considered at a later stage.

The construction of the dams and tunnels were to help in trapping the water behind the dam walls and generate electricity at the power station. Finally, from the power station the water will flow into the 'Muela Tailpond Dam into the 37km delivery Tunnel where the water leaves the tunnel system at the Ash outfall and flows via the Ash, Liebenbergsvlei and the Wilge Rivers into the Vaal Dam.

Figure 1 below shows the location of Lesotho in Southern Africa. Figure 2 shows the Map of Lesotho and the main points of entry, and main attractions. Figure 3 shows Lesotho and Lesotho Highlands Water Project (LHWP) sites.

Figure four shows the main project areas.

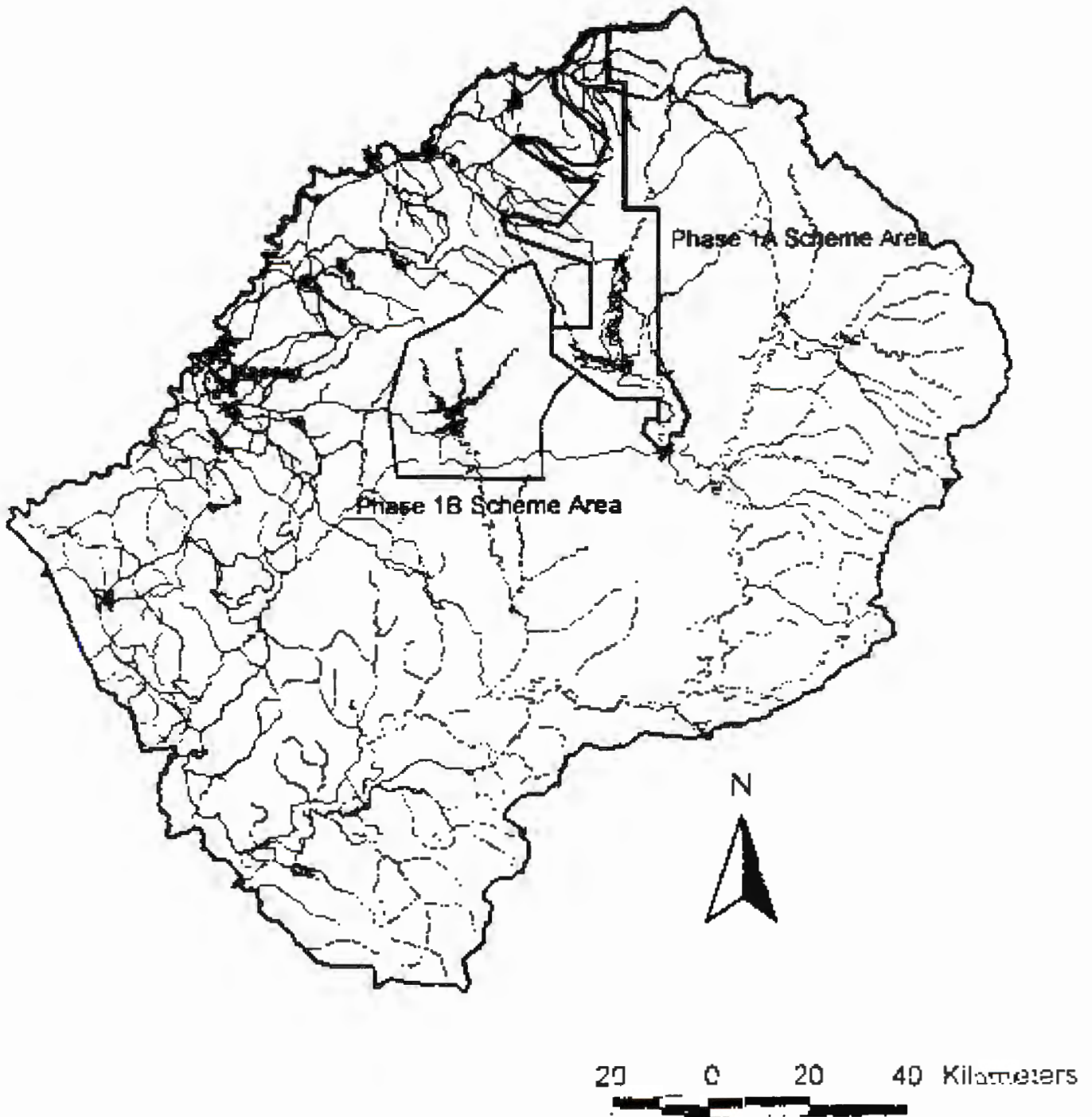
Figure 1: Map of South Africa Showing Lesotho



Scale: 1:50 000 km

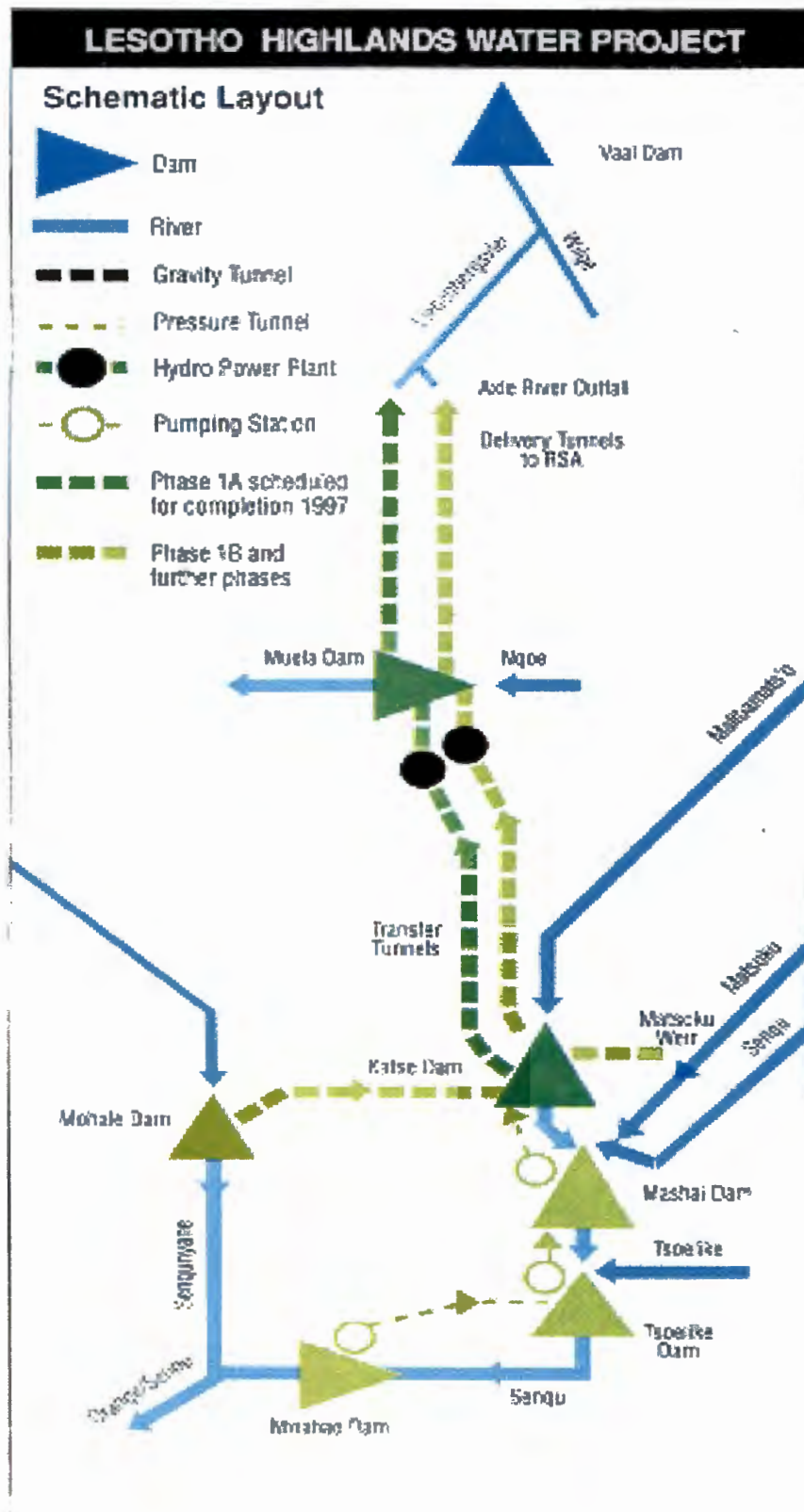
Source: Swanevelder et al. (1994:371)

Figure 3: Map of Lesotho Showing the Lesotho Highland Water Project Sites



Source: LHDA Resettlement and development study (1997:2)

Figure 4: Schematic Layout of Lesotho Hihghlands Water Project



Source: LHDA/TCTA (1994:1)

Although three main objectives have been identified for the planning and implementation of the project, the third objective is very broad which according to the LHDA's on Resettlement and Development Study (1997) will look at issues relating to compensation policy and options, resettlement and development plan and the impact the project will have on the environment as a whole so as to minimize its negative impact to the greatest extent. The tourism potential of the development sites fall within the third objective of the project.

1.3 BACKGROUND OF THE PROBLEM

The phase 1A of the LHWP was commissioned in 1998 by the two governments. When the project was started in 1988/89, contracts were awarded for the construction of access roads but contracts for the construction of the Katse Dam and tunnels were awarded in 1991 (LHWP-environment Action Plan-1990) led to the opening up of the heither to in accessible beautiful areas of the highlands to rest of the world visiting the LHWP development sites. This has turned the area to a busy tourist attraction centre something perhaps envisaged as a long-term by-product of the project. The LHDA and the LTB have all identified the high tourism potential for the area. The mountainous terrain with its cool temperate climate, beautiful scenery, peaceful environment, the warmth of the Basotho and their unique culture and traditions and the beautiful blue accumulated water spreading kilometres away, making the dam one of the largest man-made lakes in the world wettens the appetite of all people who visit the area. The LHDA has commissioned several studies to be made on the prospects of developing the sites and nearby tourist attraction products into a unique and enticing experience for tourists. The studies identified among others River running, Scub sailing, including cave diving, Hiking, Trekking, Canoeing, Board sailing, Mountaineering, Fishing, Rock Climbing, Water skiing, Horse trailing, Four wheel drive trailing, Cultural exploration (LHWP resettlement and development plan – 1997). The Lesotho Tourist Board (LTB) has also been promoting the LHWP sites and other places in Lesotho for same reasons – LTB Tour planner (1999:10). During summer in the Southern Hemisphere, it is winter in the Northern Hemisphere and many well to do people on holidays want warm, interesting and peaceful places to spend their holidays. In winter Lesotho is the only place in the Southern African Region where it snows and the altitude in Lesotho ranging from 1500m – 3482m above sea level which allows skiing enthusiasts to go to Lesotho among other attractions (Stohrer und Partner, 1993). The LHWP sites offer

tourists from South Africa, Europe and holidaymakers from Lesotho a ready-made destination for such visitors. The LHDA and LTB in February 1999 contracted consultants to study and make recommendations for tourism development in the Mohale Area, (phase 1B of the project) (Jefferson Consultants, 1999). The initial report has been presented to the clients. They looked at the needed infrastructure, the products to be marketed, and the community's role, security, staff training and other recommendations for implementation. Meanwhile there aren't enough holiday resorts and facilities within Lesotho itself for holiday makers from Lesotho which makes them to flood to South Africa especially areas near Lesotho like Philip Sanders Holiday Resort near Bloemfontein, Aliwal North for holidays especially during festivities and public holidays.

1.4 THE PROBLEM STATEMENT

The researcher, having been a visitor to the LHWP development sites (Katse and Mohale) on a number of occasions and seeing the enormous potential of the sites as possible tourism centres, foresees; if serious marketing campaign using both traditional and new information technology cannot be employed in marketing this young and attractive industry as a by-product of the Highlands project. This could serve as a source of employment, revenue generation and foreign exchange earner for the organization in particular and Lesotho in general. Other sectors like agriculture, the famous Basotho art and craft industry, transportation, hotels and tour operators can all benefit from effective marketing of the LHWP sites. Lesotho is currently facing serious unemployment crisis as a result of the massive retrenchments going on in the South African Mines. The miners contribute a big chunk of Lesotho's GNP. According to BBC focus on Africa Magazine (1997), since 1987 to 1997 the South African mines have shed 250000 jobs due to falling gold price, it explains further that out of this number it is estimated that 70000 are Basotho. According to the International Labour Organization (ILO) (1998), in 1994 a total of 40% of the Basotho male labour force was employed in South African mines whose remittances accounted for a third of GNP. In 1997 the contribution of mineworkers was M 1980 million i.e. 32% of GNP. The same source quoting The Employment Bureau of Africa (TEBA) the mining employment agency indicated that for the six months ending March 31, 1998, a total of 9000 Lesotho nationals lost their jobs on the South African mines. Meanwhile Lesotho has got all the potential to develop its tourist industry which can employ some of

those being retrenched from the mines and school leavers in this potential giant in employment creation and the other related industries.

A large number of tourists could be enticed to visit Lesotho and the LHWP sites but the infrastructure will have to be developed and the centres have to market themselves. Lesotho has not developed its tourism infrastructure, which if well developed could boost the economy. Jefferson consultants observed that *“The Highlands Project creates a giant “look” to encourage international visitors to Lesotho, which has never existed before. Frankly, in the past, Lesotho, has not offered enough for visitors to spend more than a few days. Even with the reservoirs, few people on holiday (excluding back packers) will spend not more than seven days in the country and probably less”*.

In essence the problem of this study can therefore be stated as:

How can the Lesotho Highlands Development Authority (LHDA) and the Lesotho Tourist Board (LTB) market tourism in Lesotho in general and the Lesotho Highlands Water Projects sites in particular locally and also to the rest of the world?

The following research questions realise:

- Is there the need to market tourism in Lesotho?
- How should the LHDA and LTB market the LHWP development sites as tourist attraction and destination for tourists?
- Who should the marketing campaigns target?
- What other activities will attract tourists to visit Lesotho and the LHWP sites?

1.5 THE PURPOSE OF THE STUDY

The purpose of the study was to make a contribution as to how the Lesotho Tourist Board (LTB) in general and the LHDA in particular can market the abundant and attractive tourism products on offer at the project sites, identify the products on offer, determine the target market for positioning and use the most effective communication channels to reach the target market. The study also investigated how the Lesotho tourist market can be

segmented effectively using various variables and methods. The study also investigated how the marketing mix can be used as strategy to market the tourism product. More over the study investigated the competition LHWP sites and LTB face in the region. Besides these the study also investigated the role regional cooperation and other suppliers in the industry can play in achieving the desired results.

1.6 THE SCOPE OF THE STUDY

The study focused on tourists who visit Lesotho in general and particularly those who visit the LHWP sites. Furthermore, officials from the LHDA, LTB, the officials from the Ministry of tourism, tour operators and travel agencies and ordinary Basotho holiday makers, the media and the hotel industry.

1.7 OBJECTIVES OF THE STUDY

This study aims to deal with the following objectives, namely:

- determine the target market for the Lesotho tourism industry;
- identify the tourism products the LHWP can offer to tourists;
- determine the other activities outside the LHWP sites that can form part of the package for tourists who want to visit the sites; and
- identify the appropriate marketing strategies and channels to effectively market the LHWP sites as a tourist destinations to the target market.

1.8 RESEARCH METHODOLOGY

This study would be undertaken to explore the possibility of using the marketing and promotional mix in marketing the tourism potential of Lesotho and LHWP sites. The study would therefore be an exploratory research. According to Leedy (1980:96), a research is “the commonsense and clear thinking that is necessary for the management of the entire research endeavour; the complete strategy of attack upon the central research problem”. The study will involve a survey and a literature study of all the possible stakeholders – the media, government officials, ordinary Basotho holiday makers, official of LHDA, tourists,

LTB, tour operators and officials of the Ministry of Tourism. The entire population of the study will comprise ordinary Basotho, people in the media, government officials tourists visiting Lesotho and LHDA officials. In view of the nature of the population, the researcher will adopt random sampling techniques in order to reach a more representation of the entire population.

