



Cape Peninsula
University of Technology

**THE SUSTAINABILITY OF PINK TOURISM BUSINESSES IN CAPE TOWN:
TRANSITIONS TO THE MAINSTREAM LEISURE MARKET**

by

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A handwritten signature in black ink, appearing to read 'K. LAWRENCE', written in a cursive style.

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Date

ABSTRACT

The lesbian, gay, bisexual and transgender (LGBT) tourism market, also known as 'pink tourism', had developed into a niche market in Cape Town. With the adoption of a new Constitution, the rights of all South African citizens were recognised, including gay rights. South Africa hosted the World Cup soccer tournament in 2010, thrusting the city into the international tourism market. The recognition of the economic contribution by the South African Department of Tourism resulted in the development of a tourism framework to guide the industry. The Western Cape developed a tourism framework to grow the economy and create jobs in different niches. Within the niches, pink tourism emerged as a niche in an area called De Waterkant in Cape Town. This became known as the gay village in Cape Town, a first for the African continent. The gay village flourished, with bars, clubs, restaurants, guest houses and saunas attracting locals and tourists from all over the world. Events supporting this niche were the Mother City Queer Project, Out in Africa film festival, Mr Gay World, and the Gay and Lesbian Travel symposium. As the niche became saturated, change saw gay tourists holidaying elsewhere and the gentrification of the gay village. Businesses closed and some moved; however, those that remained have had to review their business strategies for sustainability. The research explores how tourism businesses within the pink niche might have transitioned to compete in the mainstream leisure market.

The aim of the study is to explore how the pink tourism business sector can diversify and expand its niche product offering to transition into the mainstream leisure market for long-term sustainability. The transition may be evidenced by changes in the marketing mix through product, price, place and promotion that appeal to the LGBT individual and broader mainstream leisure market. The researcher conducted a qualitative study through a purposive sample method with twelve pink businesses in the De Waterkant and Atlantic seaboard area in Cape Town. Semi-structured interviews were conducted with owners or management. The findings revealed that most businesses had transitioned to the mainstream leisure market, with a few that continue to operate within the pink and mainstream market simultaneously. In terms of implications, this study provided confirmation that there is a need for gay leisure spaces, whether exclusively gay or gay friendly, with some outside the general borders of a gay village defined as businesses serving the LGBT sector which are gay or not gay owned. It was able to describe the current state of the pink niche and its transition to the mainstream market. It was further able to illustrate government and regulatory bodies could engage with the business environment to better understand the niche and what planning is required to bring the niche into the tourism industry to work as a collective. The

key findings of the study not only advances the understanding of the state of the pink niche and the possibility of growth as an forgotten tourism niche market, it also makes recommendations that a combined approach of business and regulatory bodies would be important to re-establish relationships to market the pink tourism and mainstream sector effectively. This would provide direction for future research for long-term case studies of pink niche businesses that have transitioned or are in the state of transition and an opportunity to research the demand-side perspectives of pink niche transitioning from the perspective of travellers.

In closing the gap of knowledge, this study contributes to the future development and sustainability of the industry, resulting in South Africa remaining competitive as a destination of choice for the local and international market.

Key words: niche market, pink tourism, LGBT, gay, sustainability, transition, mainstream, pink village, niche tourism, marketing.

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LIST OF ABBREVIATIONS

ANC	African National Congress
CCT	City of Cape Town
COGS	Cape Organisation of Gay Sport
CTT	Cape Town Tourism
CTICC	Cape Town International Convention Centre
DMO	Destination Marketing Organisations
DEDAT	Department of Economic Development and Tourism
DINK	Double income, no kids
GALACTTIC	Gay and Lesbian Association of Cape Town Tourism Industry and Commerce
GHMCC	Good Hope Metropolitan Community Church
GDP	Gross Domestic Product
DTI	Department of Trade and Industry
GVA	Gross Value Added

LGBT	Lesbian, Gay, Bisexual and Transgender
LGBTI	Lesbian, Gay, Bisexual, Transgender and Intersex
LGBTIQ	Lesbian, Gay, Bisexual, Transgender, Intersex and Questioning
LGBTIQ+	Lesbian, Gay, Bisexual, Transgender, Intersex, Questioning and other
MCQP	Mother City Queer Project
MSM	Men who have sex with men
MOU	Memorandum of Understanding
MICE	Meetings, Incentives, Conferences and Events.
NGLCC	National Gay and Lesbian Chamber of Commerce
NGO	Non-governmental organisation
PSP	Provincial Strategic Plan
SAGLTA	South African Gay and Lesbian Travel Alliance
SA	South Africa
SAT	South African Tourism

SLEPT	Social, Legal, Economic, Political, and Technological
SMME	Small and medium enterprise
V&A	Victoria and Alfred Waterfront
WC	Western cape
WCG	Western Cape Government
WTM	World Travel Market

CLASSIFICATION OF KEY TERMS AND CONCEPTS

Term	Explanation
City of Cape Town	Cape Town, in the City of Cape Town metropolitan municipality, Western Cape, is the legislative capital and is where South Africa's Parliament is found. (South African Government, 2020).
Cultural Tourism	Things that are of interest to a visitor including traditions of people, their heritage, history and way of life (City of Cape Town, 2009).
GDP	The monetary measure of the market value of all the final goods and services that is bought by the final user produced in a period of time (a quarter or a year) (IMF, 2020).
GVA	The value of output less the value of intermediate consumption, a measure to the contribution of GDP made by an individual producer (OECD, 2020).
Mother City Queer Project	Cape Town-based organisation that hosts an annual queer costume party held in December, featuring a new theme each year (Venske & Hattingh, 2012:1).
Pink Tourism	Tourism activities that cater and includes lesbian, gay, bisexual and transsexual persons (UNWTO, 2012:23).
Tourist	A domestic or international visitor (domestic, inbound or outbound) is classified as a tourist (or overnight visitor), if his/her trip includes an overnight stay, or as a same-day visitor (or excursionist) otherwise (Department of Tourism, 2011:10).
Tourism	The activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited. (Department of Tourism, 2011:10).

**United Nations
World Tourism
Organization**

The agency responsible for the promotion of responsible, sustainable and universally accessible tourism. It serves as a global forum for tourism policy and a source of tourism know-how (UNWTO, 2014a).

**Western Cape
province**

The Western Cape is a province of South Africa, situated in the south-western part of the country (South African Government, 2020).

CHAPTER 1: INTRODUCTION

1.1 Introduction

This section seeks to provide an overview of the study. In the tourism industry, people travel to various destinations driven by a variety of motivations. The industry can be divided into two main areas: mass tourism and niche tourism (City of Cape Town, 2009:32; Department of Tourism, 2020a:21). As South Africa entered the international arena after its first post-apartheid elections with an inclusive Constitution, the tourism industry boomed owing to international interest (Hattingh, 2019:136). As part of this competitive environment, businesses flourished to cater to different niches in the tourism industry. As time passed and changes in societal attitudes emerged, the pink tourism niche market has changed as the market has transformed to be inclusive. Business owners were presented with the challenge of how to become inclusive and survive in the growing tourism industry.

According to the latest national tourism plan, tourism is a major contributor to the South African economy (Department of Tourism, 2017a:1; Department of Tourism, 2020a:21). From a South African perspective, tourism has been recognised in the economic sector to spur global economic recovery by being a driver of growth and development by the South African government (Department of Tourism, 2011a:7; NT, 2020b:10). In 2015, the United Nations World Tourism Organization (UNWTO) agreed upon 17 Strategic Development Goals to guide the industry until 2030 (UNWTO, 2017a:6). These included gender equality, strategic partnerships, goals, decent work, and economic growth among others. International tourism in Africa was at 4.2% in 2019 with a predicted growth between 3 to 5% in 2020 (UNWTO, 2020:4). Through the Working for Tourism Programme, 4 558 full time jobs were created in the tourism sector for the 2019-2020 year (Department of Tourism, 2020b:54). With the Western Cape situated at the southern tip of the African continent, world heritage sites, wine estates, and diverse flora and fauna, the tourism sector accounts for 9.3% of the Gross Domestic Product (GDP) of South Africa (SA) and employs 9.8% of the province's workforce (Smith, 2018). The tourism spend in the Western Cape was R23 billion with 1 727million international tourist arrivals. The domestic spend was R1.6 billion in the province. The sector is responsible for creating a total of 300 000 jobs with a total spend of R23 billion by international tourists (South Africa Government, 2018). The creation of jobs was in line with the aim of alleviating poverty (Bhorat & Kanbar, 2006:7). Tourism's contribution to the economy is driven by both mass tourism and more specialised niche tourism markets or

sometimes referred to as alternative tourism (Lertcharoenchoke, 1999:24; Pearce, 2016:15). The latter include the 'pink' tourism market, a niche that caters to the needs of lesbian, gay, bisexual and transgender (LGBT) consumers. This market has demonstrated growth over the past two decades and has drawn the attention of academics who have investigated its development (Visser 2002, 2003a, 2003b, 2014; Elder, 2004; Rink 2008, 2013, 2016; Venske & Hattingh, 2012). Despite the growth, there has been little attention devoted to it by local business, government agencies and entrepreneurs.

The growth and development of the pink tourism market had much to do with the political, social and economic transitions of South Africa itself. As one of the vital contributors to a growing economy government embarked on range of tourism development programmes to support the industry (Department of Tourism, 2020b:40). The government sought to recognise all citizens by forging an equitable, democratic, non-sexist and non-racist society (Visser, 2002:85), thereby paving the way for economic growth as well as social change. The changes that came about in tourism were set within the process of globalisation that promised growth in employment, the spread of knowledge, and the improvement of social standards. Through the integration of world views, products, ideas and culture, globalisation claims that it promotes economic growth, creates jobs, makes companies competitive, and expands consumers choice, while lowering prices (Dwyer, 2015:329-326). Globalisation and the growth of mass tourism gave rise to niche tourist markets where tourists sought unique experiences in line with their identities and lifestyles (Browne & Bakshi, 2011:179; Department of Tourism, 2020b:48). Niche tourism markets emerged from the process of globalisation within a marketplace characterised by increasing homogenisation of culture, ideas and leisure activities that encouraged individuals to seek unique opportunities (Ali-Knight, 2010:14). Increasingly, mass tourism is making way for niche and micro tourism markets which cater to individual needs and preferences (Burns & Novelli, 2006:6; UNWTO, 2017b:65). The self-actualising motivation of tourists within the mass market of globalisation saw niche markets diversify and grow (Ali-Knight, 2010:15). Niche tourism speaks to diversity and ways of marking one's difference (Robinson & Novelli, 2005:1; UNWTO, 2017b:60). Through identifying this differentiation it's a means of ensuring individuals expectations, needs and wants are met (WCG-DEDAT, 2002; UNWTO, 2017b:27). Niche tourism is a way of stimulating further growth in the tourism sector (CCT, 2009:32; Cape Town Tourism, 2018a:2).

Pink tourism was an early focus of the City of Cape Town's tourism's marketing efforts and the niche grew to a peak in the early 2000s when Cape Town's De Waterkant area (commonly known as the pink village) was seen by some as the heart of Africa's gay capital (Visser, 2003b:174). Although De Waterkant is not the focus of this study, the enclave has been an important site for the growth and development of the pink niche. De Waterkant is a concentrated area where businesses marketed their services and products to LGBT individuals and communities. In Cape Town, the gay tourism industry flourished with a cluster of gay-focused businesses opening in the De Waterkant area (Visser; 2003a:90; Rink, 2008:206). In the first 2012 UNWTO LGBT report, it was estimated that approximately 10–12% of tourists to Cape Town were from the LGBT market (UNWTO, 2012:23). This indicated that the niche market was thriving economically, especially at a time when the need arose to grow the economy. As time passed and the attraction of the gay village gained momentum with not only local gay people frequenting the village, heterosexual people also started visiting the De Waterkant area. Businesses in the area started changing in an attempt to capitalise on the thriving market. This changed the gay space that once was identified as a gay village. Gay people started socialising in different places and businesses needed to relook at their offerings and how to change their marketing strategies (Rink, 2016:29). As pink businesses started closing or moving from the area owing to developments, the pink village changed, with new residential properties for foreigners, office complexes, cafés and boutique hotels developed (Visser, 2014:474).

As societal attitudes toward LGBT individuals become more accepting, increased social inclusivity has arguably made an impact on the pink niche market (The Other Foundation, 2016:15, 2017:6). The changes have led to the evolution of places such as De Waterkant that served as the centrepiece of pink market tourism in Cape Town (Visser, 2014:477). Over the years, the pink market and its value as one of the main economic contributors within the GDP of SA have been overlooked by potential investors (The Other Foundation, 2017:6). In addition, the sector has failed thus far to attract widespread local or international investors to accelerate it into the mainstream income for Cape Town according to a niche study conducted by the City of Cape Town (CCT, 2009:179).

The purpose of this study is to determine the current state of the pink tourism market and how businesses may transition to the mainstream market for sustainability purposes. By identifying and understanding these businesses, this study provides valuable input to the pink tourism industry, thereby ensuring continuous growth in the tourism industry and growing the economy.

The transitioning of pink tourism businesses from a niche to a mainstream market in Cape Town remains unclear. The gap in the literature provides an opportunity to understand the sustainability of the pink tourism market into the mainstream. The combination of these transitions and the gap in literature inform the aim of the research.

Throughout this study, the abbreviation LGBT is used to refer to individuals and communities who identify as lesbian, gay, bisexual or transgender. This is consistent with the use of the abbreviation by the UNWTO and includes a broad spectrum of demographics of LGBT people. They are recognised as diverse and heterogeneous as the larger general population (UNWTO, 2017b:40). In recent UNWTO global reports on LGBT Tourism (UNWTO, 2017b:14), the abbreviation LGBT is used to refer to tourism catering to lesbian, gay, bisexual and transgender individuals and communities. For purposes of this study, the term 'pink tourism' is used, referring to tourism activities that cater to LGBT tourists. Throughout the study, respondents and literature refer to LGBT individuals and communities using a variety of abbreviations that intend to reflect the diversity and inclusiveness of sexual non-conformity. These include: LGBTI which stands for lesbian, gay, bisexual, transgender and intersex, and LGBTQI+ referring to lesbian, gay, bisexual, transgender, questioning, intersex and other.

1.2 Background to the Study

1.2.1 The Pink Tourism Market

The City of Cape Town (CCT) recognised the importance of niche markets and their economic impact because of premium expenditure after conducting its first detailed market assessment (CCT, 2002) and later commissioned a study on niche markets (CCT, 2009) to review the identified tourism niche sectors. Assessments were done on these markets through profiling, common segments, understanding product consumption, and identifying the infrastructure required to support the attraction of visitors (CCT, 2009:25). On a national level there has also been recognition and support for LGBT tourism by SA's then minister of tourism (Smith, 2016). These findings will form the basis for future tourism development initiatives, product plans and priorities in Cape Town. Further, tourism studies bolstered the belief that the pink tourism market represented a growing and increasingly diverse and global market to invest in. It was noted that not only does this niche market travel far and regularly, gay visitors are lucrative in terms of

spending power owing to being single and having a larger disposable income (Southall & Fallon, 2011:219; The Other Foundation, 2017:7; UNWTO, 2017b:41). In the case of Cape Town, the city first engaged with the gay tourism market in three principal ways (Tebje, 2002, cited in Venske & Hattingh, 2012): through a pink visitor's map, *The Pink Map* (Rink, 2008:73); a gay section in the official visitors guide to CT; and representation of CT's gay tourism industry on international bodies such as InterPride International.