In this survey study, in order to solve the problem under study, this researcher will use the following tools; namely:

- Questionnaires (Structured and non-structured);
- Interviews; and
- Observations.

Both structured and non-structured questionnaire were designed for the respondents to enable them to respond freely to the questions whilst avoiding deviations. Interviews were also conducted with the respondents especially the providers of tourism services in Lesotho e.g. LTB officials, LHDA officials, Tour operations, Hotel institutions, officials of the ministry of Tourism to get more insight on their plans and activities that the questionnaire did not cover. Observations were used at the points where tourists engaged in various activities to draw conclusions on the main activities they engage in at LHWP sites and other attractions.

1.9 DEMARCATION OF THE STUDY

This study divided into four chapters. Chapter one will prepare the ground for the study and will therefore contain the introductions comprising of the historical overview of the tourism industry, overview of the Lesotho Highlands Water Project (LHWP), background of the problem, problem statement, research questions, the purpose of the study, the scope of the study research design and methodology and demarcation of the study. Chapter two centres on the literature review on recent studies on the topic marketing tourism. It covers market segmentation, targeting, positioning, competitor analysis and promotion. Chapter three describes and discusses methods and techniques used in collecting and analysing data on this study and the results obtained from the study. Chapter four finally contains summary, conclusions and recommendations.

1.10 SUMMARY

This chapter sets the stage for whole study with the background and the research questions and objectives of the study. It also gives indication as to how the whole study will be conducted and the division of the whole study in to chapters and what will be contained in each chapter.

CHAPTER 2

REVIEW OF RELATED LITERATURE

2.1 INTRODUCTION

This chapter looks at the literature and studies done in tourism that are related to the marketing of tourism in general and to Lesotho and the Lesotho Highlands Water Project (LHWP) in particular. Briggs (1997:1) maintains that – it is easy to refer glibly to “tourists” as if they were an anonymous mass of people. Briggs (op.cit) explains further that there are many types of tourists whose needs and motives are different. There is therefore the need to identify who the tourists for Lesotho and the LHWP sites are and their motivations to be able to direct the marketing campaigns to reach them. The chapter will review literature on the customer analysis focusing on market segmentation, targeting and positioning for the Lesotho tourism industry and briefly on the competitor analysis. The review will look also at the use of the marketing mix in effectively marketing the tourism product to the target market including the use of cooperative marketing in the regional sense.

2.2 MARKET SEGMENTATION

Marketing strategy is defined by Cravens (1994) as ‘the analysis, strategy development, and implementation activities in selecting market target strategies for the product – markets in each business unit, setting marketing objectives and developing, implementing, and managing the marketing programme positioning strategies designed to meet the needs of customers in each target market’. This implies marketers of products and services need to adopt marketing strategies and approaches that can reach the target audience. Markets have to be divided as people have different needs and motives for buying products and services. This view is echoed by Briggs (1997:1) when she argued that there are different types of tourists where each group or segment has different needs and motivations. Kotler & Armstrong (1996: 235) defined market segmentation as dividing a market into distinct groups of buyers with different needs, characteristics, or behaviour who might require separate products or marketing mixes”. Heath (1987:284) supports the view of Briggs

(1997:1) and Kotler & Armstrong (1996:235) when he maintained that aggregation results in one tourism offer aimed at the total market. Heath (op.cit) moved further to explain that market segmentation on the other hand, is based on the assumption that differentiated market segments have different needs, awareness of products and exposed to different communication channels. Briggs (1997:68) emphasised that tourism marketers should not practice "broadcast" marketing or "something for every one" approach which according to her is expensive and is rarely successful. Middleton (1988:65) noticed that market segmentation is the practical expression in business of the theory of consumer behaviour orientation. He explains - further that segmentation sets the stage for setting marketing objectives and targeting, effectively planning, budgeting and control of marketing activities. The importance of segmentation is important for Lesotho tourism industry and the LHWP sites since the market can only be known after effective market segmentation. Foster (1985: 218) identified four main variables in market segmentation namely:

- geographical (region, market area size of city/town, population density);
- socio-economic (age, education, sex, income, family size, family life cycle religion);
- psychological variables (social class, personality traits, life-style); and
- behavioural variables (benefits sought, loyalty status, readiness stage).

Kotler & Armstrong (1996:238) agree with Foster and used the same variables for segmentation. Cravens (1994:193) on the other hand based his segmentation on four variables, which emphasised some different variables. The four are as follows:

- characteristics of people/organisations (age, gender, race, income, family size, life cycle stage, geographical location);
- use situation (occasions, importance of purchase, prior experience with products, user status);
- buyers' needs/preferences (brand loyalty, brand preference benefits sought, quality, proness to make a deal); and
- purchase behaviour (size of purchase, frequency of purchase).

Middleton (1988:70) identified six methods mostly used and which according to him are relevant to segmenting travel and tourism markets. He listed them as: purpose of travel;

buyer needs; motivations, benefits sought, buyer/user characteristics; demographic, economic and geographical characteristics, psychological characteristics and price. Gunn (1994:36) appears to share Middleton's method but he moved a bit further in accepting the proposed market segmentation prepared for use in Canada quoting the Marketing Management (1986). Seven methods used are:

- purpose of trip/use segmentation;
- channel of distribution segmentation;
- socio-economic or demographic segmentation;
- product – related segmentation;
- psychological segmentation;
- geographical segmentation; and
- use frequently / seasonality segmentation

Middleton (op.cit.) points out that hitherto segmentation in travel and tourism had been based on demographic characteristics, which according to him have not been found generally to be useful as anticipated. He mentioned three basic conditions any effective segmentation should meet, namely that:

- there must be great numbers in each segment to warrant attention;
- there must be sufficient similarities/characteristics within each group to give them distinction; and
- the subset must be viable worthy of attention.

The approaches by Gunn (1994:38) and Middleton (1988:70) are summarized in Table 2.1

Table 2.1 Summary of Segmentation approaches by Middleton (1988:70) and Gunn (1994:38) in tourism.

MIDDLETON	GUNN
<ul style="list-style-type: none"> • Purpose travel - Business - Conference - Cultural - Meet new people - Adventure 	<ul style="list-style-type: none"> • Purpose of trip/user segmentation - pleasure travel - personal business - other businesses - convention/meetings - tournaments /sports group
<ul style="list-style-type: none"> • Buyers needs, motivations and benefits sought - Luxury and high personal level of service - Speed of service and convenience - Economy - Large international hotels - Childrens' interest 	<ul style="list-style-type: none"> • Channels of distribution segmentation - direct customer sales - travel agents - tour operators - tour wholesalers - airlines - government marketing - regional/local associations
<ul style="list-style-type: none"> • Buyers or user characteristics • - frequent users • brand loyalty • tourist expenditure per capital • price • convenience 	<ul style="list-style-type: none"> • Socio economic or demographic segmentation - age, sex, education, income, family size, occupation, family life cycle, social class, home ownership, race or ethnic group, second home ownership
<ul style="list-style-type: none"> • Demographic, economic and geographic characteristics - sex, age, income, life cycle, marital status 	<ul style="list-style-type: none"> • Product related segmentation - recreational activity, equipment, - brand loyalty - benefit expectations - length of stay - transport mode

	<ul style="list-style-type: none"> - participation patters
<ul style="list-style-type: none"> • Psychographic characteristics - Predisposition to adventure - risk avoiders - attitudes - perceptions 	<ul style="list-style-type: none"> • Pshychographic segmentation - personality traits - life style - attitudes, interests, and opinions - motivations
<ul style="list-style-type: none"> • Price 	<ul style="list-style-type: none"> • Geographic segmentation - country, state, province and country - region - urban, suburban, and rural - city size - population density Use frequency/ seasonality segmentation - heavy users - moderate users - infrequent users

Source: Adapted from Middleton (1988 : 70) and Gunn (1994:38)

The markets segmented have to be selected for targeting and if it was well done then the target audience will respond to particular marketing mix. The segmentation of the Lesotho/LHWP tourism market is important in this regard to get the target market.

Despite the fact that most researchers and marketers find segmentation and targeting imperative, Wright (1996:18-24) questioned their validity and argued that there was no proof that the two provide superior returns for marketers who use it than those who use the shotgun. Cahill (1997:11) disagrees with Wright's position and argued that targeting helps in defining who the marketer wants to attract and tries to ensure their loyalty and long term profitability. He added that it is not for targeting specific people only but defines those the marketer does not want to attract. He/she will serve them possibly but will not make soecial effort to attract them. He went further to explain that segmentation allows small firms to own a segment and in his words for "*David to slay a Goliath*".

2.3 TARGET MARKETING

Once market segments have been identified and profiles drawn up, it becomes necessary to select the segment the marketer here the Lesotho Tourism Board and LHDA will seek to attract and serve. Cravens (1994) defines market targeting as *"the process of evaluating and selecting each segment that a company decides to serve"*. He argues further that it can be one or few or several segments. Meanwhile Heath (1987:290) cautions that in practice, the selection of the target market is a complex activity. He support Cravens & Lamb (1985:14) who stated that *"... the target market decision is a cutting edge marketing strategy, serving as the basis for setting and developing a positioning strategy"*. Briggs (1997:27) like Cravens (1994:298) maintains that it is essential to select a small number of markets or only a portion the people or organisations in a product-market, regardless of the breath of the targeting strategy used. This according to her is effective and less costly. The Associate Research Consultants (ARC, 1973) noted that the tourists to Lesotho were basically from South Africa which accounted for 96% of the market. About twenty-five years after the ARC study, the figure has not changed at all, it hovers around 95% according to LTB statistics (1996). It is difficult as has been observed by Heath (1987) to know the target market from South Africa tourists to Lesotho and LHWP sites. It is part of this study to identify the target audience of the Lesotho tourism market. Kotler & Armstrong (1996:250) identified three main coverage strategies in selecting a target market, which are:

- undifferentiated marketing;
- differentiated marketing; and
- concentrated marketing

Craves & Woodruff (1986:225) went a bit further in identifying targeting options in regional marketing from four angles which are:

- sales potential (current and future for revenue from the segment)
- competition in the segment and advantages held;
- cost (investment in tourism to attract this segment; and
- serviceability (ability to meet the needs of the segment).

In identifying the target market, Briggs (1997:68) identified nine criteria, which can be used to identify the segment:

- age;
- income status;
- purpose of travel;
- nationality (propensity to travel and engage in certain activities than others);
- geographical location/origin; and
- Lifestyle, consumer attitudes and behaviour. She adds that in targeting, the marketer has to look at:
 - the primary target (the current client group who you know and have been attracting and ideally showing good growth and
 - The secondary group (this may be difficult to reach and represents a more long-term objective but show excellent potential).

However, these criteria are limited are only by the imagination of the researchers. Any criteria to successfully segment and profitable market could be employed.

2.4 MARKET POSITIONING

When the target market is selected, the seller of the product/service has to develop a positioning strategy relative to other suppliers of similar products to the same market. Cravens (1994:302) noted that market targeting and positioning strategies are closely interrelated. Kotler & Armstrong (1996:254) define a product position as: *"the way the product is defined by consumers on important attributes – the place the product occupies in consumer's minds relative to competing products"*. These attributes according to them can centre on factors like economy, safety, luxury, and performance among others. They explain further that a products position is complex as it is based on a set of perceptions, impressions and feelings consumers hold for the product in comparison with closely substitutable products. They identified six positioning strategies as:

- product attributes;
- needs the products fill or offer;
- usage occasions;
- classes of users;
- against competitors;

- away from competitors and different product classes;
Cravens (1994: 209) on the other hand, based his positioning on:
- attributes,
- product user
- price/quality;
- use or application; product user; and finally
- competitors.

Heath (1987) gave four guidelines when positioning using the regional tourism in the cultural market, which can also apply to positioning of Lesotho and LHWP tourist market. The four guidelines are:

- look for unfilled needs especially unserved segments;
- do not position between segments as no advantages are derived from any of them;
- do not position in the middle of the map (where there are no distinguishing characteristics)
- do not serve two segments with the same strategy.

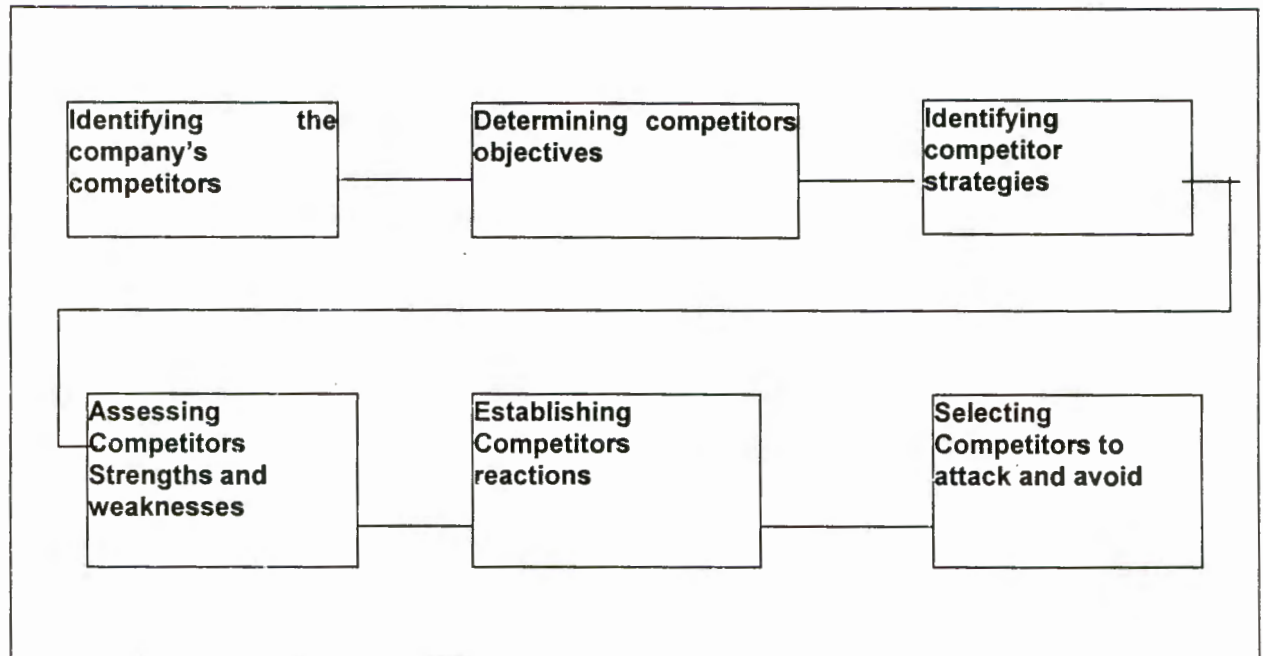
Cravens (1994:319) concludes and brings the point home in accessing the inter-relatedness between market targeting and positioning strategies when he noted that: *"positioning usually means that an overt decision is being made to concentrate only on certain segments. Such an approach requires commitment and discipline because it is not easy to turn your back on potential buyers. Yet the effect of generating a distinct, meaningful position is to focus on the target segments and not to be constrained by the reaction of other segments"*. Kotler & Armstrong (1996:26) moved further when they added that, once a product position is chosen, the seller should take serious steps to deliver on the position and communicate the desired position to the target consumers. They stress further that a company's marketing mix efforts must support the position strategy.

All the discussions so far have centered on the customer analysis but it is equally important to look at the competition Lesotho and the LHWP tourism face so that in developing marketing mix, competitors action and moves can be taken care of.

2.5 COMPETITOR ANALYSIS IN THE LESOTHO/LHWP TOURISM MARKET

The tourism industry is seen to be a very complex industry with a lot of competitors in the Southern Africa region offering almost the same products. Lesotho/LHWP tourism face serious competition from the regional neighbours like South Africa, Botswana, Tanzania, Namibia, and Zimbabwe to name a few who are well resourced. It is necessary for the LTB and LHDA and other marketers of tourism products in Lesotho to assess the competitors well and possibly find niches and serve them well to realise maximum benefits. According to Aaker (1988:70), competitor analysis gives the insight that will influence the product market investment decisions and helping the marketer to obtain and/or maintain strategic competitive advantage (SCA) and also to know their strategies, their strengths and weaknesses. Kotler & Armstrong (1996:595) defined competitor analysis as *'the process of identifying key competitors, assessing their objectives, strategies, strengths and weaknesses and reaction patterns; and selecting which competitors to attack or to avoid'*. They noted further that competitors are all firms making same products or services. In effect it implies competitors include all companies that compete for the same consumer dollars/rands. Competitor analysis is important for all marketers of products as it helps them to gain competitive advantage. According to Cravens (1994:39) competitive advantage occurs when an organisation's capacity exceeds the strongest competitors for a buying criterion that is important to buyers. Figure 2.1 below was used by Kotler & Armstrong to show steps in competitor analysis.

Figure 2.1: Steps in analysing competitors



Source; Adapted from Kotler & Armstrong (1996: 595).

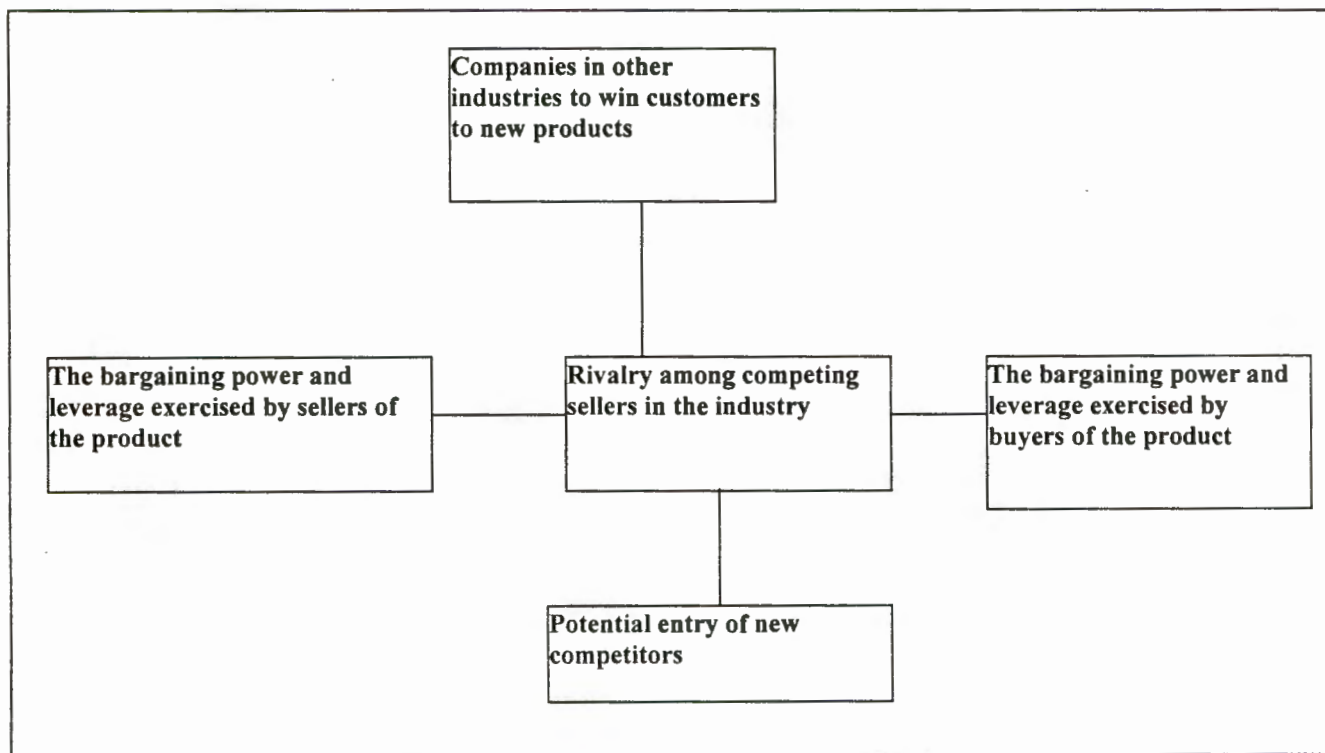
Competitor analysis helps the marketer to develop his/her own competitive strategies. Various competitive strategies can be used to gain competitive advantage. Thompson and Strickland (1998:137) identified various strategies a company can use to gain competitive advantage. They mentioned five main generic strategies as:

- low-cost provider strategies,
- differentiated strategies,
- best-cost provider strategies,
- focused or market niche strategies; and
- vertical integration strategies.

Meanwhile some experts argue that the five strategies have become basic for companies to survive in today's business world. Thompson & Strickland (1998:274) argue that to gain sustainable competitive advantage (SCA) companies should be able to develop core competencies and distinctive competencies. Core competencies are functions in a company's system, which a company does well relative to other internal activities., These they argue reside in a company's people and their skills, knowledge and capabilities. The distinctive competencies are the competencies which empower a company to build

competitive advantage in an industry in comparison to its competitors. Some experts emphasise the importance of future knowledge in helping companies to gain competitive advantage. Porter (1979: 137) combined the competitive forces from the side of consumers and the competitive forces from the side of competitors to form his famous Porter model, which in effect sums up the competitor and customer analysis discussed so far in this chapter. Figure 2.2 below shows the competitive forces.

Figure 2.2: Porter's five forces model



Source: Adapted from Porter (1979:137)

According to the LTB statistics (1996) South Africa remains the largest share of the arrivals into Lesotho averaging 95% from 1986 – 1996. The ARC study (1973) and Walter Stohrer und Partner GmbH study (1993:62) confirm that Lesotho's ability to attract international visitors was limited and that South Africa was going to be the major tourism market for Lesotho's tourism industry. Despite this fact South Africa tourism is a source of major threat to Lesotho and LHWP tourism. The LHDA's Rural Development Plan vol. 7, Area Infrastructure (July 1990:6) identified South African's tourist market, which is the prime

market for Lesotho and LHWP as highly competitive. The South African Tourism market was seen to be having good range of excellent domestic attractions ranging from the Kruger National Park to Sun City among others. This study will look at how LHWP and LTB and other providers of tourism products and services in Lesotho can use competitive marketing strategies to effectively market Lesotho in general and the LHWP in particular to the target market; thus developing a marketing mix for the target segment. The importance of competitor analysis in marketing is emphasised by Chase and Aquilano (1995:110) that a company that cannot achieve competitive advantage in its service delivery should at least try to achieve parity with its competitors.

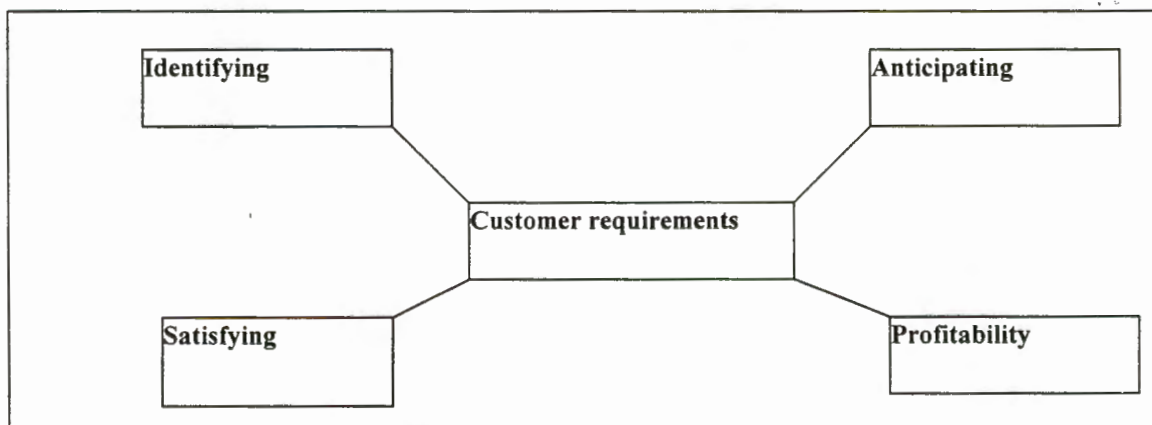
2.6 DEVELOPING A MARKETING MIX FOR THE LESOTHO TOURIST BOARD (LTB) AND LHDA IN MARKETING TOURISM IN LESOTHO

The Chartered Institute of Marketing defines marketing as:

“The management process responsible for identifying, anticipating and satisfying customer requirements, effectively and profitably”.

Trigg (1995:56) observes that identifying who our customers are and meeting their wants, anticipating here implies trying to forecast future needs and wants of customers, satisfying he explains as providing products and services at a price and at a time and place which satisfy the wants and needs identified. He adds that satisfying the needs lead to profitability that is essential for the survival of private organisations. He used the marketing function to explain marketing. Figure 2.3 shows the marketing function.

Figure 2.3 : The marketing function

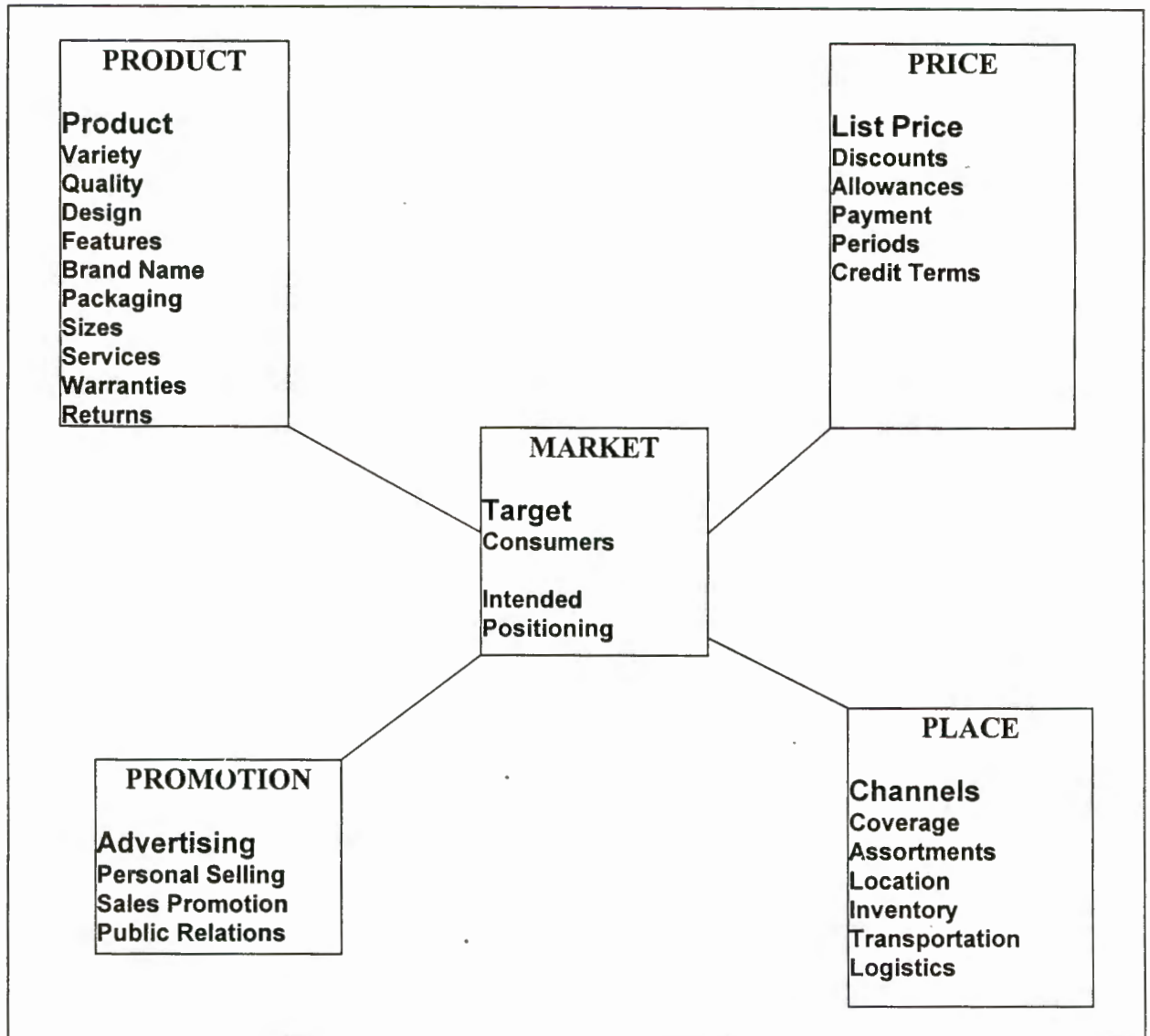


Source: Adapted from Trigg (1995:57)

The marketers of products and services aim at making profit but this can not be achieved unless the marketer is able to meet the needs and requirements of the customers. Meanwhile to be able to meet the needs the seller of the product/service should know his/her customers i.e. identify them and be able forecast their needs and providing the products and services that meet those needs. The concept in the figure are closely related and depend on one another with the customer requirements or needs at the centre.

Triggs (1995:58) refers to the marketing mix as tools and ingredients of marketing. He identified the tools and ingredients as: *"the activities which the organisation uses to influence customer demand for it's products and services"* Kotler & Armstrong (1996:48) were more specific in their identifications of the variables which can be used by the marketer to influence customers demand. They mentioned the marketing mix and called them – *"the controllable tactical marketing tools namely: the price, place, product and promotion which the firm blends to produce the response it wants in the target market"* This view supports Triggs definition of the traditional marketing mix. Schewewe and Smith (1980: 57) point out and argue that the marketing mix decisions cannot be made independently as each activity affects the other. They emphasise that the marketing mix decision should be integrated in order to provide a coordinated bundle of utility. Many writers refer to the product, price, place and promotion as the "four Ps" Figure 2.4 identified the variables that fall under each.

Figure 2.4 : The four Ps' and their components of the Marketing Mix



Source: Adapted from Kotler & Armstrong (1996:49)

2.6.1 SERVICE DELIVERY

A product or service can be described as something people buy to satisfy a felt need. Van der Walt, et.al., (1996:171) argued that the product is the key variable in all-marketing strategies. They explain further that this is so since other marketing decisions like methods of distribution channels, marketing communication and price depend on and are

coordinated with the product/service decision. They draw attention to the fact that a product is not necessarily a physical object as it can be an idea, a financial service, a commercial service just to name a few. They defined a product from a marketing point of view in the broad senses as: *“a collection of need-satisfying utilities (perceptible and/or imperceptible) offered to the market (consumers) so that the market can pay attention to it, by it or consume it”*. Cravens (1994:138) supports this idea of van der Walt et al. when he points out that a product includes both tangible goods and intangible services and ideas. He added that services differ from physical products in several ways. He noted further that services are intangible, cannot be placed in inventory, they are consumed at the time they are produced, there is often variability in the consistency of services rendered and more especially services are often linked to the people who produce them. He concludes that brand image for service requires association with the tangible components that produce the service. Chase & Aquilano (1995:105) hold similar view on the nature of services as explained by Cravens. They moved a bit further to explain that most services are made up of a combination of tangible and intangible attributes that constitute a *“service package”*. They added that such a package requires different approaches to design and management that are more than the production of tangible goods. They identified four elements in designing a services organisation. They called it the *“Strategic Service Vision”*. This view is linked to Heskett (1990:97). The four elements namely:

- the target market (who is our customer?);
- service concept (How do we differentiate our service in the market?);
- service strategy (What is our service package and the operating focus of our service?); and
- service delivery system (What are the actual process, staff, and facilities by which the service is created?).