1.2.2 Roles of the Pink Tourism Market

The pink tourism niche provides leisure products and services to travellers who identify as LGBT, LGBTI, LGBTQI and LGBTQI+. Pink tourism businesses fulfil a niche in the tourism sector where consumers demand specialised products and services that align with their identity and values. This niche allows LGBT people to participate in the tourism sector as consumers (Robertson & Novelli, 2005:5; UNWTO, 2017b:66; Rink, 2019:183).

1.2.3 The Influence of the Pink Tourism Market

The buying power of the pink market in South Africa alone is estimated between R53 and R204 billion (The Other Foundation, 2017:9). LGBT tourism focuses on the niche market in South Africa with not only exposure to gay tourism, but also other niche markets for businesses in tourism. In order to understand contemporary transitions in the niche, a chronological account of events is helpful. The impact of the pink tourism market was demonstrated in the early years of the new South Africa through major events drawing visitors from around the world (Hampton, 2004:10). In 1994 Cape Town hosted its first Mother City Queer Project (MCQP), celebrating freedom based on sexual orientation and the recognition of LGBT people. The first themed party, called 'The Locker Room Project', was designed to celebrate gay culture in the form of fancy dress in ultra-lush venues. The year the 'Toy Box' themed party was held, the event generated R50 million from a single night, when compared with the Argus Cycle Tour which took in almost half that amount in revenue (Southall & Fallon, 2011:225). This is a regular event on the holiday calendar, held in December annually during the summer holiday season with attendees travelling from all parts of the world. The MCQP's audience extends beyond gay people and includes heterosexuals, with a total number of 3500 people attending in 1994 to 8000 in 2005 (Venske & Hattingh, 2012:382). Another event hosted annually in May since 2000 is the Pink Loure Mardi Gras hosted in Knysna on the Garden Route. According to *Classic Encounters* (2015), the event is host to 5000 visitors with a revenue of R9 million. The revenue income from the LGBT events are viewed as additional

income for the city and creating employment. Cape Town received international recognition by hosting the International Gay and Lesbian Travel Association (IGLTA) symposium, the first time ever in Africa (Visser, 2002:89). Soon Cape Town was competing with major cities like London, San Francisco and various European cities owing to hosting the symposium.

1.2.4 Challenges in the Pink Tourism Market

In Cape Town, the gay tourist industry flourished with a cluster of gay-focused businesses opening in the enclave of De Waterkant which commonly became known as the gay village (Elder; 2004:585; Visser, 2003a:90; Rink, 2008:206). As time passed and the attraction of the gay village gained momentum with not only local gay people frequenting the village, heterosexual people also started visiting the De Waterkant area. Businesses in the area started changing in an attempt to capitalise on the thriving market. This changed the space that once was identified as a gay village. The acronym DINKS (double income, no kids) was adopted, referring to same-sex couples as optimal consumers with gay men being the bigger spenders compared with their lesbian counterparts (UNWTO, 2012:8). Gay people started socialising in public spaces beyond identity-based spaces, and thus businesses needed to review their product offerings and change their marketing strategies. With the closure of pink market businesses in the midst of the redevelopment of De Waterkant in 2008, the former heart of the gay capital of Africa (Visser, 2003a:87) began to transform into a place for residential homes for locals and foreigners, retail shops, restaurants, cafés, office space and boutique hotels (Visser, 2014:476; Rink, 2016:22).

1.2.5 Characteristics of the Pink Tourism Market

LGBT consumers are profiled as high-income earners who travel internationally without being restricted by financial concerns (UNWTO, 2012:8; The Other Foundation, 2017:7; UNWTO, 2017b:42). As a consumer sector they travel annually, if not twice a year, while tour companies target them through customised tours. They are either single, married with no children, or DINKS. Travel destinations are determined by countries that recognise the LGBT community, creating a feeling of safety and a protected holiday environment (UNWTO, 2012:10; UNWTO, 2017b:80-81). The emerging trends are interests in destinations that offer same-sex wedding venues and honeymoons, in addition to a sense of respect, diversity and inclusivity.

1.2.6 Changing Social Attitudes and Shifting Market Needs

Given the impact of tourism and the shift in society, niche markets are more important than ever to cater to the requirements of individual tourist demands and motivations. However, the pink niche market is more susceptible to change, given society's attitudes towards sexuality (Visser, 2002:88; Rogerson & Visser, 2005:70; The Other Foundation, 2016:41). As a result, the pink tourism niche market may be required to change its marketing strategies to adapt and cater to a wider audience of tourists (Fiddler, 2019). Vorobjovas-Pinta and Hardy (2016:414) argue that the combination of societal and legislative changes impact how LGBT travellers engage with the pink tourism niche while on holiday. Their argument is further supported in a South African context by Visser (2014:474), who highlights the consumer changes in De Waterkant and attitude changes, and by The Other Foundation (2016:8), who mark critical changes in South African attitudes towards LGBT individuals and communities.

The suggested additional reasons for shifts in attitude are:

- Visibility through social media:
Common issues on social media platforms and the 'coming out' of others create a sense of confidence for those wanting to come out to family, work colleagues and friends.
- Changing family structures:
Changing Concepts of traditional family structures through divorce, adoption and same-sex partners.
- LGBT lifestyles and visibility at work:
Social media, changing social attitudes and workplace policies recognising the rights of LGBT persons.
- Changes in the laws of countries:
Changes in countries' laws and policies addressing discrimination and human rights in the recognition of LGBT persons (UNWTO, 2017b:71).

1.2.7 Sustainability in the Pink Tourism Market

Through the Western Cape Government (WCG) and the City of Cape Town, WESGRO has the mandate to sustain tourism activities in the province, which are:

- To provide tourism, trade and investment marketing assistance to anyone requesting advice.
- To act as a tourism, trade and investment promotion agent on behalf of the province.
- To develop, implement and promote a provincial tourism, trade and marketing strategy and implement projects that contribute to the growth in economy of the province (WCG-DEDAT, 2018:99).

The three entities sustain tourism broadly without specific focus on the pink tourism niche.

Driven by the international growth in tourism (UNWTO, 2016:11; Department of Tourism, 2020a:14), WESGRO in its strategic plan has recognised tourism as key to growing the Western Cape's economy, creating jobs and for the future livelihood of the economy. This is evident in the priority sectors' focus on increasing air routes into Cape Town, hotel development, and halal tourism (WESGRO, 2017:8-9,16). To accommodate the anticipated number of arrivals, whether for work or leisure, it is important to ensure the tourism market, whether niche or mainstream, can sustain itself to accommodate the predicted growth in tourism. The focus of the study will be on LGBT businesses that had transitioned to the mainstream market for sustainability.

1.3 Problem Statement

While the pink tourism market has grown and developed (Visser, 2002, 2003a; Elder, 2004; Rink, 2008, 2013), society's attitudes toward the individuals and groups that encompass the pink market have also changed (The Other Foundation 2016:55). These market transitions are supported by Visser (2014), who identifies the shifting terrain of the urban leisure landscape in De Waterkant for pink consumers, while The Other Foundation's survey (2016) of attitudes towards homosexual and gender non-conforming citizens reveals a change in societal attitudes in South Africa (The Other Foundation, 2016:3). As the global report on LGBT tourism by the UNWTO notes that legislation has changed in countries to be inclusive of gay citizens, the question remains 'how markets worldwide respond to the need for inclusivity' (UNWTO, 2012:10).

The research problem is that a gap exists in understanding how pink tourism businesses navigate changes in society and the needs of LGBT consumers. This study seeks to understand potential shifts in marketing practices of pink tourism businesses from a niche tourism market to the mainstream leisure market. The transition may be evidenced by changes in the marketing mix through its product, price, place and promotion that appeal to the LGBT individual and broader

mainstream leisure market (Masterson & Pickton, 2014). This study provides insight and information to guide business owners, stakeholders and government for sustainability in the pink tourism industry.

In closing the gap of knowledge and understanding the pink tourism market, the study contributes to the future development and sustainability of the industry, resulting in South Africa's remaining competitive as a destination of choice for the local and international market. No previous studies have been conducted on the sustainability of pink tourism businesses. This study is thus envisaged to contribute to the field of study in sustaining tourism. The transitioning of pink tourism businesses from a niche to a mainstream market in Cape Town remains unclear as no previous studies has been concluded.

1.4 Research Aim and Objectives

1.4.1 Aim

The aim of the study is to explore how the pink tourism business sector can diversify and expand its niche product offering to transition into the mainstream leisure market for long-term sustainability.

1.4.2 Objectives

From the problem statement and research aim, the objectives of the research are to:

- determine the current state of the pink tourism market in Cape Town
- identify a subset of service providers in the pink tourism sector that have transitioned to the mainstream market, exploring the marketing strategies adopted
- explore the synergies between pink tourism and the mainstream leisure tourist market in Cape Town
- determine the barriers to growth in the pink niche tourism sector
- consider the viability of pink niche tourism in the context of social change in South Africa

1.4.2.1 Theoretical Objective

The research findings contribute to a gap in knowledge in the pink tourism sector by providing information on how the market has changed. The study could be of value to businesses in the pink tourism sector such as accommodation providers, clubs, bars, theatres and restaurants. The

objective is to understand theoretically how societal change and attitudes impact on marketing. The study further provides more general insights into understanding the relationship between marketing and society.

1.4.2.2 Empirical Objectives

Through qualitative methods, the empirical objectives are to conduct a survey and collect data from a representative subset of businesses in the pink tourism sector in Cape Town. The businesses were identified in pink publications such as *The Pink Tongue*, *Gay Guide to Cape Town*, and *Cape Town Tourism*. Further information was sourced in pink publications for the pink community and on websites. Pink businesses in the accommodation, nightlife and restaurant industry were targeted as they seem to have sustained themselves and are larger in terms of choice and variety. The marketing mix (Twin, 2020) was used to explore business practices in terms of product, price, promotion and place when selecting participants.

Participants in the study are a subset of service providers in the pink tourism sector that have transitioned to the mainstream market. Interviews were scheduled ahead of time with a follow-up telephone call or email for confirmation. The time allocated was 45–60 minutes per interview, which was scheduled with the participant beforehand. The suggested venue was the place of business or what was convenient for the participant. The researcher was flexible with time and guided by the participant's choice. The most senior persons were interviewed, taking into consideration their position in the business. In most cases, the participants were the owners of the business. The focus was on businesses that started as a pink business in the pink niche sector.

1.5 Significance of the Study

This study is significant and could be of benefit to pink niche tourism businesses in Cape Town and wherever pink niche tourism exists. The pink tourism market has changed owing to societal attitudes and acceptance of LGBT persons, thus impacting on the tourism sector and tourism marketing strategies. The question is, how have businesses identified marketing strategies to transform from a pink niche market to the mainstream market? As these businesses have employed people and invested in staff skills development, how is that experience reinvested in

the larger tourism market? This study will support the sustainability of businesses, which is attainable by economic growth (Department of Tourism, 2017a:8). There is a lack of research that focuses on the transition of business from pink niche tourism to the mainstream leisure market. These research findings could be a reference tool for small businesses in the future planning of their marketing strategies and for the tourism industry in general.

1.6 Research Methodology

1.6.1 Exploratory Research Design

An exploratory research approach was undertaken to gain information on how the pink tourism sector can sustain its niche product offering while expanding into the mainstream leisure market, and to ascertain opinions and obtain any relevant information from the rest of the industry within the pink tourism sector. This design approach helps to gain an understanding of a decision-making environment (Erickson, 2017:30). Empirical data was drawn from a sample of nightlife venues, accommodation and restaurants, mainly situated in De Waterkant, Sea Point in central Cape Town. Several businesses that originally opened as pink businesses are still situated in these locations. Most businesses are privately owned, so the opportunity to access personal experiences in the interviews was possible (Visser, 2014:474-477).

1.6.2 Qualitative Research of Targeted Population

The research took a qualitative approach as this approach allowed the researcher to get an inner experience of participants in the workplace, understand their meaning in responses relating to work experience and their views of the industry, and how the tourism industry has changed (Silverman, 2020:3). The in-depth interviews were the primary data-collection technique and included open-ended questions in trying to solicit as much information as possible. The approach allows one to adopt a more fluid, evolving and dynamic approach (Corbin & Strauss, 2008:12-13), as the focus was to extract information, sometimes of a sensitive nature. The approach was appropriate as it allowed the researcher to engage face to face with professionals who work in the pink tourism industry. The aim was to gain information on pink tourism businesses about business strategies, aims, current and future marketing strategies, opportunities, and any information relating to the aim and objectives of the study. Participants from different types of

businesses in the pink tourism industry were interviewed to determine any commonalities and patterns in the responses.

1.6.3 Sampling

The sampling method was purposive across a range of businesses from the pink sector in the form of interviews with participants identified through IGLTA, *The Pink Tongue*, *Gay Guide to Cape Town* and Cape Town Tourism (Creswell, 2014:189). A target of 12 interviews was set and achieved with a cross-section of participants in the accommodation, nightclub, bar, restaurant and theatre industries. Further information was sourced in pink publications for the LGBT community. The reason for selecting these organisations and publications is because the businesses in the pink sector advertise or are affiliated with the pink tourism sector. The sample ranged across elements of the tourism destination amalgam (Cooper et al., 1998:105), were attractions and amenities. The destination amalgam identified by Cooper et al, (1998) and later used specifically for destination marketing by (Buhalis, 2000:98) is used as a means of understanding a tourism destination and its various sectors.

The factors taken into consideration when selecting the participants for the study were, and were not limited by, the type and sector of businesses, grouped into three categories:

- Hotels and guest houses – these are in the CBD of Cape Town, De Waterkant, and Atlantic Seaboard, where the accommodation businesses are located.
- Clubs, bars and theatres – in the CBD of Cape Town, De Waterkant and Atlantic Seaboard.
- Restaurants and cafés – in the CBD of Cape Town and De Waterkant.

1.6.4 Data-Collection Techniques

The data-collection techniques included in-depth, semi-structured interviews scheduled at a venue comfortable for the participants. The list of semi-structured interview questions consisted of four main themes relating to the objectives of the study. Under the themes, a list of related, open-ended questions was prepared. All interview venues were selected by the participants, mostly their place of work. The interviews were scheduled for 45 minutes per participant at a time convenient to them. Clarification of the interview process was given before the questionnaire was

explained, the consent form signed, and responses recorded. Participants were encouraged to include any additional information relating to the questionnaire or where they felt information would add value. The trustworthiness, creditability and reliability had been established in sampling techniques which ensured participants were either owners or managers of the sampled business. Participants were informed of confidentiality and anonymity when the interview was scheduled, and when signing the consent form.

1.6.5 Semi-Structured Interviews

Primary data collection included semi-structured interviews as they provided comparable qualitative data which is reliable (Cohen & Crabtree, 2006). This technique also allows participants the freedom to express their views in their own terms and also relate their experiences in the tourism industry. Interviews were interactive (Maxwell, 2005) allowing for a more personal relationship to develop, allowing for information to be shared that wouldn't normally have been. The questions were prepared ahead of time, allowing me to be prepared and competent during the interview without distractions, but at the same time the semi-structured interviews allowed for the interviews to take new directions based on participants' responses. Data was collected through 12 scheduled face-to-face semi-structured interviews conducted with each participant. A minimum of 12 participants were interviewed from pink businesses in the identified sample set (see Chapter 4, Section 4.1.5). The questions were a balance of probing and open-ended questions to elicit further information. Using semi-structured interviews with predetermined questions guided the process but also allowed participants to expand where necessary. The interviewer can also probe with a follow-up question or seek clarity on a particular question (Marshall & Rossman, 2006:58). The interviews were conducted in English in a venue of participants' choice, allowing them to feel in control of information provided and to be put at ease (Schmidt, 2004:254). Interviews were recorded with the participants' permission and transcribed for analysis. Once all interviews were completed, an in-depth case study was conducted of a single business to explore trends and marketing strategies, as well as the synergies between LGBT and mainstream leisure businesses. The pink tourism business for the case study analysis was chosen based on its characteristics of an LGBT business that had transitioned to the mainstream leisure market.

1.6.6 Data Analysis

A thematic analysis which pinpoints, examines and records themes was used by sifting through data looking for patterns across data collected (Braun & Clarke, 2006:78). The framework of analysis was developed through the literature review, using key themes. The data was analysed at a micro level (all participants) and at a macro level (government data at provincial level).

Analysis of data was used following Creswell's phased process of data analysis as noted below (Creswell, 2014:152):

1. Organise and prepare data for analysis

This process comprises transcribing interviews, typing up notes captured, and sorting and arranging information data into different types based on sources of information.

2. Read through all data

In this process, one gets a general sense of information provided, patterns start emerging from what participants are saying, and the credibility of information is validated. Reference is also made to notes taken during the interview.

3. Coding

This is organising the data by breaking it into chunks by creating a table. Commonalities are identified and clustered. The topics are allocated codes with descriptions, and a pattern should emerge with codes, or new ones will appear.

4. Themes and analysis

In this step, a description of the themes and analysis is established. The description is detailed regarding information on the LGBT businesses, revealing or looking for themes or categories. The themes that do appear are used as headings in the findings sections of the research and may display multiple layers from which further analysis can be derived. A narrative is the presentation of findings of the analysis grouped in chronological order with themes and subthemes, and how they may or may not interconnect. The four steps of Creswell's data analysis spiral are observed through organising, perusal, classification and synthesis.

5. Findings of analysis

In the analysis of the data, the most popular way to present it is in the form of narrative. This is organised in a chronological order with themes and sub-themes, and may reveal further interconnecting of themes for further discussion. Tables are the most popular way of illustrating the process further.

6. Interpret the larger meaning of the data

Under this heading, the lessons learnt, and the essence of the data collected. Findings or suggestions could derive from making comparisons of information collected or readings of

published information. It could also result in further questions revealed by the data and the analysis, which could have been foreseen.

The data collected was transcribed into notes, the interviews were collated into individual reports by a professional transcription company. Additional information was gathered by the researcher's attending the World Travel Market held in Cape Town. An analysis was done, searching for patterns or trends in the information provided, followed by a textual explanation of the analysis. The research could provide possible solutions to and suggestions for how the pink tourism industry sustains itself in the tourism industry. New methods of business processes for sustainability and transformation could be revealed including the limitations of the study.

1.7 Chapter Outline

The chapter outline provides the framework of the study for each chapter, with a brief description of the aim and content of each chapter.

Chapter 1: Introduction and problem statement

This chapter provides the background to the study and an introduction to the research; it discusses the problem statement, questions, objectives, and research methodology. It also notes the significance of the study and its value to the industry. Terms used throughout the thesis are clarified.

Chapter 2: The evolution of niche tourism, global mass tourism to niches

This chapter presents a review of literature, divided into two principal sections. The first section broadly frames the concepts, focusing on the tourism industry, tourism in South Africa, and tourism in the Western Cape. The second section focuses specifically on niche tourism, the marketing of niche tourism development in Cape Town, and pink tourism in Cape Town.

Chapter 3: The evolution of pink tourism in Cape Town

This chapter discusses the emergence of the pink tourism niche and reviews the destination amalgam in the pink sector and the services offered in the pink tourism sector. The marketing activities specifically for pink tourism in Cape Town are explored.

Chapter 4: Research design and methodology

This chapter focuses on the research methodology used to conduct the research. It discusses the manner in which the information or data was gathered, and how it was analysed. Further research was carried out through an analysis of print and electronic media.

Chapter 5: Data analysis and interpretation of results

This chapter discusses the findings from the semi-structured interviews and results. The key outcomes of the case study are also reported. This provides greater insight into whether a holistic approach can be adapted to mainstream small businesses in the niche tourism industry, or if gay businesses can translate from a niche market to a mainstream tourist market.

Chapter 6: Conclusion and recommendations

This chapter discusses the conclusions and recommendations derived from the data through semi-structured interviews and the case study.

CHAPTER 2: THE EVOLUTION OF NICHE TOURISM, GLOBAL MASS TOURISM TO NICHEs

2.1 Introduction

The aim of this chapter is to demonstrate the shift from mass tourism to niche tourism and the marketing activities identified. It shows how South Africa entered the international tourism market post its first democratic elections. With an increase in the number of tourist arrivals, government recognised its importance and adopted strategies to drive the tourism sector. It demonstrates how the tourism sector was regulated from a national to a provincial level. This was done through the formation of regulatory bodies that are key role players in driving strategic objectives in tourism. At provincial level, government invests in tourism through allocated budgets within different sectors to drive its investment in its tourism and marketing strategy. The chapter focuses on how the industry performs with its contribution to the Western Cape (WC) economy and employment, with Cape Town being a tourist attraction due to its natural sites, coastline, heritage, and food and wine industry. This chapter explores how the City of Cape Town identified niche tourism and recognised pink tourism specifically as a niche with investment potential to grow the economy and create jobs. It also gives context to the role mass and niche tourism plays in the economy and the broader tourism industry.

The study is framed by literatures that focus on: Tourism in South Africa, Western Cape and Cape Town; The development of Niche Tourism as a reaction to mass tourism; The social and political landscape in South Africa that has changed attitudes toward LGBT individuals and communities; and the resulting development and growth of pink tourism in Cape Town. This framework importantly influences the analysis of empirical data.

2.2 Tourism in South Africa

With sanctions being lifted in South Africa, tourists were wanting to travel to a new destination (South African Government, 2015; Mkhize, 1994). The ruling party, the African National Congress (ANC), sought to pave the way for transformation and economic growth through the tourism sector (Steyn, 2006:10; Department of Tourism, 2020b:18). The South African government's vision was

to establish South Africa as one of the top 20 tourism destinations globally by 2020. Smith (2018), highlighted the fact that the total GDP contribution to South Africa's economy was R412.5 billion, while supporting 1.5 million jobs. However, from 2019 tourism numbers declined by 2.3% in South Africa. In the Western Cape, 6 236 direct jobs were created with a total of R2,67 billion invested in the province (CCT, 2017:6).

The Department of Tourism, in its strategic plan for 2020–2023, identified two areas of focus:

- Seeing the growth of tourism as economic stimulation, thereby enabling job creation in the industry by addressing existing policies.
- Further growth in the industry through direction and strategic support which would encourage expansion, growth and policies which are business friendly (Department of Tourism, 2020a:7-21).

This influenced the South African government's decision to adopt policies to regulate the industry with the purpose of the Department of Tourism to be the catalyst and drive the National Tourism Sector Strategy (NTSS). The Department of Tourism operates under the Tourism Act of 2014 (Act 3 of 2014), which provides for the development and promotion of sustainable tourism for the benefit of South Africa, its residents and visitors (Department of Tourism, 2011b:7). It also provides for the existence of the South African Tourism Board, the establishment of the Tourism Grading Council, and the regulation of the tourist guide profession to ensure a code of conduct is adhered to in the industry.

The Southern Africa Tourism Services Association plays an important regulatory role in the industry for service providers. The governing body regulates the standards for all role players by offering support services such as training, legal advice, and lobbying for the sector. This regulation ensures South Africa can compete internationally in the tourism market and serves as a form of reassurance and security for potential tourists wanting to visit, knowing that the industry is graded according to international standards (Southern Africa Tourism Services Association, 2016). There is additional support for small businesses and owners who are starting a business, and the association provides further information on how the industry is regulated and operates.

The regulatory industries are listed below in Table 2.1.

Table 2.1: Key role players in the SA tourism industry

Role Player	Description
Association of Southern African Travel Agents	This is a representative forum that promotes professional service with its members and clients with focus on fair trade without violating rules and regulations. With nearly 200 associate partners and over 500 members in the tourism industry, it provides a network that benefits any business in the tourism industry.
Fair Trade in Tourism South Africa	A project of the World Conservation Union, it promotes access for disadvantaged tourism businesses. It also promotes the rights of fair labour practices, and cultural, human and environment practices.
National Accommodation Association of South Africa	This association brings together all local and provincial accommodation associations.
South African Association for the Conference Industry	The aim is to maintain and improve standards of efficiency and professionalism in the conference industry in SA.
Tourism Grading Council of South Africa	This is South Africa's only officially recognised system for the star grading of accommodation establishments and promotes improvements and standards across all areas of the tourism industry.
Southern Africa Tourism Services Association	A non-profit, member-driven association representing major role players like car hire, airlines, hotels, coach, and tour operators.
South African Tourism	The official international marketing organisation participating in workshops, and trade travel exhibitions. It also provides a variety of marketing and promotional material.
Tourism Enterprise Programme	The TEP scrutinises the sustainability, growth and development of small tourism businesses.
Tourism Business Council of South Africa	Umbrella organisation focusing on engaging with all stakeholders and developing macro strategies, thereby creating an enabling environment.

Tourism, Hospitality and Sport Education and Training Authority	Established under the Skills Development Act (No. 97 of 1998) for the tourism hospitality and sport economic sector, the aim is to develop the skills of workers, encourage employees to train, and increase investment in education in the tourism sector.
Restaurant Association of South Africa	A non-profit organisation formed to protect the restaurant industry and act as a communicator and information centre, ensuring ethical business practices are adhered to.
Federated Hospitality Association of South Africa	Represents the hospitality industry in the public and private economic sector, business and environmental forums. Close ties with SAT, Tourism Business Council of SA, Department of Environmental Affairs, and Department of Water Affairs and Forestry, ensures member input and participation at the highest level.

Source: Business Partners, (2016)

In order for South Africa to benefit from the developmental potential of tourism it's imperative to have a structure that regulates and supports the industry (Cornelissen, 2005). The South African government has identified tourism based on the increasing number of tourist arrivals to address unemployment and the formation of small businesses (WCG-DEDAT, 2014a:112).

2.3 Tourism in The Western Cape

In the Western Cape, tourism oversight is funded by the Department of Economic Development and Tourism (WCG-DEDAT), which also has the legislative and provincial mandate for tourism, allowing it to respond to different aspects like development, regulation and marketing. DEDATs' purpose is facilitating the planning of an integrated strategy with the aim of a sustained and increased growth and job creation in the industry (WCG-DEDAT, 2018:92). The industry is widely comprised of urban tourism similar to other regions of South Africa (Rogerson & Visser, 2006:67). This is done with a budget of R54 960 000, made up of four sub-programmes: Tourism Planning, Tourism Growth and Development, Tourism Sector Transformation, and Tourism Destination Marketing (WCG-DEDAT, 2018:101). In 2016, the number of tourist arrivals in the Western Cape was 1 568 357, compared with 1 323 283 in the previous year, with a growth of 18.5%, while the total spend grew by 21.6% (Africa, 2017). From a national perspective, the Western Cape had a 23.9% tourist spend, with 15.65% of tourists arriving in the province (WCG-DEDAT, 2018:92).

Through a five-year plan (2015–2020), the department conceptualised Project Khulisa, with its focus on prioritised activities and focused outputs for delivery which will contribute to increasing gross value added (GVA) and direct jobs in the industry.

The three focus areas for Project Khulisa are to:

- boost awareness of the Western Cape in key markets and sectors to drive conversion;
- improve accessibility to Cape Town and the regions; and
- boost attractiveness of the region through competitive product offerings and compelling packaging (WCG-DEDAT, 2018:93).

These focus areas became DEDAT’s key focus areas in the Khulisa tourism roadmap in the provincial tourism strategy for the 2015/16 financial year (WCG-DEDAT, 2015:107). It is important to note the priority given to targeted niche markets forming part of the strategic plan for DEDAT, as noted in item 2 in Table 2.2 below.

Table 2.2: Key elements to sustain the Western Cape’s tourism industry

Accessibility	Improve the visa regulations with national government
Set strategic focus	Give priority to targeted niche markets & target certain market segments
Promotion	A space where public & private sector can share ideas strategically & financially

Source: McKinsey & Company (2014:35)

All DEDAT’s tourism destination marketing activities are activated through a public entity called WESGRO and facilitated through the Tourism, Trade and Investment Act of 2013 (WCG-DEDAT, 2015:90). WESGRO’s Tourism Destination Marketing programme’s priorities include a single

tourism destination strategy and delivery tool to ensure effective and integrated destination management and marketing. The second priority is co-ordinated delivery to improve attractiveness and destination accessibility, while the third is to improve brand awareness to ensure integrated marketing in key segments and prioritised niche markets locally and internationally (WCG-DEDAT, 2014a:112). Other key areas prioritised in the strategic marketing planning is cruise tourism; improvement of local transport; increasing air routes; and an efficient and effective tourist guide regulatory service. These strategies are supported by the number of international tourist arrivals at 1.2 billion, with direct foreign spend of R8.5 billion to R13 billion. The domestic trips undertaken saw a spend of R1.62 million in the 2014 to 2015 year (WCG-DEDAT, 2015:115). The tourism industry and tourists alike have recognised Cape Town as a popular tourist destination by voting Cape Town the world's favourite city ahead of Vancouver and New York in Tripadvisor's Travellers Choice Awards in 2012. Cape Town was soon being promoted as one of the accessible destinations accommodating all tourists (Department of Tourism Industry, 2011:7).

2.4 Western Cape Contribution to Economy

The pink niche market contributes to tourism's broader economic impacts. The estimated economic impact for the Western Cape was R428,3 million, with R20,37 million in advertorial revenue for the entity (WESGRO, 2017:54). In 2017, the Western Cape's share of tourist arrivals was 16.8%, with a 28.6% contribution spend in South Africa. The spend in the Western Cape was R23.1 billion, with an increase of 27.8% on the previous year (WESGRO, 2018a:9). Driven by the WCG's Project Khulisa of achieving a R28 billion contribution to GVA and creating 100 000 jobs by 2019, the department is challenged by growing domestic and international arrivals across the Western Cape (WCG-DEDAT, 2018:92).

The department identified the following challenges:

- Awareness – no clear brand, uncoordinated and competing marketing plans, overlapping in destination marketing spend by multiple stakeholders and negative perception of Africa in that processes and administrative systems for front line services in government are inefficient in serving the public. Therefore, planning, and complicated services negatively impacts smooth delivery of services.
- Accessibility – visa restrictions, long flights and limited direct flights.

- Attractiveness – fragmented provincial strategy, underdeveloped tourism offerings, movement in destination due to poor public transport and negative perceptions around safety at destination (WCG-DEDAT, 2018:60,92).