In tourism the product concept is very broad and complex when compared to industrial products and other commercial services. Jefferson & Lickorish (1991:4) simplified the tourism product as *a satisfying activity at a desired destination*. They went further to insist that the two features should be present together. They point out that the tourism product is complex as it has wide options, services and suppliers involved and also to the fact that there are many interests involved which are interdependent on one another in most cases yet each interest is independent and they also compete with one another. Burkart and Medlik (1981:193) share similar views on the nature of the tourism product with Jefferson &

Lockorish (1991:4) when they referred to the tourism product as a composite product, an amalgam of attractions, transport, accommodation and entertainment. They point out that the facilities do not themselves generate tourist flow but at the same time their absence might deter tourists seeking attractions. They went a bit further in arguing that because of the diverse interests, product and sensitive nature of the tourist product; there is the need to coordinate all these separate interests to effectively market any tourist product. Lea (1988:31) identified five main types of facilities and services in the tourism industry as:

- attractions natural (land forms, flora and fauna) and man-made (historic or modern, cultural – language, music and folklore);
- transportation;
- accommodation (commercial hotels, guest houses, holiday camps); private sector (private residence and second home), and camping and caravanning;
- other facilities – supporting activities (shops, banks, restaurants, medical facilities); and
- Infrastructure (support items to provide facilities (road, rail, electricity, telephones).

In Lesotho, the LTB and LHWP sites have a lot of products on offer although it is accepted by LTB and people in the industry that the offer is limited. Despite the limitations of the product offer in the Lesotho tourism industry the ARC report (1973) mentioned what they called "*Unique selling proposition*" (USP) for Lesotho tourists who according to them derive from the nature of the country and its people. They identified this unique character in horseback and pony trekking, trout fishing and snow and skiing (this is now talked about with caution as it depends on the weather). According to them these three features had no parallel elsewhere in Southern Africa. *The Tour Planner* (1999) identifies many other tourist products and activities which include archeological sites (bushman paintings), beautiful scenes around the whole mountain areas, dinosaur trackways; historical sites, sites, beautiful waterfalls and clean and healthy rivers which are bilharzia free and the art and craft industry among others. According to the *Tour Planner* (1999) the LHDA and LTB have identified new tourist products and activities which include the building of facilities at the Katse Dam site and Mohale Area for the development of the areas to major tourists centres with facilities for water sports, trekking routes, picnic and camping sites and accommodation.

2.6.2 THE PRICE

In developing the marketing mix the price is one of the key factors in the “four PS”. Price is defined by Kotler & Armstrong (1996) as the amount of money charged for a product or service, or the sum of the values the customers exchange for the benefits of having or using the product or service. They noted that the price is very important in the marketing mix as previously price used to be the major determining factor that influenced buyer’s choice. They add that price is the only element in the marketing mix that produce revenue. They identified three main factors used by firms in making price decision namely:

- internal factors (marketing objectives, marketing mix strategy, costs, organisational considerations);
- external factor (nature of the market and demand, competition);and
- environment factors (economy, resellers, government)

Jeannet and Hennessey (1988:398) also had a similar views about factors that determine price and like Kotler & Armstrong (1996:341) they identified the three factors as:

- internal factors (income levels, competition); and
- Environmental factors especially in the international markets (foreign exchange rates, price controls, and regulations).

Kotler & Armstrong (1996 :351) moved further by isolating three main approaches in pricing products. They mentioned them as:

- cost based pricing which implies adding a standard markup to the cost price of the product;
- value based pricing – setting price based on the buyer’s perception of value rather than the seller’s costs and;
- competition – based pricing – where prices are set based on how competitors are charging or how the firm thinks competitors will price rather than on its own costs or demand.

Middleton (1988:58) referring to the tourism product pricing maintains that the objective of the seller as far as price is concerned is to achieve a predetermined sales volume and revenue objectives while to the buyers of the product or service, he/she seeks to maximise their perception of value for money in the choices he makes between alternative products.

He intimated that in the tourism trade there is a standard price for a product and one or more discounted or promotional prices reflecting the needs of a particular segment of buyers, or particular market conditions such as seasonality.

Jefferson & Lickorish (1988:30) perceived that there is not simply a question in the travel and tourism market of cheap or dear but that, what matters is whether the foreign traveller is satisfied with his "*bargain*". Trigg (1995:58) stresses the importance of pricing as mentioned by Jefferson & Lickorish but he was more emphatic that price is a major reason why people do not participate in leisure and tourism experiences. He added that some people are prepared to pay a higher price for the same tourist experience others will only pay if it is at a lower price concurring Jefferson & Lickorish view of the buyer's "*bargain*". For this reason he points out that tourist products are not priced at the same price by the marketers. Factors such as geography, price, discount, promotional pricing, discriminating pricing are usually used in this instance according to him in marketing tourism products. This assertion appears to contradict Middleton's argument that there is a standard price for tourism products although they share similar views on price variations based on geography, seasonally, promotion and discounts from time-to-time.

2.6.3 THE PLACE IN THE MARKETING MIX

Place, as one of the marketing mix is equally important in the market of a product or service. According to Kotler & Armstrong (1996:49), place includes all company activities that make the product available to target consumers. They mentioned the channels, coverage, assortments, locations, inventory, transportation and logistics as forming part of a place in a marketing mix. Trigg (1995:59) shares this view of the concept of place as described by Kotler & Armstrong (1996:673) when he stated that 'place' is concerned with getting the right product to your customer at the right time. He adds that the leisure product will be of no use to customers if they are not located where people expect to find them, or aren't made available when needed. Kotler & Armstrong (op.cit.) identified important component parts, which forms part of the distribution of leisure and tourism products as:

- transportation – to ensure the product is delivered to the right place at the right time;
- packing and display – making products more manageable;

- stockholding – making sure that stock of beds, seats, rooms and the like are available when needed; and
- communication – providing advice on events, tickets and complaint handling; for example

Middleton (1988:59) likewise Kotler & Armstrong (1996:674) and Trigg (1995:59) held similar views to the fact that a place does not just mean the location of a tourist attraction or facility, but argued that the location of all points of sale which provide prospective customers with access to tourist products. All major studies conducted on the Lesotho tourism industry including the ARC report (1973:28), Stokes Kennedy Crowley studies (1983:5), Steigenberger Consulting GmbH report (1981:2), Walter Stohrer und Partner GmbH (1993:5) and the most recent study by Jefferson Consultants (1999:4) all pointed out that there aren't enough facilities, no direct air link to from Lesotho to major international capitals, insufficient hotel accommodation, bad roads to the interior of the country and above all lack of information on Lesotho which most tourist outside the Southern Africa region think is part of South Africa or used to be one of the former homelands. Information on the Lesotho and LHWP products are limited even in South Africa the neighbouring country and the prime market for the Lesotho and LHWP tourism industry. The entry points to Lesotho are many from South Africa but few are well developed to handle heavy traffic to and from Lesotho. There are delays at the Maseru Bridge and Ficksburg borders the main points of entry and exit. Sometimes a visitor can spend up to two or three hours in the queue especially at the South Africa end during month ends, holiday and festive occasions.

Lesotho in general and LHWP sites have all the products which can appeal to a lot of the tourists out there but they have to market themselves to the potential target segments. This calls for effective marketing communication to market the product to reach the target market, which calls for the next in the marketing mix – or 'P' which is promotion.

2.6.4 THE PROMOTIONAL MIX

There are a lot of products and services produced in the world today, the problem of marketers is how to get their messages to the potential buyers and convincing them to patronise the products or services. Promotion is one of the “four Ps” in the marketing mix, which has a crucial role in market communication in reaching out to the target market. Kotler & Armstrong (1996:461) defined the promotion mix as – *‘the specific mix of advertising personal selling, sales promotion and public relations a company uses to pursue its advertising and marketing objectives’* They emphasise the importance of properly identifying the target audience so that the message can be formulated and the proper media chosen to convey the message to reach those it is intended for. They identified two broad types of channels of communication namely:

- personal; and
- non personal.

Personal communication channels are those channels through which two or more people communicate directly with each other, including face-to-face, person to audience, over the telephone or through the mail.

Non personal communication channels are those media that carry messages without personal contact or feed back, including major media, atmospheres and events, Kotler (1984) noted. Trigg (1995:58) adds that promotion is aimed at informing customers about a product or service with the intention of influencing their perception and behaviour. He noted that promotion cannot be done in isolation and he pointed out that the product, price and place have to be sorted out first. Middleton (1988:59) just like Trigg also found out that the other three ‘Ps’ are very crucial. He went further to say that promotion is only one of the livers used to manage demand. He adds that promotion will not be effective if it is not coordinated with the other ‘Ps’. He mentioned advertising, sales promotion, merchandising, sales force activities, brochures and public relations (PR) to be part of promotion. Botha (1996) found out that effective promotion helped Sun City to be known around Southern Africa and the rest of the world as a result of proper promotion at its lunch. This view is shared by a Nation on the March (1987) on the role of promotion on image development in the Bophuthatswana tourism industry. Botha (1996:21) emphasised

the role of the media in carrying promotional messages to the target audience. His view on the role of the media is linked to Saayman (1995) who listed the most important and available media in the tourism industry, assessing their strong and weak points. He identified the following media as commonly used. The print (brochures, direct mail, posters); Newspapers, Magazines, Outdoor, Sales point promotion, Radio, Television and Cinema. Most of the media mentioned above fall under the non-personal channels and are what will be termed the traditional media. Meanwhile Botha (1996) & Saayman (1995) appreciated the importance of all the media mentioned above in the tourism industry but concluded that the word-of-mouth was the most effective means of delivering a message to tourists. Promotion and promotional mix have to be used by marketers of products and services to make potential customers aware of and find ways of influencing them to buy their products or services. Assael (1993:552) defined promotional mix as a combination of communication strategies that a company uses to convey brand benefits to customers and influence them to buy. Four elements are used in promotional mix namely; advertising; sales promotion; personal selling; and publicity. Assael (1993:577) saw advertising as a paid for; on going; non-personal communication from a commercial service such as a manufacturer or retailer, it communicates messages about product; service; or company that appear in mass media such as television; magazines; or radio.

He explained the objectives of advertisement as creation of awareness, information; influencing; and making a product or service visible. He identified four main types of advertisements namely: brand advertisement (designed to maintain brand awareness to increase market share); product awareness (designed to attract new users by stimulating primary demand); co-operative advertising (designed to project corporate name – patronage; image and a company's position on an issue of public interest); and cooperative marketing which manufacturers offer to retailers to advertise their brands. He indicated that various media are used in advertisements but they can be broadly divided into two namely: broadcast media (television and radio); and print (news papers; magazines; bill boards; direct mail).

Sales promotions is one of the main components of the promotional mix. Assael (1993:554) identified two main types of sales promotion, which are consumer promotions and trade promotions, which aim at short-term inducement to customers and retailers respectively. He emphasised that consumer promotions are more closely integrated with

advertising strategies and must be combined with advertising for it to be effective as advertising provides or conveys product or service benefits. Berkowitz, et.al., (1992:650) agree with the views of Assael when he indicated that sales promotion especially advertising for many services is to show the benefits of purchasing the service. He emphasised services must be concerned with their image and that promotions contribute to image and positioning. He went further to explain that all tools are used in promotion but in services however; publicity is more common tool in the promotion of services. Personal selling is another component of the promotional mix. It is said to be a face-to-face communication between a company's sale representatives and customers and designed to influence the customer to buy the company's products or services. According to Assael (1993:553) it is a powerful element of the promotional mix as the marketer does not have to establish a message before hand and that he/she can assess the customer's needs; develop sales messages accordingly; evaluate the customers' reaction; and adjust the approach. He pointed out that it is the most important component of the promotional mix.

Publicity is an unpaid communication about the company or its product or service in the mass media like press releases for radio; news papers and magazines; films and television news show; company communication; special events. Assael (1993:558) pointed out that publicity is a subset of a company's public relations efforts. The objective according to him is to present a company and its products on a positive light by influencing relevant groups such as shareholders; government officials. In tourism marketing; Lesotho Tourist Board and LHDA can use publicity and public relations to inform the world especially the South Africa Media to create awareness and also correct the negative image projected in the recent past on its political problems which has negatively affected tourism in Lesotho. He concludes that managers must select a mix of each of the promotional elements – advertising; sales promotion; personal sales and publicity and allocate resources to each for effective campaign and the joint promotions he says can also be used by companies and business to join forces in promoting products and services as in the case of Lesotho's tourism the regional body RETOSA can be of assistance.

The travel and tourism trade is a very complex industry according to 'A Nation on the March' (1987) as it requires multifaceted infrastructure. New information technology is influencing the marketing of tourism all around the world today. Kotler & Armstrong (1996:475) point out that mass markets have fragmented and marketers are shifting from

mass marketing to focused so as to target micro markets. They mentioned specifically the improvement in new information technology through the use of computers that is helping to the acceleration towards segmented markets where messages can be tailor made for the target audience. Medlik (1981:246) agrees with Kotler & Armstrong's (1996:475) assessment of the growing importance new information technology in tourism. He predicts that there will be greater quality of information technologies around at home, in community and work places in the immediate future. He adds that societal changes will facilitate new forms if distribution of travel products especially for the next generation who will be more familiar with computers. Steinman & Choratas (1996:58) like Kotler & Armstrong and Medlik shared similar views on the growing importance of new information technology in marketing and promoting tourism products especially through the use of the internet. They assert that by 1996, there were R30 million Internet subscribers from 92 countries around the world. They add further that there was 100% connectivity in the 1993 – 1995 time frame. They move further to agree that the Internet provides competitive technology that is critical to the delivery of services to clients that enables them acquire the edge. Jefferson consultants (1999) shared the views of Steinman & Choratas (op. cit.) on the growing importance of the Internet and drew attention to the LTB and the LHWP to use the Internet to market their products and in their promotional campaigns.

It should be noted that since tourists are a very diverse group of people with different motivations for travel, incomes, interests and backgrounds, no single marketing promotion and channels will suit all of them. Kotler & Armstrong (1996:481) noted that integrated marketing communication is being used by most companies to market diverse and complex products. They define integrated marketing communication as *'the concept under which a company carefully integrates and coordinates it's communication channels to deliver a clear, consistent, and compelling message about the organisation and its products.*

In promoting Lesotho and the LHWP sites as a tourist destination, the ARC study (1973), Steigenberger consulting GmbH (1981), Stokes Kennedy Crowley (SKC) 1983), Walter Stohrer und Partner GmbH (1993) and Jefferson Consultants (1999) all maintained that Lesotho should use the regional body the Regional Tourism Organisation of Southern Africa (RETOSA) to embark upon cooperative marketing of tourism products jointly as part of the Southern Africa tourism market as Lesotho and the LHWP do not have enough resources and products developed enough to attract long-haul tourists from outside the

region on its own. Jefferson & Lockorish (1991:181) found out that synergistic potential offered by different organisations cooperating in various marketing activities can benefit all in the industry. They draw the attention of the difficulties companies face in reaching overseas markets and the need for marketers to be aware of potential partners and what they can do for mutual benefits. Heath (1987:379) holds a similar view on regional promotion and marketing of tourism in Southern Africa. He concludes that *“ regions provide a base for the formulation of tourism products which can be promoted in appropriate segments and which call for information services based on a region. In this regard, regional tourism organisations could play a major role in coordinating the regional tourism offering and providing the needed sense of direction to the regional components of tourism”*.