2.5 Niche Tourism

Niche tourism has different segments depending on tourist preferences and their motivations for travel. The niche is classified into different sectors, allowing service providers to be specialists in the services or products they offer in the industry. Tourists' consumer behaviour has produced a more segmented, specialised and sophisticated market, and the development of niche tourism is a response to consumer needs. The expression of identity through specific activities that overlap with other consumer preferences allows areas to develop as needed, creating new niches (Ali-Knight, 2010:26).

Niche tourism emerged through globalisation within a common marketplace characterised by the homogenisation of culture, ideas and leisure activities, thereby encouraging individuals to seek out unique opportunities of likeness (Ali-Knight, 2010:14-15). The self-actualising of tourists within the mass market of globalisation has seen niche markets diversify and grow (Timothy, 2019:2). In a world of wanting the same things and similarity, niche tourism speaks to diversity and ways of marking one's difference, thereby ensuring a way of making sure expectations, needs and wants are met (Department of Economic Affairs, Agriculture & Tourism, Western Cape, 2002). Niche tourism is a way of stimulating further growth in the tourism sector by diversifying its product offerings (CCT, 2009:32). This specialised form of tourism also allows smaller companies to have an advantage in the industry by offering personalised services and a high level of product focus on specific consumers (CCT, 2009:32). This specialised service also serves as a connection between a customer's dreams, aspirations, experience and desires (UNWTO, 2012:21). Niche markets are influenced by a range of cultural and personal interests, so the categories are fluid and infinite in their expansion. As they co-depend on each other and impact on each other, it's important to take a destination approach to the development of markets rather than an individual approach (Robinson & Novelli, 2005:8). The position strategy for each individual niche should have an action plan with clear time frames, prioritisations, and resources, and lastly, who the role players will be (Morritt, 2007:150).

While most tourism offerings fall under the label of mass tourism, niche tourism within micro-niche markets offers unique tourism products to consumers (Robinson & Novelli, 2005:4). Increasingly mass tourism is making way for niche and micro tourism, which caters to individual needs and preferences (Burns & Novelli, 2006:6). People view themselves as individuals almost all the time in most aspects of their lives. As individualism is key, people are defined by different likes and dislikes (Guaracino, 2007:2). The same can be said for tourism identifying with mass tourism and niche tourism, sometimes also referred to as individual or special interest tourism.

In marketing terms, niche refers to two inter-related ideas. Firstly, there is a place in the market for a product, and secondly, there is an audience for this product where both place and audience are seen to be particular entities. This can be extended further to refer to a specific product tailored to meet the needs of a particular audience or market segment (Robinson & Novelli, 2005:4). Figure 2.1 below demonstrates the relationship between a niche and micro niche market that caters to tourists with special interests or hobbies which they specifically pursue when travelling.

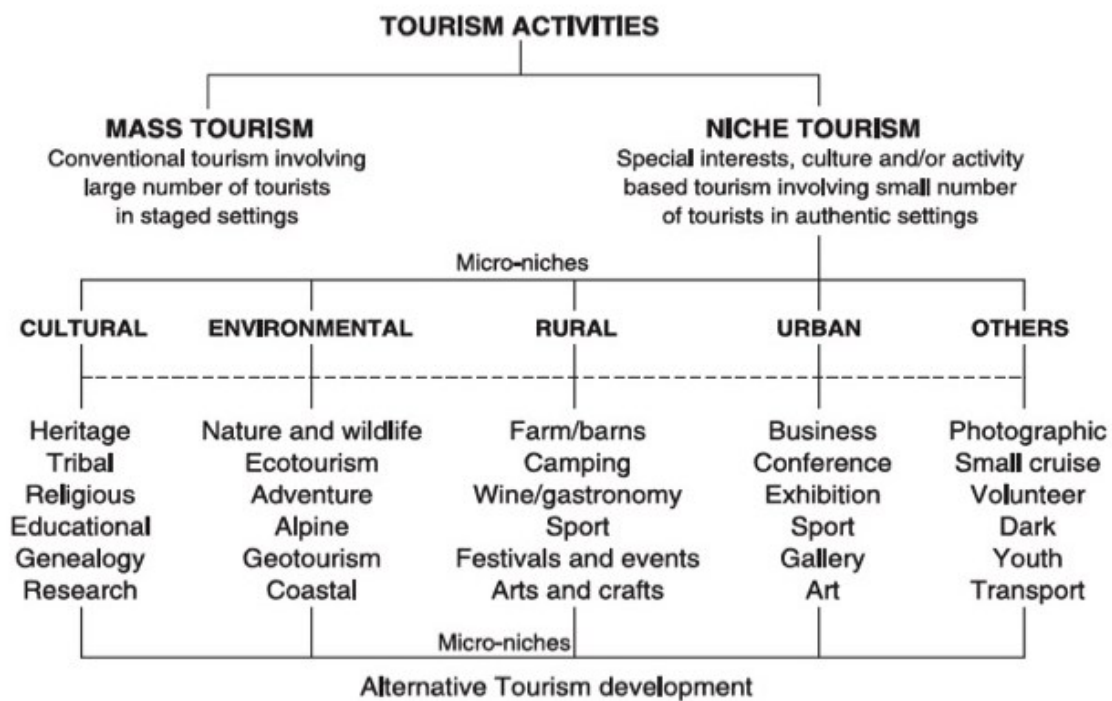


Figure 2.1: Niche tourism components
Source: Robinson and Novelli (2005:9)

Niche tourism consists of a wider range of micro-niches, such as cultural tourism, adventure, business, wine, cuisine, backpacking, photographic, ecotourism, spa tourism, safari, gambling, and wellness or spiritual tourism, according to the City of Cape Town and the UNWTO. In Figure 2.1 above, pink tourism would fit under the urban micro-niche subheading. The list could be expanded depending on which point of view or point of interest one has, thereby adding another group or title and creating a niche. The opportunities lying within the different niches are limitless if pursued correctly, specifically the development of skills in the workplace (CCT, 2009:32). The niche market subset derives from a market of a specific product identified by focusing on the particular market needs defined by its product features, price and quality. This market is highly specialised, aiming to stay ahead of its competitors by ensuring high profits by narrowing its focus on the target market (Yeoman, 2008:124). The product is not dependent on demand, but rather on satisfying a consumer's need. When the niche market approach is adopted, it is important for businesses to know and understand the market's demographic profile by knowing their customers, market segmentation and target market by setting clear goals and objectives for that specific sector. If a business plans to be successful in the niche market, its plan should include clear and consistent themes aligned with the business structure, links between its strategies and focused attention on all business activities (George, 2008:176-178).

According to the South African Local Government Association (2010:6), benefits of niche tourism include the following:

- An opportunity to diversify the product offering by creating new markets.
- Higher profits through serving foreign tourists in return for higher foreign revenue and consumer spending.
- Greater growth potential than mainstream tourism through offering a specialised service.
- The developmental impacts stimulate the creation of quality jobs that require specialised skills in comparison with low or semi-skilled jobs associated with mainstream tourism.
- Niche tourism activities are mostly community based and outside traditional tourist areas, thereby encouraging geographic distribution of tourism benefits.
- As niche tourists are independent travellers, more local spending takes place.

In light of the above, it is important to identify the micro-niches within niche tourism and manage them. One could further conclude from the above that pink tourism qualifies as a niche market (Robinson & Novelli, 2005:5). Geographically speaking, micro niche markets would differ from country to country, and even within national borders, as is the case with Cape Town (for example, wine and pink tourism).

2.6 Niche Tourism Development in Cape Town

The City of Cape Town in 2002 recognised the importance of niche markets and their economic impact because of premium expenditure. This happened after a detailed market assessment, and the CCT later commissioned a study on niche markets in 2009 to review the identified tourism niche sectors. Assessments were done on these markets through profiling, common segments, understanding product consumption, and identifying the infrastructure required to support the attraction of visitors (CCT, 2009:25). These findings could form the basis for future tourism development initiatives, product plans and priorities in Cape Town. Furthermore, tourism studies bolstered the belief that the LGBT tourism market represented a growing and increasingly diverse and global market to invest in, as it has been noted that not only does this niche market travel far, but gay visitors are lucrative in terms of spending power owing to being single and having disposable income (Southall & Fallon, 2011:219). On this basis, the focus of the Cape Metropolitan Tourism survey included a variety of niche markets, such as the Meetings, Incentives, Conferences and Events (MICE) market, events, cruising, gay tourism, film, eco-tourism, adventure and backpacking. While niches were identified in the study, no specific outcomes were mentioned (CTC, 2009:150). Other niche tourist attractions in the Western Cape province include one of the world's heritage sites, Robben Island, cultural tourism of the San tribe in the Karoo, Table Mountain (one of the Seven Wonders of Nature), wine and food at various wine estates and restaurants, ecotourism in the Cape Floral Region, sports tourism with the Cape Town Cycle Tour, and business tourism with the CTICC hosting a number of conferences yearly.

2.7 Pink Tourism in Cape Town

Not only is pink tourism a global phenomenon (Clift et al., 2002; UNWTO, 2012; UNWTO, 2017b), but is also a significant niche in Cape Town. Although the response rate was low in the 2009 City

of Cape Town market study, it highlighted an emerging market in the niche sector. The study uses the term 'gay tourism' to describe the niche, it is understood it encompasses a range of LGBT tourists. In the context of this research, the term 'pink tourism' refers to tourism that focuses on the needs of LGBT tourists. South Africa was the first country in Africa and the fifth in the world to legalise same-sex unions, thereby committing to offering equal rights to any visitor to its country without bias towards sexual orientation (UNWTO, 2012:21). As time passed, the attraction of the gay village gained momentum, with not only local LGBT people frequenting the village, but heterosexual people visiting the De Waterkant area as well. Owing to the need to cater to a broader market, businesses in the area began to change. LGBT individuals started socialising in different places and businesses needed to rethink their offerings and how to change their marketing strategies (Visser, 2014; Rink, 2016). Pink businesses started closing in the area and property developers started changing the area into homes for foreigners, apartment buildings, media houses, and boutique hotels (Visser, 2014; Rink, 2016; Hattingh, 2019:137).

Cape Town received international recognition by hosting the International Gay and Lesbian Travel Association (IGLTA) symposium, the first time ever in Africa (UNWTO, 2012:21). Soon Cape Town was competing with major cities like London, San Francisco and various European cities, owing to hosting the symposium. They welcomed tourists through a variety of attractions across the Western Cape and the rest of the country (Brand South Africa, 2005). In 2012, Out Now Consulting, a Netherlands-based company, estimated the LGBT market to be worth \$165 billion for leisure travel. The survey is ongoing, requesting expenditure in the last 12 months with the sample size exceeding 40 000 respondents from 25 countries including SA (UNWTO, 2012:9). This highlighted the market potential, with LGBT people being referred to as the world's highest spending tourists, owing to a high disposable income. The acronym DINK (double income, no kids) was adopted, referring to same-sex couples as optimal consumers, with gay men being bigger spenders compared with their lesbian counterparts (Southall & Fallon, 2011:223). LGBT tourism placed the spotlight on the niche market in South Africa with not only exposure to gay tourism, but also other niche markets for businesses in tourism. LGBT people and activist organisations stepped forward by forming the Gay and Lesbian Association of Cape Town Tourism Industry and Commerce (GALACTTIC) to take advantage of the new law including gay rights and recognising LGBT people as equal (Southall & Fallon, 2011:225).



Figure 2.2: Pedestrian in Long Street, Cape Town
Source: Image captured by the researcher (2019)

Figure 2.2 above demonstrates the mainstreaming of LGBT identity displayed in the streets of Cape Town. In 2006, niche tourism gained further momentum when the South African Gay and Lesbian Travel Alliance (SAGLTA) was formed, representing gay-friendly hotels, guesthouses,

and bed and breakfast establishments. Various travel products began to attract international travellers to South Africa including Cape Town with its gay village in the niche tourism sector (Guaracino, 2007:4; Visser:2002). This niche became a marketing focus for the Cape Town tourism industry when conducting research on niches (CCT, 2009:173). Pink tourism became an important niche in Cape Town along with South Africa's tourism industry expansion in the 1990s (Rogerson & Visser, 2005:69).

The question is, how do pink niche tourism businesses transition to compete in the mainstream leisure market for sustainability? The research explores the current state of the pink tourism market in Cape Town through identifying a subset of different service providers in the market. The synergies of the niche and mainstream market form part of the research, as well as the barriers to growth in the pink sector and the viability of the pink niche in the context of social change in Cape Town.

In the case of Cape Town, the city has engaged with the niche market in three principal ways (Tebje, 2002; Venske & Hattingh, 2012): through a pink visitor's map, the Pink Map (Rink, 2008b:18); a gay tourism section in the official visitors guide to the city; and representation of Cape Town's gay tourism industry on international bodies such as InterPride International.

Given the impact of tourism and the shift in society, niche markets are more important than ever to cater to the requirements of niche tourists. However, the pink niche market is more susceptible to change, given society's attitudes towards sexuality (Rink, 2013; Visser, 2014:470). As a result, the pink tourism niche market may be required to change its marketing strategies to adapt and cater to a wider audience of tourists.

2.8 Tourism Marketing

As the world becomes smaller because of air travel, competitive marketing strategies for tourism are adopted to ensure countries maintain and continue to grow their share of the market (Hall, 2004; UNWTO, 2017a:75). As marketing appeals to individual needs, this need is different for each individual. The need to create a desire is not the same for all markets (Hall, 2004). People like to differentiate themselves as individuals and like to be recognised for this (Guaracino, 2007). They identify with whom they are and their beliefs, unless they identify with a particular group such as religious communities, gender, or membership of clubs or societies. In tourism, the

differentiation between mass tourism and niche tourism is key. As people dislike being regarded as part of a mass but rather viewed as individuals, niche tourism came about.

In the niche marketing world, businesses can't adopt the same approach to market a product or service. Within niche tourism, the various sectors of tourism market their services to ensure they capture the desired sector. Different marketing strategies are adopted, depending on the target audience. Marketing is an ongoing process or activity carried out by a tourism marketer or business (Fyall & Garrod, 2004:49). At a business level, the marketing focus should be meeting the customer's needs, satisfying customers, generating sales and informing customers (George, 2008:285). Before embarking on a marketing new strategy, it's key to know and understand your business and its market. Table 2.3 below lists the key elements for a business to follow when it reviews its marketing strategies or when it is in the process of adopting a marketing strategy. The four elements listed below guide businesses to sustain themselves and service their target market.

Table 2.3: Key elements in tourism marketing

Element	Description
Identifying market segments	Information about consumer behaviour, market trends and customer segments.
Targeting marketing	This is a planned way of communicating the goals and objectives of the business. At this stage the company should also analyse its strengths and weaknesses in its current and prospective market.
Market positioning	Marketing mix: this is also known as the four Ps – product, price, place, and promotion. These are core areas for management as they determine how businesses engage with their customers.
Promotional strategies	Review past and current promotional strategies to achieve planned goals. This mix is made up of advertising, sales promotions, personal selling, e-Marketing, public relations, and direct marketing.

Source: George (2008:269-274)

2.9 Summary

A review of the literature has indicated how the tourism industry was recognised by National Government to grow the economy and create jobs by the introduction of a regulatory framework. The chapter indicates the importance of mass tourism and how niche tourism with its different sectors can be a key driver for a growing economy. The regulation of the industry by forming various governing bodies indicates government's commitment to the industry. The marketing activities directed towards the niche are different from those of mass tourism, and this chapter forms the base of the study to illustrate the shift. The extension of the literature review in the next chapter examines the evolution of a niche and its marketing activities.