The by-product concept used in the topic is used in connection with tourism not forming part of the two main objectives of the LHWP. The study is not going to look at the marketing of by-products since the investment needed cannot allow the tourism products of the LHWP to be marketed below the cost.

2.7 SUMMARY OF CHAPTER

The chapter reviewed literature on marketing tourism in general and how it relates to the marketing of tourism by Lesotho and LHWP as tourist destination. The review centered on market segmentation in general and particularly segmentation in tourism, targeting which market serve efficiently and profitable. The choosing of a market position by marketers of products was also reviewed in addition to making a competitor analysis for the Lesotho tourism industry to identify the major competitors and their actions. The chapter also reviewed literature on the marketing mix and promotional mix in general and tourism in particular.

CHAPTER 3

RESEARCH METHODOLOGY AND RESULTS

3.1 INTRODUCTION

This study was undertaken with the aim of finding the most effective way of marketing Lesotho in general and the Lesotho Highlands Water Project (LHWP) sites in particular to foreign tourists and also to holiday makers residing in Lesotho. This chapter deals with the research methodology employed in detail and presents results obtained from the empirical research.

3.2 RESEARCH INSTRUMENTS

The study in effect is a social survey taking the form of a cross – sectional study design. In collecting the data, the researcher used the following instruments:

- questionnaire (open and closed ended);
- personal interviews; and
- observation

The universe or the entire population for this study comprised all foreign tourists who go to Lesotho, all holiday makers residing in Lesotho and all the organisations that provide holiday and tourism facilities and services in Lesotho. It would have been ideal to contact the entire population but time constraints, resources and the wide and diverse sectors involved in the industry makes such a task impossible. The chapter will also analyse the data obtained from the questionnaire, interviews and observation, and discuss the results from the analysed data. The researcher is thus using both primary and secondary sources. The primary sources are from the interviews, observations and questionnaire, while the secondary sources are from the literature review and the other written sources.

3.3 RESEARCH METHODOLOGY

The entire population as mentioned above is made up of foreign tourists averaging 3222 people a month according to Lesotho Tourists Boards (LTB) 1996 statistics. The hotels and lodges numbered forty in 1996 from LTB figures in 1996, ten tour operators, the Lesotho Tourist Board (LTB), Lesotho Highland Water Project (LHWP). The holiday makers in Lesotho is made up of the whole population of Lesotho. The emphasis is more on foreign tourists since they are high spending and patronise most of the activities.

The questionnaire (Appendix A) is divided into four sections namely sections A,B,C and D respectively. A is for all foreign tourists and Lesotho holiday makers and looked at general and personal information. Section B is specifically designed for foreign tourists. Section C is for officials of organisations that provide facilities and services for tourists and holiday makers, while Section D is for Lesotho holiday makers.

The researcher in an attempt to make his data more reliable did not only contact tourists and holiday makers but also conducted interviews with senior officials of the Lesotho Tourists Board, Ministry of Tourism, Lesotho Highland Water Projects, Managers of some notable hotels in Lesotho and the organisers of the Lesotho Arts and Culture Festival which took place at Morija Museum from October 1, 1999 to October 3, 1999. The investigator made prior arrangements with the officials and spent between thirty and forty minutes where a copy of the interview schedule was given in each case to the officials in question and researcher recorded the response. This was done since most of them preferred it that way. Their views and responses helped the research to get in- dept knowledge about the activities they are engaged in and compared them with those of the expectations of the tourists and holidaymakers.

3.3.1 The Questionnaire

In view of the wide nature of the population, the researcher adopted the random sampling technique to select 150 Lesotho residents and 150 foreign tourists, 10 hotels and four tour operators. Out of the number served with the questionnaire (150) for foreign tourists and Lesotho residents 130 was recovered from Lesotho residents and 120 was recovered from foreign tourists. For those who did not answer, they kept on asking the researcher and his assistant to come later and still they were not answered. For foreign tourists it was almost the same case as some of them who promised that the researcher should come later were found to have moved. For the Lesotho residents who were asked to answer the questionnaire they were selected at the points, boarder crossings, entertainment centers and nearby tourists centers. Every fifth person was approached. The same technique was used by the researcher for the foreign tourists who were tracked at Maseru Bridge, Ficksburg Crossing, LHWP Sites, Hotels and LTB Information Offices. The names of the hotels and four operators were written and put in a hat and shuffled and the assistant picked one until the required number was obtained to give each an equal chance. This method and techniques were used to get people who are interested in and patronise holiday resorts and entertainment centers and avoiding 'I don't know' responses from non interested persons and helping to reach the target.

3.3.2 Interviews

In the data collection process the investigator also conducted interviews with top officials in the organisations that offer tourism facilities, services and information in Lesotho, an attempt to make his data more reliable in addition to the questionnaire from local and foreign respondents to the questionnaire. The researcher in this wise interviewed tourism officials of LHWP, Environmental Officers, Officials from the Public Relations Department of LHDA. Managers were also interviewed at the LTB information office in Maseru, Marketing and Planning Officials were also interviewed at the LTB head office. In addition top officials at the Ministry of

Tourism and the officials who organised the Art and Culture Festival at Morija from October 1, 1999 to October 3, 1999 were also interviewed. This was undertaken so that their views could be compared with tourists and holiday makers from Lesotho to see where the views agree and also differ. These officials were selected for the interview since they organise and plan the activities and services and also involved in the marketing of the facilities and services their organisations offer to customers. In effect, they are experts in their fields and their views carry a lot of weight. Before the interviews, the researcher made appointment earlier with the officials and spent between 30 to 40 minutes with each of them. The investigator prepared both structured and non-structured questions that guided him in his probing of the respondents. A copy of the questions (Appendix B) was given to the official and the researcher asked the questions and recorded the responses. This was done as most of the officials preferred it that way and also saved time.

3.3.3 Participant Observation

One of the tools employed by the researcher was participant observation. As a former resident in Lesotho and having visited almost the breadth and length of the country for recreational, entertainment and other purposes, and also having visited nearby tourist facilities near Lesotho in South Africa and for some years now resident in South Africa where he visits a lot of tourist centers and facilities, has in dept knowledge about tourism services, facilities and the like. He participated in a lot of recreational activities and made use of tourism facilities and services and interacted with other tourists to get more insight about their motivations, preferences and concerns.

As a tourist and researcher, enthusiast and participant, these helped him in understanding the problem, service quality, preferences of tourists, their aspirations and also the problems and plans of the service and facility providers. Having collected from the three instruments: questionnaire interviews and observations, the researcher tabulated and analysed the data manually. The questionnaire was

divided into four sections namely sections A,B,C and D respectively. Section A was meant for all foreign and Lesotho tourists and holidaymakers. The questions were general and sought information on personal details. Section B was specifically meant for foreign tourist for their experiences, preferences and concerns. Section C was meant for officials of tourism service providers and Section D specifically for Lesotho residents and holiday- makers.

3.4 RESULTS

3.4.1 INTRODUCTION

This study aimed at segmenting the Lesotho tourism market, targeting the potential market, building a market position for Lesotho in general and LHWP in particular and finding the most effective tools and channels to promote Lesotho and LHWP to the target market. In this regard, the search for and gathering of data aimed at exploring the possibility of properly identifying the target market and applying effective promotional tools to reach the target market for LHWP and LTB as a whole.

Questionnaires were administered to seek information on several items that included: gender; age; marital status; nationality; country of permanent residence; mode of transport; purpose of visit; type of accommodation; income; previous visits; source of information; areas visited; days spent; assessment of Basotho and their relationship with tourists; and how Lesotho compared with regional competitors on price; variety; security; value for money; service quality. A part of the questionnaire sought information from officials on origins of their customers, type of tourists and activities they engage in when using their services and facilities. The last part of the questionnaire was meant for Lesotho residents and sought information on their interest or otherwise of holidays and tourism; where they spend their holidays and the level of information about LHWP; visits to LHWP sites; their sources of

information; preferred activities at LHWP sites; additional facilities that services providers should introduce / expand; the level of tourism promotions in Lesotho and the media they normally use.

The data collected from the field by means of questionnaire, interviews and personal observations were tabulated. The questionnaire consisted of 10 general items for both foreign tourists and Lesotho holiday makers. A total of 17 items were specifically meant for foreign tourists, four for officials of service providers in the industry and 11 items were specifically designed for Lesotho residents and holiday makers. Fifteen items were contained in the questions designed for the officials (Appendix B) of organisation who provide tourism facilities and services in the form of structured and non-structured questions.

The researcher chose the respondents from tourists at the named spots and places since it is not easy to identify tourists from any other visitors or people who are too many and using the spots helped the researcher to reach the target audience.

In all 120 foreign tourists, 130 Lesotho residents, 10 hoteliers , 4 tour operators and 2 officials each from LTB, LHDA and Ministry of Tourism completed the part C of the questionnaire on behalf of their organisations. The responses from the respondents helped the researcher to segment, identify the target markets, attempted a position LHWP and LTB can adopt and identify the form for promotion to be used to reach the target market for effective marketing of Lesotho and LHWP sites. The researcher spent one week in August in Lesotho in administering the questionnaire and collecting data and interviews. He spent another 10 days with his assistant in the last week of September and the first 3 days in October again in Lesotho to collect more data and conduct most of the interviews in those days. He attended the Arts and Culture Festival which took place at Morija from October 1, 1999 to October 3, 1999 where he met more tourists and interviewed the organisers and providers who exhibited their facilities and services giving him more insight and information.

Statistical measures like tables, graphs, pie charts and percentages were employed to analyse data collected in this study. The questionnaire was divided into four sections namely sections A,B,C, and D respectively and the analysis will follow those same patterns.

3.4.2 Data Analysis

Questionnaires: Foreign Tourists and Lesotho Residents

Gender of respondents

The first item on the questionnaire relates to the gender of the respondents tabulated in table 3.1

Gender of tourists and Holiday Makers

Table 3.1: GENDER

GENDER	NO.	%
Male	129	51,6
Female	121	48,4
Total	250	100,0

The findings from Table 3.1 above, shows that 129 people representing 51,6% were males while 121 (48,4%) were females. That is 51,6% of foreign tourist and Lesotho holiday makers are male and the rest female. The difference is not much but this can be explained by the fact that people have to travel long distances especially to Lesotho and the adventurous nature of the terrain may explain why the females are a bit smaller in number than the males as the risks are high and men are more likely to take higher risks than women.

Table : 3.2 Age Distribution of Tourists and Holiday Makers

AGE GROUP	NO	%
15 – 24	29	11,6
25 – 34	90	36,0
35 – 44	85	34,0
45 – 54	35	14,0
55 – 64	8	3,2
65 +	3	1,2
TOTAL	250	100,0

The ages of the respondents range between 15 and 65 years and above. The findings indicate that majority of the people who answered the questionnaire fall in their early adulthood, that is between age group 25-34 90 people (36,0%), followed closely by those in the 35-44 age bracket numbering 85 people (34,0%) out of the two hundred and fifty people. This shows clearly that people in their early adulthood and their mid ages alone constitute 70% of the respondents. The explanation may be the fact that most of the people in the 25 - 34 are people who have finished their tertiary education and not married yet who are planning to marry soon, they are now earning income and want to explore the world before marriage sets in. They could even be with their future spouses. Closely followed are those in the 35 - 44 group who could have been married and stabilised in marriage who may want to go out during holidays and festive seasons and long weekends to relieve themselves of stress from work and homes. The next group is the teenagers and early adulthood group, 15 - 24, most of them could be in educational institutions, they form 11,6% of the respondents.

They could be on school trips, accompanying parents on holidays or with friends exploring around. The next group is significant in numbers is the middle age group, 45 - 54, representing 35 people (14, 0%) of the respondents. These could be people well-established in life who are preparing for retirement. They want to explore around and take the family out and have quiet life in far away places from

home. They could have visited Lesotho before and might have old friends and will want to visit there again and see how changes like the LHWP and other development they normally hear of have changed from what they knew of.

The last two groups are people heading for retirement or already in retirement. The two are only 11 out of 250 people representing only 4,4%. The small numbers indicate that they are old people who will mostly prefer having their holidays closer to home and in less adventurous places with high mountains and dangerous roads and long distances hence the small numbers. Meanwhile, those who are old and participate could be old people who want quiet secluded place from the bust and hassle life in our cities today and also admire the beauty of nature and having fun and walking around when in such places.

Table 3.3: Marital Status of Respondents (Holiday Makers and Foreign Tourists)

Marital Status	NO.	%
Married	170	68,0
Single	50	20,0
Divorced	25	10,0
Widowed	5	2,0
TOTAL	250	100,0

Table ^{3.3} above examines the marital status of the respondents with 170 people forming 68% married while 50 people representing 20% are single. This may be so since the age groups occupying the largest numbers 25 - 44 are either newly married, are married already whilst the older ones are in most cases married. The married people could be going on holiday with their spouses. The single people will normally fall between the 15 - 24 age group who are in schools and preparing to marry. Those divorced occupy 10% of the respondents representing 25%. These people could be going out to occupy themselves out of loneliness or looking for new

partners or moving with their future spouses. Those widowed were 5 out of the 250 people surveyed making up 2%. This is quite a small number and they could be going far away from home on holidays and could be looking out for new 'catches'. They could have lost their partners recently.

Table 3.4: Nationality of Foreign Tourists and Lesotho Holiday Makers

Nationality	No	%
Lesotho	125	50,0
South Africa	105	42,0
Germany	5	2,0
United Kingdom	3	1,2
France	2	0,8
Australia/Newzealand	2	0,8
Other	8	3,2
TOTAL	250	100,0

Out of the 250 people who answered the questionnaire, 125 (50%) were Lesotho nationals, followed by South Africans with 105 people (42%). This can be explained that most of the respondents are Basotho who spend their holidays shopping and doing business in nearby South African towns iike Ladybrand, Bloemfontein and Ficksburg. For those foreign tourists close to 90% of those who responded to the questionnaire were from South Africa which is the main tourists market for Lesotho and LHWP. This may be due to proximity and nature of the weather and landscape that appeal to most South African tourists.

Tourists from Germany follow with 5 people (2%), these could be descendants of missionaries, who stayed and worked in Lesotho and also Germans who came to South Africa and decided to visit Lesotho. United Kingdom is the former colonial power for Lesotho and still maintains good ties with the country. Former officials

could be those visiting Lesotho and to see old friends and also children who never stayed in Lesotho or were born there would want to visit there from time to time. Tourists from France were 2 (0,8%) of the respondents. These could be descendants of missionaries in Lesotho who established a lot of mission there. Their descendants may want to visit there and see the graves of their great grand parents who were buried there in Lesotho. Tourists from Australia and New Zealand have the same respondents as those from France, 2 (0,8%). These could be people who seek adventure and might have heard of the LHWP who will want to see it and experience what they had heard of. Other nationalities are from Botswana, Swaziland, other European countries and North America. These could be visiting South Africa and also friends in Lesotho and see the country they have also heard of.

The next question was on the purpose of visit here since the researcher was specifically tracking tourists, of the 120 foreign tourists who completed the questionnaire, 116 people (96,7%) were tourists and the other 4 (3,3%) cited business and holiday. According to LTB statistics, the general arrivals in Lesotho in 1996 on the average 64,7% cited visit as the purpose, of 12,6% (holiday) and 22,7% as business.

Domicile in Lesotho when on Holiday

Respondents were asked about their places of abode when on holiday in Lesotho and the response are shown in Figure 3.1

Figure 3.1: Place of stay in Lesotho

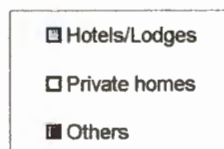
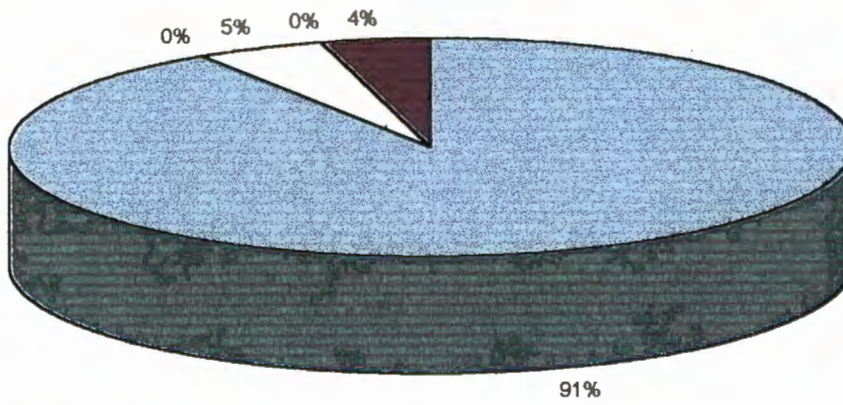


Figure 3.1 above indicates that 90,8% (109) respondents out of the 120 foreign tourists stay in hotels and lodges when on holiday in Lesotho while 6 (5,0%) stayed in private homes possible with friends and acquaintances during the nights they spend in Lesotho and go out during the day to various sites and spots. Five people out of the 120 (4,2%) stayed in other forms of accommodations possibly camping sites. Majority in effect stays in hotels and lodges. Income levels of Foreign Tourists and holidaymakers. Table 3.5 shows the income levels of respondents.

Table 3.5: Income levels

Income	No	%
Under R20000	5	2,0
R20 001 - R40 000	17	6,8
R40 001 - R60 000	33	13,2
R60 001 - R80 000	43	17,2
R80 001 - R100 000	59	23,6
R100 001 - R120 000	41	16,4
R120 001 - R140 000	34	13,6
R140 001 +	18	7,2
TOTAL	250	100,0

Table 3.5 the majority of 5,1 respondents (59 – 23,6%) fall within the R80 001 to R100 000 income bracket followed by those in R60 001 to R80 001 range with 43 people (17,2%) which is also followed closely by the R10 0001 - R120 000, that is 41 (16,4%). Next in descending order are those in R40 001 - R60 000 numbering 33 (13,2%).

These figures can be explained that most of the foreign tourists from South Africa will be in the middle income group whilst most Basotho in that group will be considered high earning who can afford travelling outside while for even low earning Basotho a day or two's visit to a nearby resort can be planned for at least

once or twice a year. For most of the other tourists from outside Africa their income could be mostly above R120 000. It can be seen from the table that most of the respondents fall in the middle and high income bracket, that is R60 000 and above taking 195 out of 250 who answered the questionnaire.

FOREIGN TOURISTS

This section of the questionnaire was answered by only foreign tourists and the results obtained are tabulated and discussed below. The first question asked respondents as to whether they had ever visited Lesotho before and out of the 120 respondents 43 people making up 35,8% said they had whilst first time tourists were 77, occupying 64,2%. Majority were first time visitors although there was a significant repeat visitors 35,8%.

A follow up question to the question above was meant for. The repeat respondents and sought information on the purpose of their previous visit(s).

A total of 43(35,8%) respondents did visit Lesotho before. The rest were first time visitors to the country.

Purpose of repeated visits to Lesotho is shown in Table 3.6

Table 3.6: Purpose of previous visits

Purpose	No	%
Holiday	8	18,6
Visit	21	48,8
Business	10	23,3
Other	4	9,3
Total	43	100,0

Table 3.6 above analysed the results of the foreign tourists who had ever visited Lesotho and the responses indicate visit tops with 21 out of 43 people making 48.8% followed by Business, 10 people (23,3%) and 8 people (18,6%) for holiday

with other reasons 4 (9,3%). This may be explained by the fact that possibly when on business they heard about places they could not visit and decided to come later. Those repeating might have enjoyed their previous visits. Those in the other could have also had good information on previous visits and decided to come on tour this time.

How information was obtained on Lesotho

Figure 3.2 below shows the responses of respondents as to how they came to hear of Lesotho.

Figure 3.2: How information was obtained on Lesotho

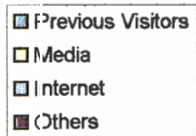
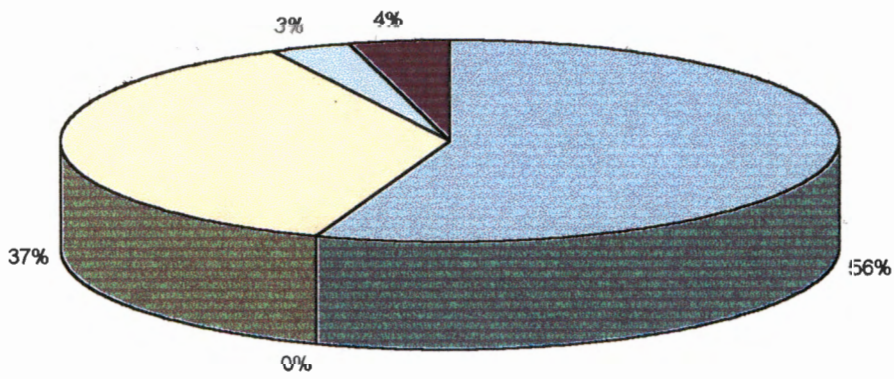


Figure 3.2 above and the analysis show that 56,% heard about Lesotho from previous visitors, followed by the media (TV, radio, print). Out of the 120 people 44 (36,7% and 132) heard from the media, the Internet provided 3,3% of the information whilst other sources like promotions, exhibitions attributed to the remaining 5 people out of 120 (4,2%).

The respondents were asked further as to whether they had heard of Lesotho Highlands Water Project (LHWP) before and out of 120 people, 115 responded in the affirmative representing 95,8% while 9 said no constituting 4,2%. Since most of the tourists are from South Africa and the project supplies a lot of water, the media has been featuring it from time to time possibly the high level of knowledge about the project. The next question asked as to whether respondents had ever visited LHWP sites and out of the 120 people 59 (49,2%) said they had while 61 (50,8%) said they had not. This means almost half of the people who go on holidays to Lesotho go to the LHWP sites.

A follow up question is meant for those who answered in the affirmative as to what attracted them to the LHWP sites. In all they were 59 and out of that 5 (8,5%) cited water sports, 13 (22%) mentioned the dam, 9 (15,%) the round and adventure, 29 (49,2%) liked the scenic view in the country side while 3 (5,1%) cited other reasons like wanting a quiet place, cool and fresh air among other reasons.

Facilities and activities that attract tourists most

Table 3.7 analysed the data from foreign tourists about the activities and facilities that attract them most.

Table 3.7 : Attractions and facilities

Attractions/ Facilities	No	%
Pony trekking / hiking	24	20,0
Water and water sports	15	12,5
Entertainment	13	10,8
Arts and Culture	15	12,5
Game and wild life	20	16,7
Scenic views	22	18,3
Shopping	6	5,0
Other	5	4,2
Total	120	100,0

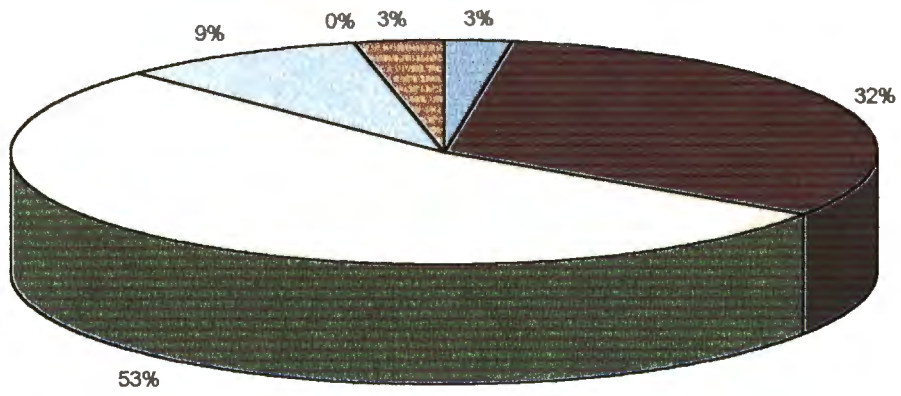
The analysis shows in Table 3.7 that pony trekking and hiking topped the attractions, out of 120 people 24 (20,0%) liked it most followed in second place by scenic views and country side made up of 22 people (18,3%). Game and wildlife is third on their preferences. 20 (16,%) of respondents with water (dams, waterfalls, rivers, fishing) coming forth with Arts and Culture numbering 15 out of 120 people and representing 12,5% in each case. Quite a good number likes these activities that Lesotho is enriched with. Entertainment in all forms from games to braais come next with 13 out of 120 putting it on top, that is 10,8% with shopping 5% and other activities relaxing, company and others representing 5 people out of the 120 who answered the questionnaire giving it 4,2%.

Other places visited by tourists when in Lesotho besides the LHWP sites and Maseru the capital city (57,5%). Morija, where the National Museum, archeological and art and craft can be seen and also conference centers located, attracted (12.5%). This area is a beautiful area with the pony trekking, stable and pony hiking trails, beautiful waterfalls, a high altitudes and high mountains passes which gives its name '*Molimo Nthuse*' - God help me pass. Oxbow area is where the main skiing resort is located with the highest mountain in Southern Africa, Thabana

Ntlenyana, (3482m) located. Skiing enthusiasts and mountain climbers could be those visiting these areas. Other attractions could be the historical sites like Thaba Bosiu, the fort of the founder of the Basotho Nation (King Moshoeshoe 1), where he held out against his enemies and various art and craft industries could be among the others.

The number of days foreign tourists normally spend in Lesotho are shown in Figure 3.3 below.

Figure 3.3: Number of days spent in Lesotho



- Oneday
- Two days
- Three days
- Four days
- Five or more

Figure 3.3 shows that most people spent 3 day on holiday that is 53,3% out of the followed by those who spent 2 days, 31,7%. Four days is next with 9,2% followed by 5 days and above 3,3% with one day at the bottom with 2,5%. This shows clearly that tourists spent few days in Lesotho and this could be lack of adequate and well developed tourists facilities and potential.

Activity and facility preference of tourists

Tourists were asked to indicate their preferences for the following- modern complexes, adventure, cultural activities, historical and archaeological sites and the country-sides. The respondents results are shown in table 9 below.

Table 3.8 Activity and facility preference of tourists

Facilities/ Activities	No	%
Modern complexes	12	10,0
Adventure	51	42,5
Cultural activities	12	10,0
Historical/ Archaeological	10	8,3
The country sides	35	29,2
Total	120	100,0

The results indicate that out of the 120 foreign tourists who answered the question 51 (42,5%) preferred adventure, this can be explained by their age groups followed by the country sides 35 (29,2%) indicating how people admired the beautiful Lesotho country sides. Modern complexes and cultural activities had 12 tourists each out of 120 preferring them 10%. This can indicate the rich culture of Basothos and their rich history. Historical and Archaeological sites had 10 tourists (8,3%) preferring them.

Assessment of Basotho's Friendliness to Tourists

Tourists were asked to assess how friendly or otherwise Basotho are to tourists and they were to rate them on very friendly, friendly and less friendly. Table 9 shows the responses obtained.

Table 3.9 : Assesses the friendliness of Basotho to tourists

Friendliness	No	%
Very friendly	39	32,5
Friendly	71	59,2
Less friendly	10	8,3
Total	120	100,0

The figure shows that the tourists find Basothos generally friendly with 71 out of 120 (59,2%) having that impression. 39 out of 120 tourists indicated that Basothos are very friendly and that is 32,5% whereas 10 felt that out of 120 (8,3%) Basothos are less friendly. This can be the results of their rich culture and long association with foreigners and having to cross the borders mostly to South Africa also as foreigners, tourists and for business. The tourists were asked to assess the adequacy or otherwise of the facilities Lesotho and LHWP have on offer to tourists and this showed that 107 (89,2%) indicated in their responses that there weren't adequate facilities and infrastructure in place whereas 13 out of the 120 (10,8%) felt the facilities and infrastructure for tourism were enough. This can be a reason for the small numbers of tourists to Lesotho and LHWP sites and the few days those who come to Lesotho spend there.

Foreign tourists opinion on if there are enough information on Lesotho/LHWP as a tourist destination. Was that 120 respondents 62 (51,7%) said there was, especially on the Lesotho Highlands Water Project. Forty-eight (48.3%) said

there was not enough information, especially on tourism, about Lesotho. The high information of the LHWP can be attributed to the fact that they are linked to the internet and most South Africans who form the bulk of tourists in Lesotho know about the Water Project from the media.

Assessment of Lesotho Tourism

Tourists were asked to assess Lesotho's tourism offer in comparison to the offer by its regional competitors on the following (prices, variety, value for money; service quality, access, and security). Figure 3.4 below shows the findings

Figure 3.4: Assessment of foreign tourists of Lesotho compared with regional neighbours on Security, Access, Service, Variety, Value&Price.

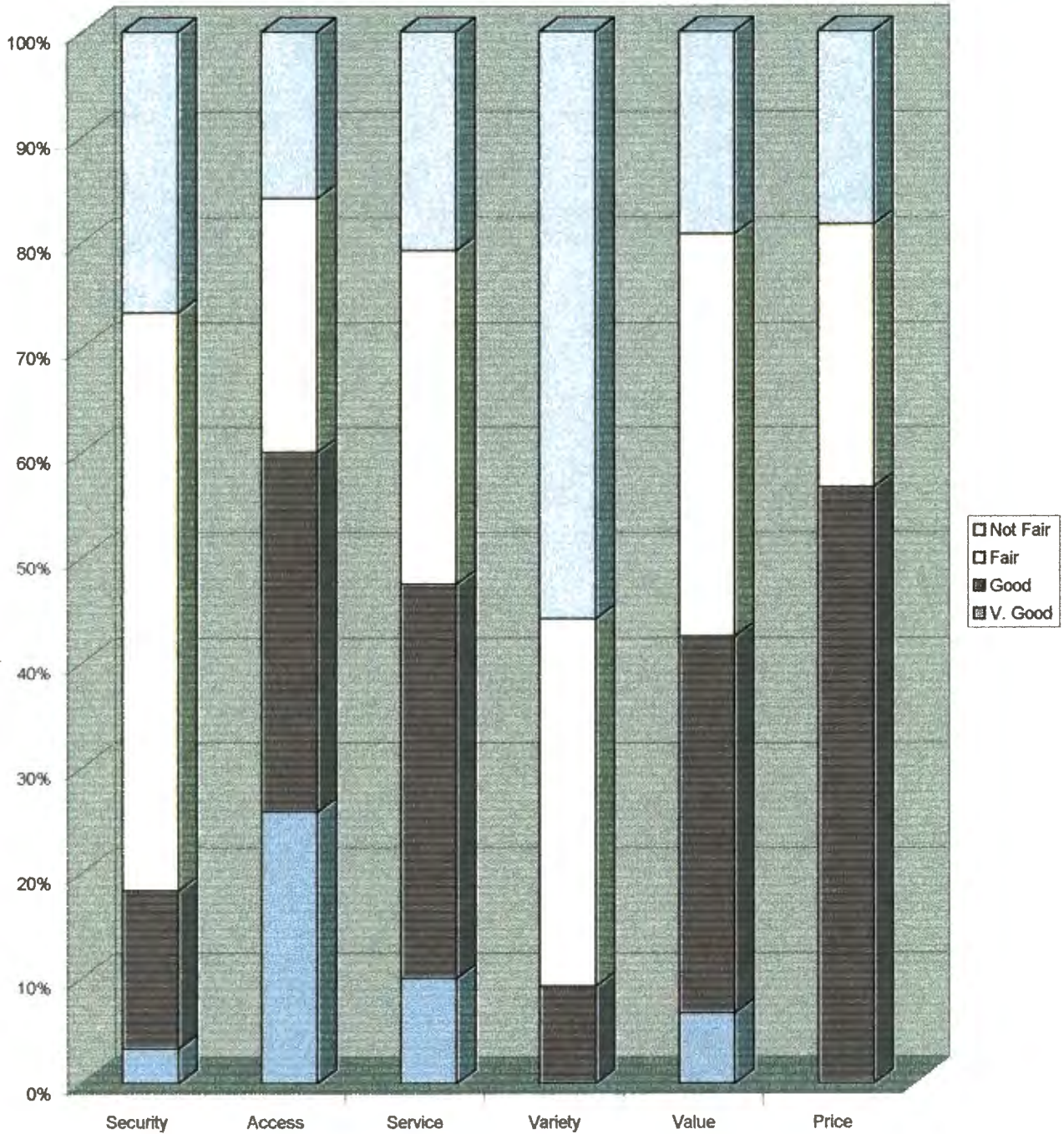


Figure 3.4 above shows that foreign tourists perceive prices of services to be generally good 56,7% followed by those who felt prices are fair 25,0% that is average and 18,3% of the respondents the price offer was not fair. The trend could be explained by the infrastructural development which appears low coupled with small variety of services and activities. On variety of facilities and services again non of the respondents found it to be very good and only 9,2% felt Lesotho and LHWP offer variety of activities and services.