CHAPTER 3: THE EVOLUTION OF PINK TOURISM IN CAPE TOWN

3.1 Introduction

This chapter builds upon the review of literature in order to trace the evolution of pink tourism in Cape Town. Using the framework provided by the destination amalgam and principles of tourism marketing, this approach is adopted to demonstrate how government and various organisations support the niche through different activities. The marketing strategy of the four Ps, that is, product, price, place, and promotion is also noted in this chapter. As these support services are crucial to the sustainability of the pink tourism industry, it is important to note the role they fill in supporting the niche. The services range from transport, support groups, arts festivals and natural attractions to film festivals. The rebranding of Cape Town Tourism also supports the industry in that it remains current through its new social media platforms. In concluding the chapter, it is important to note the change in business due to societal attitudes and the change in lifestyle of LGBT individuals who may have married or adopted children, thus seeking a different place to socialise.

A tourism sector with no marketing activities planned is how a 'gay village' developed in the City of Cape Town in De Waterkant (Rink, 2008a:208). A new niche called the LGBT tourism market emerged in De Waterkant through the initiative of the marketing manager employed by Village Life, who identified the economic opportunity of letting holiday homes of foreign owners who return home after the Cape Town holiday season which runs from December to March annually. The marketing of De Waterkant and pink businesses in the area is supported by the introduction of the Pink Map, advertising a range of services catering to the pink market. The reach of the Pink Map is extended to a national and international level as a free supplement in the weekly *Mail & Guardian*. Mention is made of how Cape Town Tourism joined professional international tourism bodies, thus recognised as a role player in the industry and placing Cape Town on the map.

3.2 Cape Town Tourism

The City of Cape Town's Tourism Development Plan 2013–2017 states that Cape Town Tourism is the official tourism organisation responsible for destination marketing, industry and visitor services. The tourism strategy was to enhance growth and jobs, conserve heritage sources and

diversify source markets and product development (CCT, 2013:88). An inclusive strategy is recommended through lifestyle, creativity, and nature, which overlap in the three themes. In the lifestyle theme, reference is made to events, leisure niche products and activities. It identifies niche markets as a target, noting cultural heritage tourism, arts, film, design, and dance, with strategic focus on creative industries, backpacking, cultural heritage, cruising, nature, and food and wine tourism. As the official regional tourism organisation responsible for destination marketing to visitors and industry by the City of Cape Town, this office plays a crucial role in supporting the economy of the Western Cape. It drives the tourism strategy by involvement, participation, relationships and partnerships by listening to needs. This is done by working side by side with local communities and assisting them in building tourism and marketing initiatives. Previously disadvantaged individuals, organisations and companies should be assessed and are encouraged to be part of the industry. Cape Town Tourism is driven by principles such as Responsible Tourism, the Proudly South African initiative, and Fair Trade in Tourism, encouraging all members to adopt these principles in all operational aspects of business. Information to locals and tourists is accessible at the walk-in centre based in the CBD in Cape Town, offering a variety of services, including marketing material, by all stakeholders affiliated with Cape Town Tourism. On the website, the same information is accessible, and businesses are encouraged to become members where they can advertise their business and receive whatever support is needed from Cape Town Tourism. In May 2016, Cape Town Tourism launched its new website with a new brand identity representing the organisation and the city's creative and vibrant personality (Cape Town Tourism, 2017). In addition to the new website, there are new branding and marketing tools and strategic partnerships with key role players and destination marketing organisations (DMOs). This was achieved through a consultation process with stakeholders, communities and businesses to ensure an inclusive approach, with the brand identity #lovecapetown adopted.

Cape Town Tourism encourages businesses to be part of the industry by registering and paying a membership fee. Access is then made available all to marketing opportunities through its networks. With affiliation to the different tourism bodies locally and internationally, travellers can be assured of a professional level of service in the tourism industry. With the international recognition Cape Town Tourism receives, it would be an invaluable opportunity for businesses to use the marketing and support opportunities provided. Businesses are afforded the opportunity to advertise in *The Pink Tongue* and the *Gay Guide* (Cape Town Tourism, 2016).

As Cape Town Tourism states: “Our brand is more than just a logo, it’s about living up to a promise we make every time and everywhere a visitor sees, feels or touches Cape Town. It’s about accepting and celebrating our city in all its diversity” (Cape Town Tourism, 2017:2). What is key to note in the message above in the 2015/16 annual report and the image (Figure 3.1) below, is that the message of inclusivity is important to the local and international tourist market. This suggests a city inclusive of people who are LGBT or however they prefer to identify themselves.



Figure 3.1: #LoveCapeTown

Source: Cape Town Tourism (2017:8)

In the 2019 edition of *Love Cape Town*, Cape Town’s official visitor guide, the ‘pink district’ is described in the De Waterkant area as having LGBT-friendly bars and restaurants in abundance (Cape Town Tourism, 2019:94). It goes on to say De Waterkant is internationally renowned for its “open-minded attitude”.

In consultation with the National Gay and Lesbian Chamber of Commerce (NGLCC), The Other Foundation recognised the importance of LGBT businesses and established a network, hosting its first workshop in Cape Town, April 2016. The main policy agenda is driven by the recognition of international economic and development policy by “inclusive economic growth” and development approaches of “leave no-one behind”. The reason for the approach is to promote economic empowerment and participation and improve social inclusion and physical safety of LGBT people. A Memorandum of Understanding (MOU) was signed, with quarterly meetings agreed upon, thus recognising pink businesses as an economic contributor to business sectors in South Africa (The Other Foundation, 2016:2).

3.3 Emerging LGBT Niche in Cape Town

The demonstration of gay rights was strengthened by the formation of gay and lesbian social movements (Visser, 2003b:169). This was further supported by South Africa being the fifth country in world to legalise same-sex marriages (UNWTO, 2012:21). This demonstrated inclusivity and awareness of people's rights in all areas of social engagement. It was also a message to the international community that South Africa was ready to engage in all sectors of society. The emergence of the LGBT niche became visible in March 2001, when the manager of Cape Town Tourism said: "Gay visitors are lucrative who have double income, no children and they spend double or triple than a regular visitor; they are exciting visitors and enjoy things like clubbing [and] sport, while also adding flavour to the city" (Elder, 2004:581). Elder (2004) contends the recognition of Cape Town by the international gay market was by being voted the fifth most popular destination in the world. Cape Town's reputation as a city liberal in socio-political views was clear in opening the LGBT market and saying, "you are welcome", no matter what your sexual identity is (Elder, 2004:583). Besides the economic benefits, the message of brand image and tolerance, respect and open mindedness increases the number of tourist visitors. In Figure 3.2 overleaf, under the heading "Cosmopolitan", the city is referred to as "gay-friendly", suggesting mainstreaming and changing attitudes.

WHAT MAKES THE CAPE TOWN CENTRAL CITY DISTINCTIVE?

Unique attributes of the Central City that contribute to the overall distinctiveness of Cape Town

"Table Mountain is the defining feature of Cape Town, the spatial anchor for the city. There is an intimate relationship between the two: there is both a park within a city and a city within a park"
– Brett Myrdal, CEO, Table Mountain National Park



Topography: natural landscape - mountains, fresh water, sea, Table Mountain – umLindi Weningizimu, the "Watcher of the South", Robben Island - World Heritage site, 350-year old built environment, globally recognisable skyline



Site of struggle, resistance and transformation: resistance and conquest, slave rebellions, struggles for freedom of religion and the press, anti-apartheid marches and demonstrations, Hands Off District Six campaign, Parliamentary opposition, political prisoners on Robben Island, Nelson Mandela's first speech to the world as a free man, negotiations for the new Constitution, Truth and Reconciliation Commission



Cosmopolitan: diversity, mix of people – local, visitors, immigrants, range of activities and experiences – festivals, carnival, parades, markets, songs, humour, gay-friendly



Lifestyle: Proximity to beaches, mountains, green spaces, pavement cafes, leisure activities, favourable year-round climate, urban attitude with balance



Well managed: safety and security, cleansing, quality urban management, social development partnerships



Africa: Southern tip, historical trade and slave routes, migration



Globally renowned destination: natural beauty, tourism, conventions, meetings, exhibitions, events, festivals



Legislative capital and diplomatic centre: Parliament, three spheres of government, public buildings and services, focus of civic life including demonstrations and protests, location of majority of embassies, consulates and high commissions



Distinctive neighbourhoods: Bo Kaap, District Six, City Bowl, De Waterkant, Woodstock, Waterfront, Upper Long Street, East City



Seat of learning: public and private institutions focusing on education, training and entrepreneurship development, students and scholars



Maritime: Cape Town Harbour, V&A Waterfront, Atlantic ocean, "Tavern of the Seas"



Heritage: history and memory, people, famous events, architecture, public spaces, green spaces, museums, places of worship, languages



Corporate: Foreshore, tower blocks, financial and business services, professional services



Creativity: cultural industries, precincts, nightlife, independent retail, cuisine, markets, events, music, voice, performance, craft

Figure 3.2: Cape Town Tourism marketing brochure

Source: (CCT, 2013:17)

3.4 The Emergence of Pink Cape Town

The emergence of Pink Cape Town on the international stage is evident in the Pink Map. It was through a publisher who had a special interest in maps that the first Pink Map was published (Rink, 2008b:84). It was the development of the De Waterkant area as an LGBT space that Cape Town became known as the gay capital of South Africa (Visser, 2003b:176).

Visser (2003b:169) and the City of Cape Town (2013:68) argued that Cape Town had been the main beneficiary of tourism in Africa through the development of the Victoria & Alfred Waterfront (V&A) and the CTICC development. As the V&A shopping centre is located close to De Waterkant, it is an important destination for gay male tourists to shop because of the luxury branded stores

in the centre. The V&A Waterfront complex is also centrally located for locals and tourists in Cape Town. This, along with other amenities indicated by Elder (2004), demonstrated that Cape Town's gay leisure space was taking shape. Elder (2004) refers to the possibilities of Cape Town as a gay tourism market through marketing and the potential impact of Cape Town identifying itself as a gay tourist destination (Elder, 2004:581). This emerging market was supported by what was referred to as the 'pink rand'. This not only refers to the spending power of the LGBT market, but also its influence on the social grouping and economic sector (Hughes, 2006:8). As indicated in a report by The Other Foundation (2017:7-9), the value of the pink rand spend in South Africa is between R53 billion and R204 billion by LGBT persons, who are highly educated, earn above R30 000 a month, and spend large amounts on luxury items.

3.5 Tourism Marketing in Cape Town

The marketing of gay Cape Town, targeting gay and lesbian travellers from the US, was first noted by Elder in 2004. In *Out and About: Essential Information for Gay and Lesbian Travellers*, an article is featured about South Africa and Cape Town (Elder, 2004:583). A second article sponsored by South African Tourism was featured in the same publication in 1997 of venues for gay and lesbian travellers. In 2011, Southall and Fallon noted although no specific overriding master plan was in place to attract the gay market, Visser (2002) and Tebje (2002) had identified different three effective strategies that were adopted. By hosting the Gay and Lesbian Travel Association conference and combining a bid for the 2010 Gay Games, these activities promoted and marketed SA's image in the international gay market as a premier destination as imagined by LGBT tourists (Bickford-Smith, 2009:1764; Visser, 2002:91).

Beyond the pink market niche, tourism marketing in Cape Town is a critical government mandate. Through the Department of Economic Development and Tourism, WESGRO receives funding and has the legislative mandate to implement, develop and promote a trade, tourism and marketing strategy for the Western Cape (WCG-DEDAT, 2018:99). This is supported by the strategic mandate of "conducting tourism destination marketing and promotion for the Western Cape with additional funding received from the City of Cape Town". WESGRO's Strategic Plan, 2015–2020 states its goals as marketing Cape Town and the Western Cape as a tourist destination to increase local and international travellers. The second goal is to build a strong regional economic brand which will be done by achieving a total of 71 joint marketing agreements

through one of seven programmes (WESGRO, 2019:17). Responsible tourism is the livelihood of the industry in that it supports natural, social and economic environments (Frey & George, 2010:621). This is done through Programme 6: Destination Marketing, its purpose being to drive tourism destination marketing and promotion (leisure and business) for Cape Town and the Western Cape, which is done through three sub-programmes listed below:

Table 3.1 WESGRO marketing purpose

Objectives	Activity
Boost awareness of the Western Cape in key markets and sectors	<ul style="list-style-type: none"> ○ Competitive identity ○ Partnership growth strategies in key markets ○ Digital management and real time intelligence ○ Grow business tourism ○ CRM and Stakeholder management
Improve accessibility to Cape Town and the regions	<ul style="list-style-type: none"> ○ Air Access (which forms part of a separate strategic unit within Wesgro) ○ Cape Investor Centre (which forms part of Wesgro's Trade and Investment Unit) ○ Local transport marketing
Boost Attractiveness of the Cape through a competitive offering	<ul style="list-style-type: none"> ○ The Cross Cape promotion ○ Madiba legacy route ○ Gastronomy tourism production ○ Cape of Great Events promotion ○ Service level improvement

Source: WESGRO 2020-2025, (2020:57)

Table 3.1 above outlines the tourism marketing objectives for Cape Town, recognising events, food, culture and heritage tourism as a niche. The recognition of the pink niche by Cape Town Tourism in its marketing activities could possibly suggest a misalignment between the two entities.

3.6 LGBT Destination Amalgam in Cape Town

Tourist destinations are a mixture of tourism products, offering a combined experience to consumers where attractions stimulate a visit. The services and facilities support the destination in offering a service which is essential to the tourism industry (Cooper et al., 1998:105; Buhalis, 2009:98). The destination amalgam speaks to the attractions, events, accommodation, amenities

and services tourists can experience in Cape Town. All these services support one another in one way or another and contribute to the overall experience of the tourist. In Cape Town, the De Waterkant area is an example of a destination amalgam as the area is a clustering of services such as retail shops, offices, nightclubs, bars, restaurants, and boutique hotels, accessible by transport with relevant information available to visitors. Venske and Hattingh (2012) argue that pink event tourism clearly demonstrates how the destination amalgam brings together a range of services for a specific event and how they are interlinked. Their work focuses on the Mother City Queer Project annual dance party and demonstrates the impact of hedonistic pink tourists across the destination amalgam where they engage in shopping and nightlife (Venske & Hattingh, 2012:5). In the case of Cape Town, the elements of the destination amalgam (Cooper et al., 1998:105) are listed below.

3.6.1 Attractions

Attractions are what lure tourists or how interest is created in what tourists are coming to see in a country. These can take the form of natural or cultural attractions, heritage sites, culinary experiences, conferences, or just leisure pursuits. Attractions cannot be predetermined, as every tourist has his or her own personal reasons for wanting to visit a country. In spite of the existence of a pink niche in Cape Town, there are no specific LGBT attractions, other than beaches preferred by pink travellers, like Camps Bay and Clifton.

The attractions listed in Table 3.2 overleaf were highlighted by the Cape Town Tourism Year in Review for 2016/17 (Cape Town Tourism, 2018a).