Meanwhile 35% of the tourists indicated it was fair while a big percentage 55,8 indicated that facilities and services were few and inadequate. This could be part of their short stay in Lesotho as after a day or two there is nothing to see or engage in.

The figure again showed that 6,2% of the respondents indicated that they had their money's worth for going to Lesotho/ LHWP sites for holidays; 38,8% said it was good that is above average and another 38,3% felt value for money was fair and 19,2% indicated that they did not get their money's worth. In effect it appear tourists felt they had on the average their money's worth.

On service quality 10% of the tourists said it was very good, 37,5% responded that it was good and 31,7% felt it is fair or average whereas 20,8% said it was poor or below average. This may be due to lack of training and inexperience on the part of providers.

Service quality was also assessed by the tourists and when compared to that of regional competitors, 25,8% indicated that access to places were very good, 34,2% said it was good, 24,2% saw it to be fair and 15,8% felt it was not fair. The high marks or rating could be attributed to the opening up of the interior to the central highlands due to the access roads to the LHWP sites. Despite these

positive developments there are still more to do as 24,2% and 15,8% represented fair and not fair respectively.

Assessment of the foreign tourists on how Lesotho's security fared in relationship with neighbours showed that 3,3% felt it was very good, 15% said it good while 55,0% indicated it to be fair and 26,7% responded it was not fair. The trend shows serious concerns and this may be attributed to influence from South Africa and the recent political instability which has led to illegal guns falling into the hands of gangs and people losing their means of livelihood because of loss of jobs due to last years political problems. Also travel through South Africa to get there has a influence.

As to whether their expectations were met 65 out of 120 (54,2%) felt so, (54,2%) whilst 55 out of the 120 (45,8%) said their expectations were not met. This may be due to the few facilities and limited nature of the services as expressed in question 13 of Section B in Appendix A

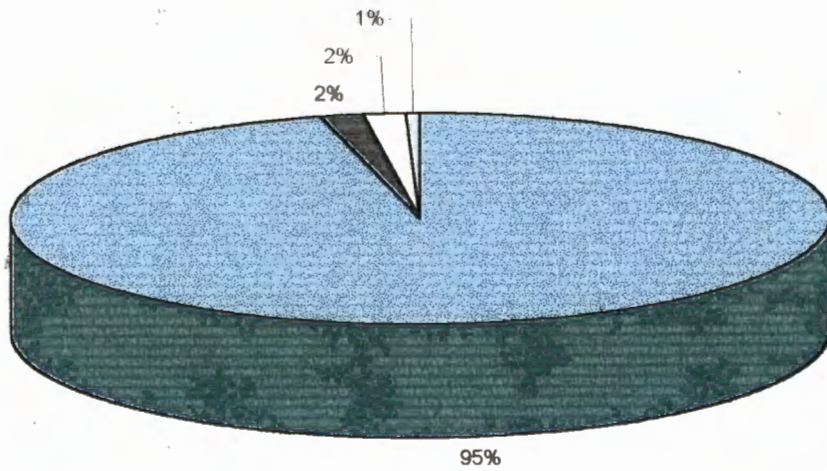
Respondents were again asked as to whether those who went to the LHWP sites will visit there again and out of the total number of those 59 who visited the sites, 35 said they will visit there again if they had the chance that is 59,3%, 18 (30,5%) said they will not whilst 6 (10,2%) said may be they will. By these responses majority are likely to visit the sites. The responses on whether they will recommend LHWP sites to others follow the lines of the result obtained above on whether they will visit the place again. Those who said yes explained that they enjoyed their visits while those who said no said they were not satisfied. Those 10,2% who were not sure of their expectations could not explain why. The foreign tourists were asked to make recommendations for improvement and a lot of them were made but the major ones centered on providing security at view points on LHWP sites, inadequate information and closure of information offices at the sites during weekends (73%) of respondents. The need to introduce more cultural

activities and provision of variety of services and activities and recreational centers. Poor roads in towns were also cited as an area needing considerable improvement especially Maseru (68%) emphasised this point.

SERVICE PROVIDERS

For Lesotho Highlands Water Project officials, Lesotho Tourist Board and other service providers in Lesotho's tourism industry. Their perception on where majority of their tourists come from, their means of transport to Lesotho, visits to LHWP sites and activities they prefer to engage in when at LHWP sites are discussed below.

Figure 3.5: Country of origin of tourists



The figure above indicates that 95,4% of the providers and official indicated that most of their tourists come from South Africa followed by Germany with 1,9% Swaziland 1,5% and finally Botswana with 0,6% South Africa is the main tourists market for Lesotho whereas Germany could have quite some number because of the past missionary activities and many South Africans of German and Dutch origin.

Service providers indicated the means of transport tourists enter Lesotho with are cars; 94,4% followed by buses 5% and the rest by other means. This can also be explained that air services are not very regular to the main airport in Maseru and most of the tourists are from South Africa and particularly the nearby Free State and Kwa-zulu Natal and the Eastern Cape from where it is easy to enter by car.

The people who normally go to the LHWP 65% and workers 20,5% (these are from various trades and professions) and, foreign tourists 8,7%. Visitors and the rest 5,8% are ordinary Basotho people.

Activities tourists engage in when in Lesotho/LHWP sites

A lot of activities were mentioned but the responses centered on six main activities. The responses indicate that pony trekking and hiking top their preferred activity with 40,7% . Scenic views followed with 23,1%, water sports and water occupied the third place with 13,4%. Cultural activities and Art and Craft is next with 8,3%, Historical and Archaeological site visits contain 7,8% and other activities mentioned include fishing, skiing depending on the season, mountain climbing, shopping and gambling could be part of the activities under other. It appears pony trekking and the scenic views and water and water sports rank high on the priority activities of tourists.

RESIDENTS OF LESOTHO

This part of the questionnaire was meant for residents of Lesotho and holiday makers. From the 130 Lesotho residents who answered the questions, 96 (73,9%) indicated they go on holiday and 34 (26,1%) say they do not. This shows Lesotho residents patronise holidays and related activities.

The response of the 96 holiday makers is that 88 out of the 96 said they spent their holidays in South Africa, followed by Swaziland with 19 people (14,6%). Botswana had 12 (9,2%) As the next popular destination; Zimbabwe had 4 people (3.1%). Europe had 5(3.9%). The other destinations were represented by 2(15%). The high numbers for South Africa can be explained by the fact that it is near and has well developed tourism infrastructure. Swaziland and Botswana's reasons could be visits and also proximity.

Reason for Lesotho Residents spending Holidays outside Lesotho

Several reasons were given by the holiday makers who spent holidays outside Lesotho. The major reasons are tabulated in Table 3.10

Table 3.10 : Reasons for Lesotho residents spending holidays outside

REASON	NO	%
Change	14	10,7
Water and sports	27	20,8
Variety	39	30,0
Shopping	29	22,3
Game and Wildlife	16	12,3
Other	5	3,9
TOTAL	130	100,0

Table 3.10 above analyses the reasons Lesotho residents give for spending their holidays outside Lesotho. Top on the reasons given is to get variety of activities with 38 out of 130 people (30%) followed by shopping 29(22,3%) and water and its related sports and entertainment 27(20,8%) Game and Wildlife follow next to the need for a change 14 (10,7%) as most of them were born and bred in Lesotho. The last reason is made up of others possibly nightlife, gambling, countryside and

others not very common in Lesotho. It can be seen here that the activities and facilities and services are few in Lesotho and LHWP sites. Most Basotho also do their major shopping in South Africa. Water and its related activities are important to them as most of them said they go to Cape Town, Durban and Sun City. The holiday makers were also asked as to whether they had heard of the Katse Dam and Mohale project sites and all the respondents said they had. This is a common knowledge in Lesotho, which they hear, on the radio, television, the press and other having relatives and friends and neighbours working there. Asked about whether they had ever visited the project sites out of the 130 people 72 said they had and, that represents 55,4% where as only 58 said they had never ever been there 44,6%. The dams have become one of the main sources of income to Lesotho and also employment for a lot of Basotho and people who have seen the pictures of the place try by all means to go and see it.

The sources of information on the Highlands Projects to Residents of Lesotho

The holiday makers indicated their source of information about LHWP which is shown in Figure 3.6

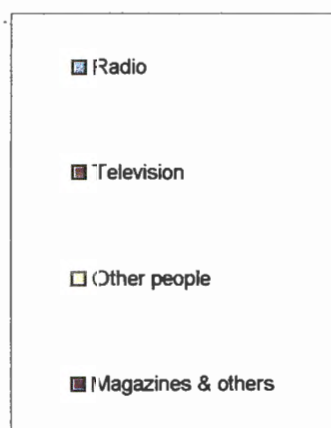
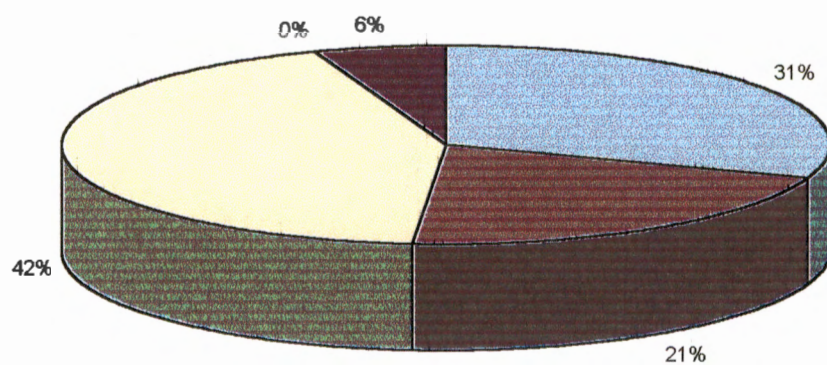
Figure 3.6: Sources of information to Lesotho residents

Figure 3.6 shows that 30,6% of respondents heard of LHWP from the radio, 20,8% had their information on the television while 43% had their source from other people or word of mouth, magazines, print and other electronic media give 5,6% information to people. The word of mouth and radio are very powerful in disseminating information in predominately rural communities.

The respondents indicated activities and facilities that interested them are the Katse Dam and the power station was ranked highest with 34 people (47,2%), this was followed by the beautiful mountains and the country sides 13 (18,1%). The beautiful road and the bridge across the dam is the third most popular site 12 (16,7%). Water sports had respondents (12,5%) as attracting and interesting to them. Four people (5,6%) cited adventure as what attracted and excited them most. It appears that the dam and the infrastructure and the beautiful country side and scenic views are what attract people most.

The holiday makers and Lesotho residents feel that the LHDA, Lesotho Tourism Board and other providers should add to the existing offers. Out of the 130 people 32 (24,6%) indicate National Parks to improve game and wild life, followed closely with 31 people (23,9%) was good shopping complexes and malls. Twenty-eight (21,5%) mentioned variety of entertainment facilities and centres and new hotels. Water and water sports facilities and equipment at the dam sites and in Maseru was next with 15 (11,5%) of the respondents going for it. Camping sites, hiking trails, pony tracks and nice gardens with braai stands also called for attention with 8 people (6,2%) mentioning it as important. Others were mentioned by 6 respondents, which accounted for 4,6%.

The respondents indicated that tourism was not promoted adequately in Lesotho (92 out of the 130 respondents). The remaining 38 (29,2%) felt tourism was being well promoted. By all accounts and indications from the responses it appears people are not aware of what is on offer to holiday makers in Lesotho.

The main sources of information seems to be Radio 69 people (53,1%), followed by television 37 respondents (28,5%). Daily papers and weekly paper followed with 12 people (9,2%) and Magazines with 6 people (4,6%). Others also had 6 out of the 130 people (4,6%). These could be trade magazines, the Internet, quarterly and annual reports and the like.

3.5 SUMMARY

This chapter looked at the research, methodology and the results of the empirical study. The population of the study was identified and the random sampling technique was used to get the sample from the population. In the analysis of the data statistical measures like percentages, graphs, tables and pie charts were used to represent summarised the data. Discussion was made in all cases based on the summary of the data.

CHAPTER 4

SUMMARY, FINDINGS, CONCLUSION AND RECOMMENDATION

4.1 INTRODUCTION

This final chapter provides the summary of this study conducted, draws conclusion and makes recommendations to the Lesotho Tourism Board LTB, Lesotho Highland Development Authority (LHDA) and other interested parties in Lesotho's tourism as to how they can effectively market the abundant tourism resources yet untapped to foreign tourists and also put infrastructure in place for the many Lesotho holidays makers who have to go elsewhere for their holidays. All countries and organisations are finding ways of improving their goods and services they have on offer in the increasingly global and competitive market. There are many countries in the world all trying to capitalise on the growing demand for tourism services and facilities and despite the fact that mostly the small countries in the developing world are not able to complete in the areas of technology, agriculture and other areas, tourism if planned and managed well with the abundant natural endowments, with little organisation and appropriate marketing strategies and the infrastructure in place, the small countries like Lesotho can become winning nations in reducing unemployment, earning foreign exchange, stimulating growth in the other sectors in the economy among other benefits.

4.2 SUMMARY

The main purpose of this study was to make a contribution as to how the Lesotho Tourist Board (LTB) and other tourism services provided in general and Lesotho Highlands Development Authority (LHDA) in particular can market the abundant and attractive yet undeveloped tourism offer to the outside world and Lesotho residents, by properly segmenting the market, identifying the target market, building a market position and finding the most effective communication tool and channels

to send the message to inform the target group and attract them to Lesotho and Lesotho Highlands Water Project (LHWP) sites.

The specific objectives of the study aimed at the determination of the target market for Lesotho's tourism industry, identify the tourism products/services LHWP sites can offer packages that can be added to the few existing offers in Lesotho and particularly at the LHWP sites and identifying the appropriate marketing mix and channels through which Lesotho and LHWP sites can be effectively marketed to the target market as a major tourist destination.

A descriptive social survey was used as the design of this study through which both structured and non-structured questionnaires were used to collect data from tourists, and holiday makers and tourism service providers by using the random sampling technique from the population particularly aiming at places that could be reached. An interviews schedule was prepared by the researcher to have face-to-face interview with the officials of the major tourism providers in Lesotho to get insight about their activities and hear their side of the story and also on issues that could not be anticipated in the questionnaire and other secondary sources. Participant observation was also used by the researcher to gain more information on tourists and to mix with them and interviewing them to know their needs and their preferences and expectations.

In addition to that, secondary source through a literature survey highlighted on methods that can be used to segment the market identifying the target market, building a market position, doing a competitor analyses and employing the marketing mix, promotional mix and co-operative marketing in effectively marketing a product or service.

4.3 FINDINGS

From the data collected from the primary sources through the questionnaire, interviews conducted, participant observation and the secondary sources from the literature study, the following findings were established namely:

- 4.3.1 There is the need to market Lesotho well to the outside world and the residents of Lesotho as it has the potential and unique tourist attraction like beautiful scenery, historical and archeological sites, a rich art and culture that are not being effectively being tapped and a nice climate for all seasons.
- 4.3.2 A lot of people both Lesotho residents and foreign tourists do not have adequate information on Lesotho and the Lesotho Highlands water project sites and the attractions they can offer tourists and holiday makers as most of the respondents indicated their main source of information was from other people and previous visitors.
- 4.3.3 The services and facilities now in place in Lesotho and LHWP sites are woefully inadequate especially recreational centres and facilities, hotels, shopping complexes and malls. Eighty-nine percent of foreign tourists indicated that services and facilities are inadequate.
- 4.3.4 Lesotho residents are interested in holidays and will spend a good part of their holidays in Lesotho if services and facilities are improved and a lot of awareness is created.
- 4.3.5 There is no coordination of activities from the providers of tourism services and facilities.
- 4.3.6 The image of the country and security concerns of tourists are of major concern as majority of the foreign tourists indicated that security in Maseru

and some tourist attraction points are inadequate and either they experienced problems or were informed by others to be careful. The political instability also scares foreign tourists.

- 4.3.7 The main target market was found to be South Africans in their early adulthood and in middle adulthood who fall in the middle and high income of brackets. They appear to be mainly those who seek adventure recreation and entertainment and beautiful country-sides.
- 4.3.8 There is inadequate information on Lesotho and Lesotho Highlands Water Project (LHWP) site tourism offer in the South Africa media and there is no information on Lesotho tourism on the internet which is one of the main sources of information to the possible target market and especially people from other continents who come to South Africa.
- 4.3.9 The promotional mix is not being effectively used to market the tourism potential of Lesotho and LHWP sites especially in the form of exhibitions and tours.
- 4.3.10 The foreign tourists spend few days in Lesotho averaging 3 days, which is a cause for concern and despite the few accommodation facilities the occupancy rate is below 40%.
- 4.3.11 Most tourists and holiday makers visited the LHWP sites and found it worthwhile and indicated with improved sports and other facilities and security they will come again.
- 4.3.12 A lot of local holiday makers and tourists mentioned game and wild life as being of great interest to them.

4.4 CONCLUSIONS

- 4.4.1 Lesotho has a rich culture and tradition and the natural beauty of a country with friendly people, these are potential which have not be tapped and marketed well. With improved facilities and aggressive marketing Lesotho and LHWP can derive great economic benefit for the country and her people.
- 4.4.2 Information on Lesotho tourism and facilities and services within the country and outside are inadequate and that the main source of information on Lesotho is world of-mouth meaning other source are not being well used.
- 4.4.3 Both Lesotho residents and foreign tourists do not have enough to enjoy about for a longer time when on holidays in Lesotho and LHWP project sites and this could be the cause of their short stay and small occupancy rates in the existing accommodation.
- 4.4.4. If facilities and services and shopping malls and complexes are built most Lesotho residents and foreign tourists will patronize them to the fullest.
- 4.4.5 The level of cooperation for interested parties in the industry and even the government are not good or they are limited and this does not augur well for the progress of the industry. The regional body RETOSA is strong and can help member countries in their marketing endeavours.
- 4.4.6 There is an image and security concerns for foreign tourists especially political instability and serious security concerns experienced by tourists and holiday makers at certain tourist attraction centres. Some of these are real whilst others are perceptions and expectation based on previous experiences of previous visitors and foreign nationals who visit and reside in Lesotho.

- 4.4.7 South Africa is the main source of Lesotho and LHWP main customers for tourism and other neighbouring countries like Swaziland, Botswana and other European countries like United Kingdom, Germany and high income earners made up of young adults and people in their middle adult hood who are adventurous in nature.
- 4.4.8 There is less information on Lesotho and LHWP' tourism offer both in Lesotho and abroad. There appears to be limited media coverage limited pamphlets and brochures and tourist maps on places and activities and limited information offices in Lesotho and especially in South Africa on Lesotho.
- 4.4.9 Few promotional tools are being used to market Lesotho and LHWP sites, services and activities. All the four promotional tools (personal selling, public relations, advertising and promotions) are not being well used to inform and attract people to the country and LHWP sites.
- 4.4.10 Most tourists and holiday makers like the project sites of LHWP and will want to visit the place in the future if services and facilities can be improved.
- 4.4.11 Game and wildlife attracts a lot of local and foreign tourists, as it was one of the main issues or attraction holiday makers and tourists mentioned as being of interest to them.

4.5 RECOMMENDATIONS

The following recommendations came out from this study as a result of the data and literature review.

For the Lesotho Highlands Development Authority.

- 4.5.1 The findings on the facilities and services indicated that there is the need for LHDA to increase the accommodation to be used by guests and the provision of enough water sport equipment and safety measures for the guests who like these recreational facilities. Hiking trails and pony trekking sites should also be introduced to entice tourists. Other sports facilities like tennis, golf and swimming pools can be included.
- 4.5.2 Camping sites which are secured and braai spots and facilities should be established at tourist attraction centres.
- 4.5.3 The finding of the study also indicated that tourists and holiday makers fear for their security at various view point because of previous attacks on tourists and holiday makers and there fore LHDA should provide security at the attraction points and view points.
- 4.5.4 The tourists and holiday makers complained about inadequate information as during week-ends, and holiday periods and month ends, the information offices are closed and this is the time most tourists and holiday makers have time to tour. Again the Internet should be used as a powerful tool to inform potential tourists to the region about the wonderful offer LHDA and Lesotho have.

- 4.5.5 LHDA should consider establishing a national park within the project area, as it is one of the major interest tourists and holiday makers mentioned in conjunction with the government and private investors.

To Lesotho Tourist Board (LTB)

- 4.5.6 LTB should promote Lesotho well in the Southern Africa media and be a very active member of the regional body – Regional Tourism Organisation of Southern Africa (ReTOSA) to attract some of the tourists to the region through cooperative marketing.
- 4.5.7 The LTB should get connected to the Internet and have a web site to provide Information on Lesotho unique country, water, good climate, nice people and pony trekking to visitors to the region.
- 4.5.8 LTB should educate Basotho about tourism and tourists for them to understand its importance and how negative activities to tourists and foreigners tend to negatively impact on tourism in Lesotho.
- 4.5.9 LTB, the government and the private sector and other tourism providers should team up to find ways and means of establishing good tourists and recreational facilities and shopping malls and complexes in Maseru. This should have recreational facilities and sports and games and braai stands some where near the Caledon River. The central park in Maseru should be secured and up graded also with up-to-date recreational facilities.
- 4.5.10 LTB and the government should as a matter of urgency try to establish the proposed Qeme Plateau National Park as a beginning on a small scale to attract local and foreign tourists.

4.5.11 The LTB should involve the local communities in all tourism initiative especially in the Cultural, Arts and Craft industries. The Arts and Cultural Festival organised at Morija between 1st and 3rd October, 1999 to the researcher was a very good beginning and this should be organised at least twice a year and be covered well in the foreign media. Cultural villages should also be established to promote the rich Sotho history and culture.

4.5.12 LTB should participate in fairs and exhibitions organised outside, especially in South Africa and promote Lesotho well at these exhibitions and fairs as they attract a lot of outsiders. A major one is the Tourism "INDABA" normally organised every year in South Africa.

4.6 SUGGESTIONS FOR FURTHER RESEARCH

The researcher recommends for research to be conducted on the possibility of profitably establishing the proposed Oxbow Skiing Resort as an all year round skiing resort despite the dismissal of the SKC study of its feasibility. There appears to be a lot of skiing enthusiasts from South Africa who go to Europe annually and to the Middle East on the sand dunes for this purpose.

Recommendation is made again for research to be conducted on eco-tourism and how this can generate income and maintain a fine balance between nature and modern infrastructure so that the fragile ecosystem is not harmed.

4.7 SUMMARY OF THE STUDY

This study looked at how Lesotho Highlands Water Project (LHWP) and the Lesotho Tourists Board) can market Lesotho as a tourists attraction and destination.

Chapter one looked at the historical overview of the tourism industry, the background problem, the problem statement, research questions, the objective of the study and research design and methodology.

Chapter two centered on the literature review, which reviewed studies done on the marketing of tourism in Lesotho in particular and tourism in general.

Chapter three of this study centered on the research design, methodology, data analysis and discussions based on the questionnaire, interviews and observations made by the researcher.

Chapter four made the summary from the study, came out with the findings and drew conclusions and made recommendations. The study was divided into four chapters.

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APPENDIX 1

QUESTIONNAIRE

The researcher, a student of Potchefstroom University for Christian Higher Education is conducting a research on Marketing the Lesotho Highlands Water Project Sites and Lesotho as tourist destination. I would be most grateful to you if you could kindly spare some few minutes to complete this questionnaire. All information supplied will be treated as confidential. The information will be used in writing a report, in partial fulfillment of the requirements for the award of a Masters Degree in Business Administration.

SECTION A

PERSONAL DETAILS

Please mark (x) where applicable unless otherwise specified

- 1 Sex: Male: Female:
- 2 Age: 15 – 24
25 – 34
35 – 44
45 – 54
55 – 64
65 and above
- 3 Married status: Married: Single: Divorced: Widowed:
- 4 Nationality
.....
- 5 Country of Permanent Residence
.....
- 6 Occupation:
.....
- 7 By what mode of transport do you enter Lesotho? (If you are from another country): Plane: Train: Car: Bus:

- 8 What is your purpose of visiting Lesotho? (If you are from another country)
 Holiday: Business: Other:
- 9 Where do you reside when you are in Lesotho?
 Hotel: Family House: Other:
- 10 What is your Annual Income? Less than 20000
 R20000 – R 40000
 R60001 – R 60000
 R80001 – R80000
 R100001 –R120000
 R120001 –R140000
 More than 140000

SECTION B

Foreign Tourist/Visitors

- 1 Have you ever-visited Lesotho before? Yes: No:
 If yes what was the purpose of your visit:
 Holiday: Visit: Business: Other:
- 2 How did you hear of Lesotho? Media: Previous Visitors:
 Internet: Other:
 Please Specify:

- 3 Have you ever heard of the Lesotho Highlands Water Project? Yes:
 No:
- 4 Have you ever visited the Lesotho Highlands Water Project (LHWP) development sites? Yes: No:
 If yes, what attracted you to the sites (Please) list them:

- 5 Please list tourist attractions that attract you most:

- 6 Which other places did you visit in Lesotho?

.....

 7 How many days do you intend spending in Lesotho as a tourist

8 Which of these activities and facilities do you prefer? (You may choose more than one)
 Modern Complexes
 Adventure
 Cultural Activities
 Historical Sites
 The Country Sides

9 How do you assess Basotho and their relationship with tourist:
 Very Friendly: Friendly: Less Friendly:

10 Are there adequate facilities for tourists in Lesotho? Yes:
 No:

11 What interested you at the Lesotho Highlands Water Project (LHWP) sites?
 (Please list the activities)

12 Is there enough information on Lesotho/Lesotho Highlands Water Project (LHWP) tourist sites for tourists?
 No: Yes:

13 How do you assess Lesotho's tourism offer in relationship with its regional competitors on the following?

	Very Good	Good	Fair	Not Fair
Prices				
Variety				
Value for money				
Service Quality				
Access to place				
Security				

14 Were your expectations met? Yes: No:

15 Would you visit the LHWP sites again? Yes No:

16 Would you recommend the LHWP/Sites/Lesotho to others?

Yes: No:

- Why or why not

17 Could you make any recommendations to LHDA/LTB for improvement?

THIS PART SHOULD PLEASE BE ANSWERED BY OFFICIALS FROM (LHDA; LTB; MINISTRY OF TOURISM; HOTELS, TOUR OPERATORS where applicable).

1 From which countries do most of your tourists come from? (List 4 main countries in order of numbers).

- i)
ii)
iii)
iv)

2 By what means do the tourist arrive in the country?

Cars Train Bus Other

3 Who are the people who visit Lesotho Highlands Water Project sites?

4 What activities do they prefer in most cases when on visits in Lesotho/LHWP sites?

SECTION C

THIS PART SHOULD PLEASE BE ANSWERED BY RESIDENTS IN LESOTHO

1 Do you normally go on holidays? Yes: No:

2 If yes where do you normally go to?

3 If you spend your holidays outside Lesotho, Why?

4 What activities do you prefer to engage in when on holiday? (Please list them)

5 Have you heard about the Katse Dam and Mohale development areas?
 Yes No

6 If yes, have you been there before? Yes No

7 If yes, how did you hear of it?
 Radio Television
 Other Specify

8 What activities interest you most at the LHWP sites (Please list them)

9 What activities should the Lesotho Tourists Board and Lesotho Highlands Water Project add to make you to spend your holidays in Lesotho (Please list them)

10 Is tourism being promoted adequately in Lesotho? Yes No

11 Which of the following do you normally listen to/ watch/read?
 Radio Television Magazines Daily Papers Other

Thank you very much for you time and cooperation.

APPENDIX B

INTERVIEW SCHEDULE/ GUIDE FOR OFFICIALS OF ORGANISATIONS PROVIDING TOURIST SERVICES AND FACILITIES.

PRESENT POSITION: _____

NUMBER OF YEARS WORK EXPERIENCE FOR YOUR ORGANISATION: _____

1. Which organisation do you work for?
2. What services/ activities/ facilities do you provide for your tourist? (Please name them): _____

3. @ Do you usually promote your organisation and its activities?

YES

NO

- (b) If no why?: _____

- (c) If yes list the most frequently used promotional tools used.

(Advertisements / Public Relations/ Publicity/ Personal sales/ other

specify) _____

- (d) Why do you prefer using these tools?

4. (a) Do you agree that there are many partners involved in tourism industry?

YES

NO

- (b) If yes, do you cooperate with each other to attract tourist and meeting

- their needs? _____
- (c) What form of cooperation do you engage in with others?

- (d) Are you a member of any national / regional body?
YES NO
Specify if yes: _____
5. (a) Do you use the South African media in your promotions
YES NO
- (b) Why? _____
6. (a) Do you promote tourism, places and activities to Lesotho residents?
YES NO
- (b) Why? _____
7. (a) Do you provide adequate information for your customers and potential customers?
YES NO
8. (a) Are you linked to the internet?
YES NO
- If No why? _____
9. (a) Do you have any official mouth piece for promoting your activities.
YES NO
- (b) If _____ No
why? _____
10. Name five activities/ services/ facilities in your opinion Lesotho and other providers are very good at in offering tourist and holiday makers:

11. Do you take part in exhibitions especially in South Africa and other parts of the world?

YES NO

12. (a) Do you think Lesotho needs a well established game reserve?

(b) Why? _____

13. What image in your opinion should Lesotho project to the world as a tourist

Attraction _____ country

14. How will you rank the Basotho and their perception of the importance of tourist to the economy?

Very Good Good Fair Not Fair

15. (a) Do you think there need for proper education of Basotho on tourism and tourists?

YES NO

Why? _____

Thank you very much for your cooperation.