Table 3.2: Cape Town Tourism attractions

Attraction	No.	Year on year growth
Cape Point	1 173 236	20%
Chapman's Peak Drive	991 848	9%
Groot Constantia	445 021	5%
Kirstenbosch Gardens	980 168	13%
Robben Island	373 443	-2%
Table Mountain Cableway	1 167 598	9%
Two Oceans Aquarium	492 836	7%

Source: Cape Town Tourism (2018a:7)

WESGRO reported the Western Cape has 14 of the top 20 attractions and historical landmarks in South Africa. In the natural attractions sector, 14 of the top 25 are based in the Western Cape, while Camps Bay and Clifton beaches are ranked in the top 10 beaches visited in South Africa (WESGRO, 2016:6).

In the City of Cape Town's Tourism Development Framework: 2013–2017 (CCT, 2013), the city applied the destination amalgam approach and identified the following categories:

3.6.1.1 Natural Attractions

In this sector of attractions, Cape Town has a variety to offer around Table Mountain National Park and the coastline. The natural attractions include natural resources, beaches, coastline, mountain ranges, forests, floral kingdoms, landscapes, wetlands, national parks and protected areas. These include Table Mountain, Boulders Beach, Silvermine Nature Reserve, and Cape Point, with beaches along the False Bay coastline and towards Melkbosstrand (CCT, 2013:70). The nature reserves are managed by Cape Nature in the Western Cape, with a total of 30 nature reserves offering hiking, picnic spots, bird-and wildlife watching, camping, educational tours and biking in its natural environment (Holden, 2000).

3.6.1.2 Cultural and Heritage

These attractions include arts, heritage, culture and historic sites. Culture can be further defined as archaeology, paintings, architecture, and sculptures. When visiting the Bo-Kaap, slave stories from Constantia, Robben Island, Langa and the Cape Flats are included in the cultural experience. Heritage can be further defined as interpretative art like drama and storytelling. Spaces dedicated to theatre are both formal and informal, with theatres like the Baxter Theatre, Artscape and the City Hall, as well as smaller independently run theatres in Observatory, Hout Bay, Kalk Bay, District 6, Camps Bay, and Durbanville. The City of Cape Town identified in their development framework the opportunities to market for struggle sites like the Langa Pass Office, the Trojan Horse site, Gugulethu Seven, and the UDF memorial. Opportunities in military sites are the Fort Wynyard Gun site near the V&A, Noonday Gun, Castle of Good Hope, and the Simon's Town Naval Base. There is also slave history and museums, with walks; however, work needs to be done to create the linkages (CCT, 2013:157). Robben Island was listed as the top landmark in the top ten cultural and heritage attractions visited in South Africa (WESGRO, 2016:6).

3.6.2 Events

The pink niche has been driven by major events like MCQP, Out in Africa Film Festival, Cape Town Pride and international events like the IGLTA conference and Mr Gay World in 2019 (see Figure 3.3 overleaf). It is important to note the event was sponsored by WCG and CTT's recognising the importance of major events and the mainstreaming of LGBT culture. Cape Town hosts events throughout the year: ones to note are the Cape Town International Jazz Festival, Cape Town International Comedy Festival, Cape Town Book Fair, Design Indaba, Cape Town Fashion Week, the Cape Minstrels, Cape Town Carnival, Summer sunset concerts, Cape Argus Pick 'n Pay Cycle Tour (now known as the Cape Town Cycle Tour), Old Mutual Two Oceans Marathon, Cape to Rio yacht race, Cape Epic cycle race, and J&B Met, as well as beer festivals, book festivals, art exhibitions, and mountain bike races (CCT, 2013:44). There are also smaller competitions and tournaments hosted such as cricket, soccer, and rugby, among others. The FIFA 2010 World Cup™ exposed Cape Town as a major destination in the international market (Department of Tourism, 2011a:36).



Figure 3.3: Mr Gay World 2019 Marketing

Source: World Tourism Marketing Conference (2019)

3.6.2.1 Mother City Queer Project (MCQP)

Cape Town hosted its first Mother City Queer Project (MCQP) in 1994, celebrating freedom based on sexual orientation (Rink, 2008:84). The idea of Andre Vorster, the first themed party, called 'The Locker Room Project', was attended by 1000 people. Hosted annually at different venues in December, the party has a different theme every year. This event has put Cape Town on the international party circuit and has been compared to the Mardi Gras in Sydney, Australia (GayCapeTown4u, 2018).

3.6.2.2 Out in Africa Film Festival (OIA)

The Out in Africa Film Festival has been held annually in Cape Town and Johannesburg since 1994 prior to screening in smaller towns across SA. The festival originated to celebrate the end of discrimination on the basis of sexual orientation and to ensure the visibility of Lesbian, Gay, Bisexual, Transgender and Intersex (LGBTI) individuals (Tucker, 2009:194). The festival intended to change negative perceptions of LGBTI people in religious and traditional communities by hosting discussions and debates after movie screenings. Hosted over 20 days, not only did the festival screen international films, but also local ones, ensuring LGBTI stories were told (*Cape Town Magazine*, 2014b). Owing to the global trend of reduced funding, this festival is no longer hosted.

3.6.2.3 Cape Town Pride Festival

Cape Town Pride is an annual gay pride event hosted in February over a period of seven days, ending with a parade. A week of activities, from poetry readings, sunset picnics, sports and art exhibitions, culminates in the parade, with the route approved by the local municipality. The first event was held in 1993, with the City of Cape Town being one of the main sponsors. It was noted that the CCT sponsored Pride in 2018, as they had a stand promoting Cape Town (GayCapeTown4u, 2018).

3.7 Amenities

3.7.1 Accommodation

Gay-owned hotels and guesthouses opened as gay-only accommodation facilities catering to the LGBT market. The accommodation sector assisted in achieving the sample size and was the main contributor to the current study. This element of the destination amalgam weighs heavily in the study as it is the place where tourists feel welcome and accepted – to coin a phrase, a home away from home. Figure 3.4 overleaf illustrates the range of luxury services offered, such as inhouse car hire, spa treatments, local tour bookings and golf ranges, to mention a few. As Jones (1996) demonstrates, same-sex couples suffered discrimination significantly more in accommodation reservations than opposite sex couples. This highlights the importance of specialised accommodation for the pink market. This offering includes hotels, bed and breakfasts

(B&Bs), guest houses, self-catering apartments, houses, Airbnb, resorts, campsites, golf estates, backpackers and lodges, with various star ratings on offer. Major hotel chains include the Southern Sun, StayEasy, Protea, Cellars-Hohenort Constantia, Cape Grace, V&A Hotel, Westin, One& Only V&A, 15 On Orange Cape Town, The Silo, Radisson Blu, while boutique and hip hotels include the Old Mac Daddy, a hotel comprising airstream trailers in the Elgin Valley. According to a survey done by WESGRO in 2017 with 948 participants, 10.6% of the participants preferred guesthouses, while 8.7% preferred to stay in hotels.



Figure 3.4: The Glen Hotel & Spa marketing brochures for its business divisions

Source: The Glen Boutique Hotel & Spa (2019)

3.7.2 Retail

The LGBT customer engages in leisure shopping due to a preference for luxury items. This sector is regarded as sought-after customers because of disposable income, hence the DINKS acronym

(The Other Foundation, 2017; UNWTO, 2017b). The V&A Waterfront is ranked as the top shopping centre in amenities in South Africa, while Cape Town Central had an increase of 23.2% visitors to the CBD (WESGRO, 2016:6). The V&A Waterfront has continued to show growth, from 918 000 visitors in 2014 to 1 101 000 visitors in 2016, with an increase of 31.1% in the 2015/16 year (WESGRO, 2016:7). The V&A Waterfront continues to be popular owing to the variety of designer boutiques, international brands, and cafés and restaurants, as well as the Two Oceans Aquarium and the departure point to Robben Island. With recent expansion and the opening of the Zeitz MOCAA art gallery, the area will continue to attract visitors. Alternative popular shopping areas to visit are Long Street, Century City, Kloof Street, St Georges Mall, and the Cape Quarter, as they offer visitors everything from Mzoli's, restaurants, craft, art, curios, boutiques and antiques (CCT, 2013:58).

3.7.3 Wine and Dine

In the wine and dine sector, LGBT consumers engage within the pink village and beyond, whether in formal dining or on exclusive wine estates (UNWTO, 2017b:88). Cape Town is referred to as the gateway to the Western Cape for both locals and tourists, because of easy access to the outlying towns of Stellenbosch, Franschhoek, and Paarl, as well as the Garden Route (WESGRO, 2016:11). The gastro experience in Cape Town caters to every palate, with local and international cuisine available. Restaurants are situated in the Cape Town central, northern and southern suburbs, and the experience can vary from lunch on a wine farm in Constantia to a local township experience at Mzoli's in Langa. Cafés and restaurants are situated along the coastline from Muizenberg all around the Peninsula to Mouille Point, including places like Hout Bay, Camps Bay, Noordhoek and many more. Weekend markets are also popular in Cape Town, supported by locals and visitors alike, for example, the Neighbourgoods Market – Woodstock, Constantia Waldorf Organic Market – Constantia, Wellness Fresh Produce Market – V&A, Willowbridge Slow Market – Tygervalley, and Rondebosch Village Market – Rondebosch, to name a few. Adjacent to Cape Town is the Cape Winelands District which includes Stellenbosch, Franschhoek, Paarl, and Tulbagh, which all have a unique tourism offering. The most popular wine route with more than 60 wine estates is Stellenbosch, with additional routes in surrounding areas with different activities including formal and casual dining experiences (CCT, 2013:59-68). A survey conducted by WESGRO in 2017 indicated that 15.2% tourists visited prominent wine estates and farms across the Western Cape province. In addition to the annual festivals listed above, there are

LGBT spaces at night. LGBT bars and clubs in Cape Town are Alexander Bar, Pink Panther, Crew Bar, Zer021 Lounge, Beulah Bar, and Stargayzer, while leisure and dining spaces are Beefcakes, Café Manhattan, Village Café (GayCapeTown4u, 2018). There are also bars that have entertainment in the form of drag shows such as Zer021, Crew Bar, Beefcakes and Gate69, referred to as 'theatre cabaret', as seen in Figure 3.5 overleaf. These establishments serve the mainstream and LGBT market alike with customers cross-cutting across the sectors.

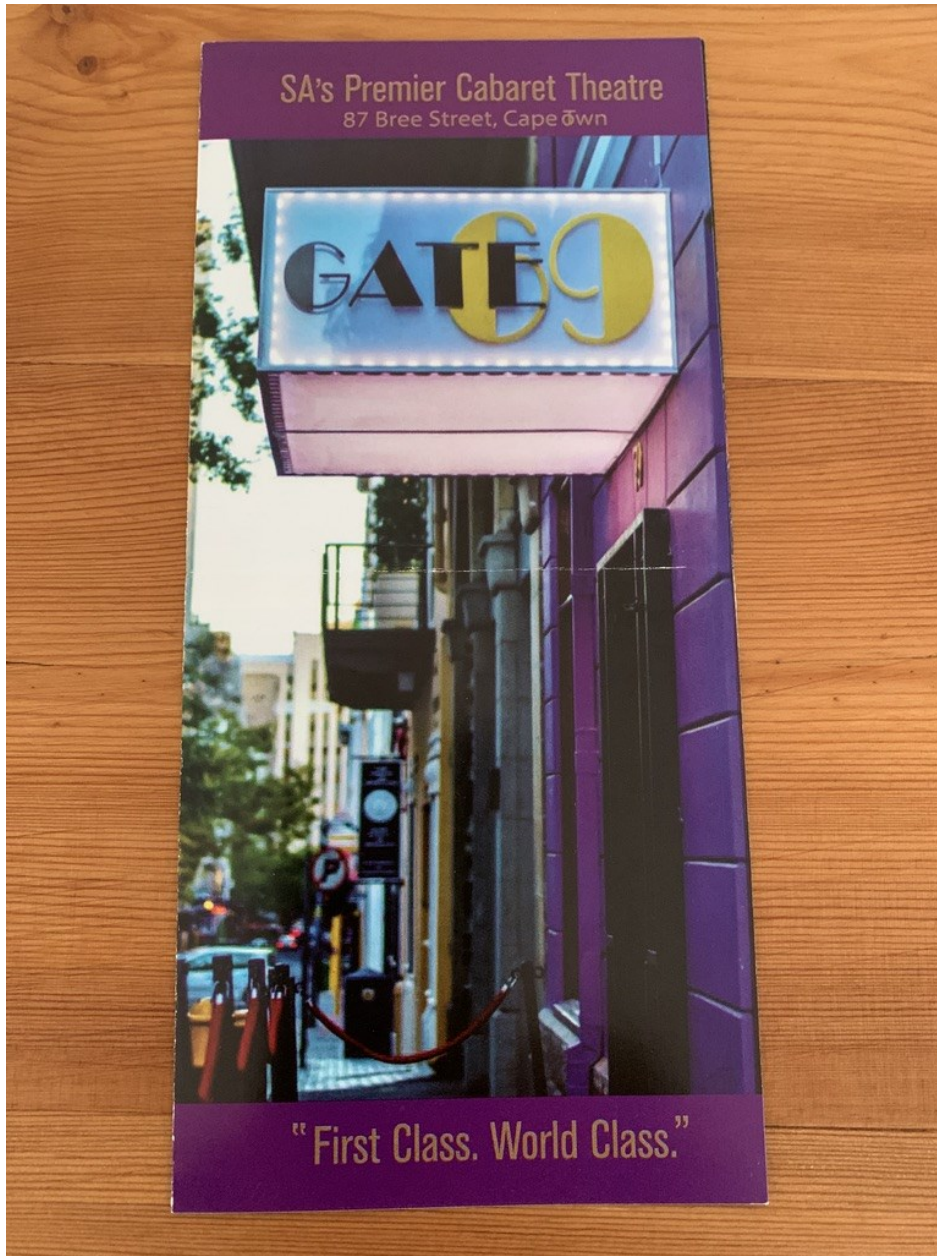


Figure 3.5: Gate69 Theatre Marketing brochure

Source: World Tourism Marketing Conference (2019)

3.8 Ancillary Services

The ancillary services listed below are publications, websites, gay health services, sports organisations and business networking groups that assist in promoting and marketing Cape Town as a gay city.

3.8.1 The Pink Map

The first Pink Map was published in 1999 by a map enthusiast after publishing various maps of interest, the first one being for arts and crafts enthusiasts. Through his gay connections and understanding of Cape Town, he decided to develop a map specifically for the gay tourist, although he didn't see it as an exclusively gay publication (Rink, 2008b:85). The map was a free publication which was funded through advertising costs from clubs, restaurants, bars and other entertainment venues with their names printed on the map. It also included information on places of worship, lesbian and gay helplines, HIV support groups and other gay-friendly spaces. In 2007 the map depicted the first gay theme, with a pink passport printed on the cover referring to the "Republic of Cape Town". According to Rink (2008b), this was the first publication referencing gay and gay-friendly businesses. This publication positioned Cape Town on a national and international level at a time when South Africa was still dealing with apartheid. The Pink Map was distributed nationally at the businesses that advertised, including the City of Cape Town's tourist centres. Further sponsorship through the South African newspaper, the *Mail & Guardian*, enabled the map to be distributed nationally and regionally, mainly in Johannesburg, Cape Town, and Durban. The newspaper was also distributed internationally on a smaller scale. This assisted in marketing Cape Town as a gay city during its time of publication; however, printing of the map ceased in 2012 (Rink, 2019:183).

3.8.2 Pink Guide

The publication was established in 2004, tapping into an estimated R4 billion p/a pink market in SA (Pink South Africa, 2016). This publication is a marketing tool used by pink and pink-friendly companies, officially endorsed by Cape Town Tourism and Cape Town Routes Unlimited, whose national and international distribution channels are used. The *Pink Guide* has a readership of 70 000 and is distributed at airports, local hotels, guesthouses, tour operators, tour agents,

provincial tourism offices and LGBT events such as Pride, Pink Loerie and Out in Africa Film Festival (South Africa Info, 2015).

3.8.3 Pink Tourism Websites (Booking.Com)

The GayCapeTown4u website allows LGBT travellers to view and access all services offered in tourism in Cape Town and across the rest of South Africa. All services are listed from hotels, restaurants, bars, clubs, sport, food, wine, and culture. Details are specific, with references from previous travellers. Prospective travellers can view, and book all travel requirements catering to their specific needs (Pink South Africa, 2016).

3.8.4 International Gay and Lesbian Tourism Foundation (IGLTA)

This foundation, which has members worldwide, supports members through its education, research and development programmes with a mission statement that reads: “We support tourism for all.” The foundation also supports initiatives for communities, leaders and initiatives to advance LGBT travel worldwide (IGLTA, 2018).

3.8.5 Triangle Project

Situated in the city centre of Cape Town, the Triangle Project is a non-profit organisation offering a range of services to the LGBTI community. The organisation, originally known as GASA 6010, was established by a group of gay men in 1981. A telephone helpline, counselling and medical services were established in 1982. In 1984 the health services incorporated HIV & AIDS-related matters. The organisation also assumes an activist role to ensure and uphold the constitutional rights of citizens through the services offered to LGBTI persons, their partners and families. The organisation changed its name to Triangle Project in 2016, while also extending its services to a black township in Cape Town, the first of its kind. Core services are health, support, community engagement, empowerment, research, and advocacy. The health services offered are support groups, public training and education, sexual health clinics, helpline, court support to survivors of hate crimes, counselling, community outreach, and a library (Triangle Project, 2018).

3.8.6 Health4men Support Group

Established in 2008 with centres in Cape Town and Johannesburg, this group focuses on HIV among gays, bisexuals and men who have sex with men (MSM). The services offered are community outreach programmes, sexual health, mental health, and HIV support, prevention and treatment services (Health4men, 2018).

3.8.7 Good Hope Metropolitan Community Church (GHMCC)

A place of safe worship celebrating diversity in Greenmarket Square, Cape Town, every Sunday, their mission is to affirm inclusivity regardless of race, sexual orientation, language and culture. The group also participates in Pride annually (Good Hope MCC, Cape Town, 2018).

3.8.8 Cape Organisation of Gay Sport (COGS)

This organisation is active in arranging and promotion sport activities for LGBT people, like rugby, hiking, squash (Cape Town Gay Community, 2018). Meeting with its members and followers throughout the year and playing different sports, the organisation communicates with its followers on Facebook under the name Cape Town Gay Social Sport Club with 1 054 followers.

3.8.9 Pride Shelter Trust

This non-governmental organisation (NGO), founded in February 2006, is a residential facility in Cape Town offering short-term accommodation to LGBTI persons in crisis. In existence for six years, the organisation has assisted over 700 people in their time of crisis or trauma as refugees, asylum seekers or LGBTI persons finding themselves homeless in coming out (Pride Shelter Trust, 2018).

3.8.10 Lunchbox Media

LunchBOX Media was established in 2009, specialising in gay advertising and marketing in SA. The organisation represents eight SA media owners and they do event sponsorship, social media, print, online, experiential marketing, branding, and cinema platforms. They develop individual gay advertising and marketing solution campaigns based on the client's needs and products. Some of the clients they engage with are Budget Car Rental, Distell, Ster Kinekor, Mercedes Benz,

Pezula Hotels, Bidvest Bank, *The Pink Tongue*, Renault, Red Bull, Mango Airlines, Protea Hotels and MambaOnline (LunchBOX Media, 2014).

3.8.11 Village Drinks - Gay Business Networking (Conversations)

The Village Drinks networking event is hosted monthly at upmarket and gay-friendly venues in and around the city of Cape Town. Village Drinks Cape Town is based on a similar concept in the United Kingdom. The events are hosted every second Thursday of the month at various venues across the City of Cape Town which are mostly gay owned. Businesses can market their business and services, whether a small company or individual offering a service to the LGBT market or the greater public. The events are attended by gay professional men and women who meet face to face with the aim of promoting conversations within the LGBTI community and to network. This is the only networking platform for pink businesses in Cape Town. The events allow attendees to meet in a social manner to share business concepts and ideas. Anyone from the age of 18 can attend and the event is open to all (*Cape Town Magazine*, 2014a). When the founder of Conversations relocated abroad, Village Drinks Cape Town started in October 2018, according to the Meetup website. The organisers charge an entrance fee, normally accompanied by a free drink sponsored and promoted at the event. To encourage a networking environment, introductory sessions are held where attendees exchange business cards or just introduce themselves. To keep the event interesting, prizes are sponsored by LGBT businesses or larger corporates. The prizes can range from beauty products, wine, and life skills coaching to a range of vouchers for different services and products. Marketing of the monthly events is on Facebook and on Instagram to its 2 426 followers (Village Drinks, 2020).

3.8.12 The Pink Tongue

Published by Independent Newspapers since 2007, *The Pink Tongue* is the only monthly community newspaper challenging homophobia by embracing sexuality and promoting gay lives and lifestyles (LunchBOX Media, 2014). It has a print issue of 15 000 copies per month and a readership of 25 000 readers, with gay writers covering health issues, travel, events, sport, profiles and news stories. It was free, and is distributed at gay and gay-friendly venues in greater Cape Town and nearby towns such as Knysna, Napier, Darling, Gordon's Bay, Tulbagh, Barrydale, Montagu, and Stellenbosch (IOL News, 2018). *The Pink Tongue* has since gone digital.

In Figure 3.6 below its important to the front page advertisement for Sorbet Man, a mainstream male salon offering a range of grooming services to men advertised in *The Pink Tongue*.

Catch Seal performing in Cape Town on Thursday, June 16 at the Grand Arena, GrandWest. See page 6.

Watch Albert Hammond performing Cape Town at Artscape on April 14. See page 6.

60% of newly diagnosed HIV+ men linked to hook up apps. See page 1.

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THE PINK TONGUE

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Tutu's daughter suspended after lesbian marriage creates conundrum

HADKEY HORNE

THE Reverend Mpho A. Tutu, daughter of Anglican Archbishop Emeritus Desmond Tutu has been unexpectedly suspended from the Desmond & Leah Tutu Legacy Foundation after she married her female academic lover.

Reverend Mpho Tutu tied the knot with her fiancée Professor Marceline van Furth, a professor in Pediatric Infectious Diseases at Vrije University Amsterdam in December 2013. The two wed in a tiny ceremony in the Netherlands.

Furth also holds an NEA in health care and is the Desmond Tutu Chair in Medicine at the university. Other notable credits include being an HIV/AIDS activist, who campaigns against poverty, racism, sexism, homophobia and transphobia.

According to reports by the City Press, Rev Mpho Tutu's suspension wasn't on the grounds of the same-sex marriage disapproval, but because because Van Furth has been closely involved with the foundation's affairs.

Van Furth's position of Desmond Tutu Chair of Medicine at Vrije University kept her closely related with the Desmond and Leah Tutu Legacy Foundation on special projects. So much so, that she is believed to have played a key role in securing a €2 million donation (€26.62 million) to the foundation from a Dutch lottery two years ago.

Though Anglican Archbishop Thabo Makgoba declined to be interviewed, citing constraints over what could be publicly disclosed because the issue is a pastoral one, his office did say that a decision was expected to be reached closer towards the end of the year.

Tutu was asked to step down from her position while an investigation is undertaken to assess the legal, financial and ethical implications of the couple's relationship on the foundation.

Though the same-sex marriage isn't the reason for the controversial suspension, it does play an integral part. According to an insider, even though Archbishop Tutu has come out in public support of gay marriage and previously said he would refuse to go to a "homophobic heaven," those close to church affairs told City Press Mpho Tutu's marriage had put the church in a very difficult spot.

"Mpho is a revered canon and this has implications for the church. You have to be reborn or unattached to continue being a gay priest in the church.

A question is her role in the church as a revered canon. There is nothing in the church's constitution about whether you can marry," said an insider.

Back in January, Tutu told City Press she was ordained in the Episcopal Church in the US and was "canonically resident" in the Diocese of Washington, DC.

"In terms of the canon, I must have the approval of my diocesan bishop to marry, which I have," she said.

"With regard to the Anglican Church, I imagine it will resolve its position on these matters in due course," said Mpho Tutu, who added that she was personally not involved in the discussions the Anglican church was having about its priests in same-sex marriages.

It is the second marriage for both women. Rev Mpho Tutu (51), who was previously married to US journalist Joseph Burns and has two daughters, is herself an ordained Episcopal priest and the executive director and founder of the Tutu Institute for Prayer and Pilgrimage. She is also the author of the book *Made for*

Goodness.

"Because her parents weren't in attendance of her marriage ceremony rumours persisted that the Archbishop and his wife were against the union. However, Mpho Tutu rejected suggestions her marriage did not have her parents' blessing, as they had never made public statements on any of their children's marriages, "so this is not a concern to us".

This is the second scandal to rock Rev Mpho A Tutu. Before she tied the knot with her new wife, she was best known for the scandal involving a trust in her father's name.

According to reports, in May 2013, Rev Tutu was accused of "hijacking" the Desmond Tutu Peace Trust, which had to be shut down to avoid humiliating the retired archbishop.

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- MANICURES
- PEDICURES

Figure 3.6: *The Pink Tongue* newsletter (Source: Researcher, 2019)

THE PINK TONGUE
WE SPEAK YOUR LANGUAGE

THE PINK TONGUE
WE SPEAK YOUR LANGUAGE
Luke Evans on being openly gay in Hollywood

10 000 copies distributed free in and around Cape Town

This free monthly publication for the Gay and Lesbian Community aims to challenge homophobia, appreciate diversity and develop a more inclusive society. This upmarket leisure and lifestyle publication has a content focus on topical news, entertainment, motoring and health and legal issues, as well as dining in and out with style. A monthly print order of 10 000 copies is available at selected and relevant venues in and around Cape Town on the last Wednesday of the month.

To advertise contact: **021 488 4133**
or email **laura.kurt@inl.co.za**

Figure 3.7: *The Pink Tongue* marketing advertisement

Source: Researcher, 2019

3.8.13 The Other Foundation

In consultation with the National Gay and Lesbian Chamber of Commerce (NGLCC), The Other Foundation recognised the importance of LGBT businesses and established a network, hosting its first workshop in Cape Town in April 2016. At the workshop an agreement was signed between the SA LGBT network (Igual, 2016) and the US National Gay & Lesbian Chamber of Commerce. The main policy agenda is driven by the recognition of international economic and development policy by “inclusive economic growth” and development approaches of “leave no-one behind”. The reason for the approach is to promote economic empowerment and participation and improve social inclusion and physical safety of LGBT people by providing networking opportunities. An MoU was signed, with quarterly meetings agreed upon supporting business networking (The Other Foundation, 2016:2).

3.9 Rebranding

Rebranding is a process of changing a corporate image and keeping customers informed of changes (Van Zyl, 2005:88). The aim is to change the marketing strategy of an established company to redevelop a new identity in the minds of consumers or any other stakeholders.

The benefits of rebranding, among others, are:

- moving with the times;
- a change in company strategy or a merger; and
- to reflect a change in the types of products for sale and the company’s branding (Daly & Moloney, 2004:33).

When companies embark on a rebranding exercise, it is important to have a plan of what the objectives and outcomes are. The plan should clearly outline the business objective and the process to achieve the goals of a place brand in the market (Govers & Go, 2009:17). An important activity for business is to reflect on the rebranding exercise after a year or two. The City of Cape Town has played a role in the branding of the Western Cape through renewed marketing activities. As stated, tourism destinations consist of products and services which are interrelated and fall under a geographical area (Kozak & Baloglu, 2010:155). This approach is supported by the continuous increase in the number of visitors. Tourist decisions are based on personal

experiences of past travel. Other forms are word of mouth, countries' sustainable programmes and political situations in respect of safety and security (UNWTO, 2017a:18).

In the City of Cape Town's Tourism Development Framework: 2013 to 2017 (CCT, 2013), it recognised that Cape Town did not have a strong brand image, and the challenges identified were the following:

- A lack of adequate marketing initiatives and the distribution of information in cultural heritage areas.
- There is an oversupply of luxury accommodation in Cape Town. Cape Town does not have a strong branding image.
- Tourism signposting needs improvement, particularly in lower income areas.
- The tourism system in Cape Town is fragmented with a lack of integration of public and private tourism initiatives.
- Tourism industry structures and governance are poorly defined.
- Human resource capacity and skills constraints.
- Insufficient accessibility for persons with disabilities.
- A lack of funding for new venture creation and upgrades to tourism SMMEs and entrepreneurs, particularly previously disadvantaged persons.
- Infrastructure (and tourism infrastructure) provision is uneven.
- Overregulation, that is, various laws and regulations hamper small businesses (CCT, 2013:87).

The marketing activities and initiatives were fragmented and needed to be integrated to form a consolidated brand image (Hughes, 2006:152). Marketing agencies were instructed to focus on branding Cape Town on strategic themes based on Cape Town's unique selling features (CCT, 2013:95). The strategic targeted marketing initiatives adopted focused on niche markets (CCT, 2013:126). Cape Town Tourism engages with the industry on all platforms. In 2014, the entity recognised innovation as a key avenue for engaging with people and launched its mobile app in June. This allowed information to be freely available when needed. In the 2015/16 financial year, a refreshed brand was launched with visitor-facing and industry brand aligned.



Figure 3.8: Cape Town Tourism refreshed brand logo

Source: Cape Town Tourism (2016:8)

The website had 2 million visitors with an increase of 16% on the previous year (Cape Town Tourism, 2017:10). All social media platforms, including Instagram, Facebook, YouTube and Twitter, also saw an increase in traffic with Instagram up by 220%. In May 2016, Cape Town Tourism refreshed its brand identity to remain ahead of the global tourism industry. This was done through reinventing the website to represent Cape Town Tourism as an organisation to remain relevant and refreshing its brand #lovecapetown (Cape Town Tourism, 2016:2). From the annual report, it is clear to see the marketing activities are social media driven. For the LGBT market, there are no rebranding strategies; however, an inclusive strategy was adopted by Cape Town Tourism.

3.10 Change in Pink Business

In November 2010, IGLTA became the first gay organisation to receive affiliate member status with the UNWTO. The purpose was to educate and engage with tourism leaders worldwide on the impact of LGBT travel and its economic impact of LGBT events (Hattingh, 2011:60). Besides the economic benefits, it was also to highlight progressive policies adopted by different countries, social benefits and associated benefits of tolerance, inclusiveness and diversity with the brand (Southall & Fallon, 2011:220). Tourism trends are affected by many factors, among others, cultural diversity, changing lifestyles and personal mobility. There is also a greater awareness of

responsible tourism marketing on aspects such as environmental issues, disease, natural disasters and sensitivity towards social issues. The second UNWTO report of 2017 (UNWTO, 2017b) notes the role, recognition and visibility of LGBT people in a global society and a shift in societal attitudes worldwide.

More importantly, the report focuses on three main groups in the destination marketing arena:

- Destinations marketing themselves on a global scale to the LGBT travelling public for the first time.
- Established Tourist destinations in the market looking to diversify their LGBT offerings.
- Both established and emerging destinations seeking to understand the profile and characteristics of LGBT consumers from new outbound markets (UNWTO, 2017b:13).

Its aim is to share characteristics of emerging markets and share best practices in LGBT destination marketing. In 2015, a group of global companies formed a coalition called 'Open for Business' to present their case that inclusive, diverse societies are better for business. Some of the businesses involved in the coalition were IBM, Ernst & Young, Barclays, AT&T, Accenture, LinkedIn, Mastercard, Microsoft, Google, PwC, Tesco and the Virgin Group, with the list increasing annually (UNWTO, 2017b:35). Initially LGBT persons preferred a targeted approach in terms of product and marketing approach (Southall & Fallon, 2011:222), however presently LGBT people prefer to be reflected as part of mainstream advertising, rather than be targeted or grouped apart based on their sexuality (UNWTO, 2017b:73).

The report also states that for businesses to remain competitive, they need to recognise:

- different generations of LGBT travellers and their changing needs;
- inclusion and diversity in tourist destinations;
- diversity of products and destinations; and
- marketing strategies to attract the LGBT traveller (UNWTO, 2017b:32,60,75,100).

This finding supports the findings of Visser (2014:469) on the de-gaying of De Waterkant, where the village is changing in its identity and with LGBT people wanting to be part of the mainstream. It is important to note that mention is made of this unsustainability in Visser's 2003 article, where Shapiro (interviewed on 14 June 2001) and Hogan (interviewed on 14 June 2001), voiced concerns relating to De Waterkant as a gay village in comparison with European cities or Mediterranean resorts like Ibiza (Visser, 2003a). De Villiers, another participant, also was of the view that De Waterkant was glamorised beyond on what it could offer (Visser, 2003a:184). According to Hattingh, the De Waterkant village was a "victim of its own success", owing to change in that it 'de-gayed' itself. This was supported by a change in the area because of mixed leisure spaces, dating apps, technology, legislation legalising same-sex marriages, gentrification, progressive attitudes, and a decreasing tolerance for gay nightlife by its residents (Hattingh, 2019:141).

The discussion above underscores the economic opportunities for South Africa in niche markets. The opportunities of the niche tourism market through economic stimulation and the creation of jobs is encouraged through local and international regulatory tourism bodies thereby acknowledging the LGBT sector. With a minimal marketing budget, Cape Town drew the attention of the international market, supported by the MCQP dance parties in its early days. Considering the importance of gay spaces for LGBT travellers (Blichfeldt et al., 2013:473) in which to stay, party and eat, the De Waterkant village attracted large numbers of LGBT people from all over the world. As the market grew, additional support services were required to support and sustain the industry, ranging from infrastructure, leisure and health services. The Pink Map played a crucial role in informing visitors of ideal places to visit or any additional support needed, like health services. This supported the message of an accepting society, thereby creating a safe gay space (Hattingh & Spencer, 2017:4). The Pink Map also supported the LGBT sector by formalising the industry with the publication of services offered in a niche area, thereby informing industry of its existence. The marketing of the map through LGBT businesses and the *Mail & Guardian* newspaper ensured maximum reach through informing the niche. Business support is offered by a business network initiative held monthly for small and large businesses to connect and market themselves. The expansion of the LGBT market extended to Knysna, a small town on the Garden Route, confirming the business opportunities in the Western Cape. Additional marketing support came with the publication of the *Pink Guide*. All the activities and services in this chapter are essential in sustaining the LGBT market, but how do the niche businesses and organisations

come together to support each other? As the organisations and businesses mentioned in this chapter appear to operate independently or as part of an organisation, how does the niche collectively come together for sustainability in the pink niche? Through various independent and government bodies, Cape Town has recognised LGBT people; however, the future of the niche market could be affected by barriers to growing their business, commonalities in the niche and mainstream market, and the future of the niche due to societal change.

The UNWTO LGBT (UNWTO, 2017b) report recognises the market is here to stay and recognises the LGBT market has transformed since it first came into being. This chapter has demonstrated the evolution of the industry that came about through a business idea, resulting in a niche serving an LGBT community. The marketing of the area occurred through the hobby of an individual, with the Pink Map advertising businesses in the area and by word and mouth within the LGBT community. Additional services were offered such as health clinics, hotels, guesthouses, steam baths, and bars, thereby reinforcing the concept of the destination amalgam. The marketing efforts shifted from the Pink Map to business websites, social media and the tourism regulatory body, Cape Town Tourism. Additional marketing efforts were through NGOs formed with international funding through pamphlet distribution and monthly business network events hosted for small businesses who operated not only in the LGBT space.

3.11 New Traveller Typologies: LGBTQ travellers breaking out of the niche

When conducting research, the researcher attended a panel discussion on 'Gay Travel Insights, Lessons for LGBTQ+ Marketing' at the World Travel Market Africa exhibition in Cape Town on 11 April 2019, which consisted of panel members from the tourism sector, including the IGLTA representative for the African continent. The lead panellist at the discussion (World Travel Market Africa, 2019) owns and manages a travel agency that had conducted a study of LGBTQ+ travellers, and differentiated travellers as follows:

Table 3.3: LGBTQ categories

Category	Description
Generation X (middle age – 42)	Proudly gay, seeks welcoming and inclusive destinations.
Late Bloomer (millennial–31 years old)	Doesn't care if people know he is gay, takes notices of services on offer and notices gay businesses.
Millennials (about 35 years old) & Generation X	Proudly gay person and would travel to countries with regressive legislation and not be scared to express himself.
Generation Xs	A couple who has been together for a long period of time. Loves nature and would travel in groups of 4 – 6 people.
Silent Influencer	Someone in their 50s or 60s who is gay and has a brother or sister who is married with two children. The entire family can travel, and the gay family member would recommend, suggest and decide on the holiday destination for the entire family due to extensive prior travels, maybe for work or just vacation. This is an LGBTQ traveller who influences the family.

Source: Fiddler (2019)

The discussion was on who in the tourism industry caters for LGBTQ+ travellers. The point of the discussion was, how does a business capture and market to these potential customers? It was noted by a panel member that only 17% of gay couples seek out nightlife when travelling. The question was asked, where do the rest of the travellers go on holiday? (Fiddler, 2019). The panel leader informed the attendees he is gay with a partner and an adopted child. When travelling, they need to consider where to travel and where to stay as a family. He asked the question, who in the tourism industry caters for them as a family? Further into the panel discussion, the IGLTA representative highlighted the organisation is in talks with the Tourism Grading Council to implement a training programme whereby staff in the hospitality industry could undergo sensitivity training.

The silent influencer (refer to Table: 3.3 above) supports the theory of societal change and change in the pink niche in that it is a category overlooked by businesses and marketers. As the name indicates, the silent influencer is a traveller who is gay, in his 50s or 60s, who has travelled, and has a wealth of experience in travelling to different destinations and staying at different accommodation facilities. The travel could have been for leisure or work. The silent influencer has siblings who are married – brothers or sisters with or without children. This person could influence a family in many ways in respect of where they travel, where they stay, what tourist sites they see, and how often they travel – all influenced by past experiences. When travelling as a family with a gay person, the hotel is determined by way of being gay friendly; alternatively booking an Airbnb, shifting from a corporate chain of hotels or gay-only hotel. The same principle is applied when eating out or participating in activities, as whatever activity is chosen, it needs to be inclusive; thus, gay bars, nightclubs and cafés are not the preferred choice. The social space is determined by the travelling family, as the silent influencer may no longer be keen to frequent gay spaces because of age or no longer be interested in gay-only establishments as that experience has passed. Another scenario could be that the silent influencer socialises intermittently in the pink niche, thereby changing the profile of a gay traveller and spaces at different times. Socialising intermittently in different spaces changes the services required at that specific time, and could therefore transition to a different market, for a specific service can occur at any time. The planning process could prove to be challenging for marketers and businesses when operating a business.

3.12 Summary

The pink tourism niche in Cape Town became a recognised by the City of Cape Town and Cape Town Tourism owing to its economic impact and number of jobs created. Promotional and marketing material published recognises the niche by mentioning the gay village De Waterkant and using images of same-sex couples in information brochures. The annual MCQP became a world-recognised event on the LGBT calendar and hosting the first International Gay and Lesbian Travel Association conference thrust the city into the international spotlight. Support to the niche is explored through the destination amalgam, discussing the key elements in relation to attractions, events, accommodation, amenities, access, ancillary services, cultural and heritage attractions in the city of Cape Town. All these elements are viewed as key in supporting the tourism industry. With these elements in place, the LGBT niche is further supported through different organisations like religious groups, health clinics, websites, networking events,

publications, and a homeless shelter. The establishment of these LGBT services confirms the niche's place in the tourism sector. In Cape Town, the formation of the gay village occurred in De Waterkant, where an array of establishments serving the LGBT market opened. Being a liberated country and hosting the 2010 FIFA World Cup™, citizens attitudes and social acceptance became relevant for the international tourist. As social spaces changed, the need for businesses to remain relevant had to occur. The gay village changed owing to gentrification and businesses closing and relocating. In reviewing literature and understanding the current state of the gay niche, this study explores the current state of the pink niche and whether the market is still relevant. The new traveller in the LGBTQ categories that emerged through attending the World Travel Market conference suggests the tourism sector needs to recognise the change in its market. The industry needs to acknowledge how the market has changed because of social media and its platforms, not just for social reasons but also how travellers engage in the industry when considering holiday options and making reservations, and how decisions are influenced. In its short time since the development of social media platforms they have begun to disrupt the tourism sector. Cape Town Tourism has recognised this in its relaunched marketing approaches through media platforms. The next chapter discusses the research design and methodology for this study.

CHAPTER 4: RESEARCH DESIGN AND METHODOLOGY

4.1 Research Methodology

4.1.1 Introduction

After reviewing literature and providing an overview of pink tourism businesses in Cape Town, this chapter focuses on the methodical approach adopted for the primary research. Options regarding a suitable research approach and design had been considered and a suitable study design adopted, including the data-collection method, sampling approach and targeted audience. Based on the aim of the study, the sampling method and interview schedule was designed and constructed. In the latter part of the chapter, the ethical considerations, research limitations, challenges, and the researcher's and participants' reflexivity are discussed.

4.1.2 Research Approach

This study utilises a phenomenological research philosophy and an exploratory design through qualitative research methods. Data was collected using semi-structured interviews with 12 participants. This included interviews conducted with managers or business owners as identified through first contact, either via email or telephone call. The pink businesses were identified through pink publications and websites: *The Pink Guide*, *The Pink Tongue*, *GayCapeTown4u*, pink published articles, and the researcher's knowledge of the pink market. The study was focussed on the De Waterkant area referred to as Cape Town's "gay village" and pink businesses beyond the village predominantly in the CBD and along the Atlantic seaboard. The interviews were conducted and recorded at the 12 participants' places of work in April 2019.

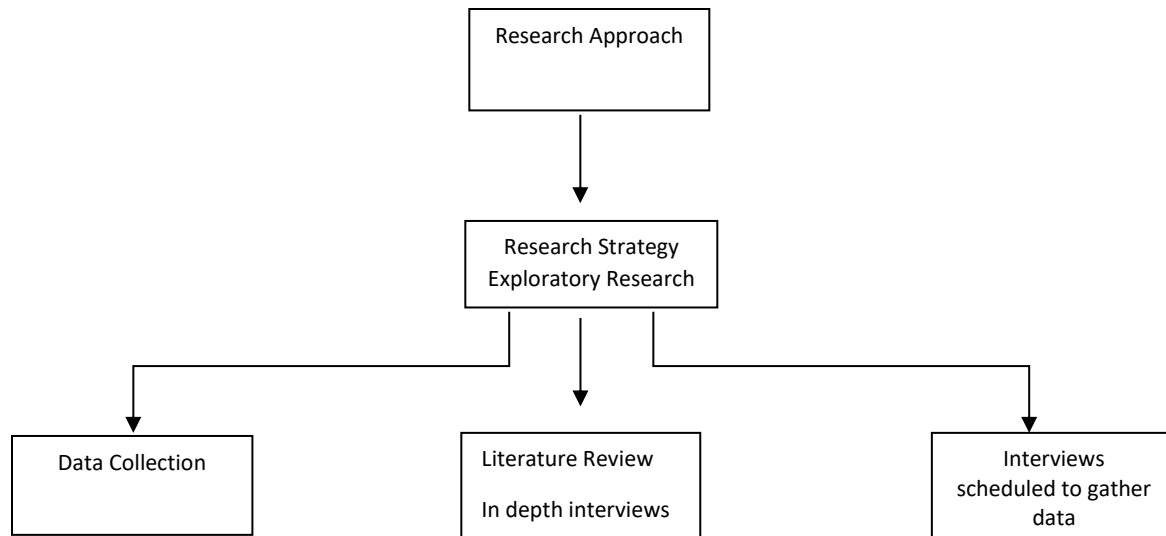


Figure 4.1: Research approach
Source: Marshall & Rossman (2006)

4.1.3 Research Strategy

An exploratory research approach was used to gain confidential information on how the pink tourism sector can diversify its niche product offering to expand into the mainstream leisure market, as well as to gauge opinions and any information on the rest of the industry within the pink tourism sector. This form of research is flexible, adaptable to change and unstructured, and could be used as a building block for future research and provide direction for more formal research (Hammarberg et al., 2016:499). The chosen methodology was based on participants' ability to answer the research questions. Participants were interviewed from different types of businesses in the LGBT industry to determine if there were any commonalities and patterns in the response.

4.1.4 Qualitative Research

Qualitative research was done, as this approach allows researchers to get an inner experience of participants in the workplace, understand their meaning in responses relating to work experience, and their view of the industry and how the tourism industry has changed (Punch, 2005:200). This

approach is appropriate because it allows the researcher to engage with professionals who work in the pink tourism industry. The questions were open-ended, allowing the researcher to adopt a more fluid, evolving and dynamic approach as the focus would be to extract information, sometimes of a sensitive nature (Corbin & Strauss, 2008:13). The benefits of this approach are that participants can provide historical data and information, and it allows the researcher to control the questioning and probe where relevant (Creswell, 2014:191). To add to the richness of the data, the aim was to gain information on the pink tourism businesses to learn about the current state of the market, explore marketing strategies, investigate synergies between pink and mainstream leisure market opportunities, and explore the viability of a pink market in the context of social change in Cape Town, all relating to the aim and objectives to the study. This is the focus of the section that follows.

4.1.5 The Target Population and Sampling

The approach to the target population sampling method was purposive, in selecting participants across different business categories in the pink niche in Cape Town. The sample ranged across businesses in the accommodation, theatre, nightlife and restaurant sectors. The reason for selecting these organisations and publications is because the businesses in the pink sector advertise in or are affiliated with the pink tourism sector. The participants' experiences and opinions in qualitative studies are more important than their numbers (Hattingh, 2019:138), with a sample size of up to five interviews being sufficient for the study (Creswell, 2014:189). Guest et al. (2006:61) argue that sample saturation occurs within the first 12 interviews. Further, they review studies that conclude as few as five interviews as acceptable as a sample size. As the sample size of the pink niche businesses is limited and diminishing each year (Visser, 2014; Rink, 2016), potential participants were identified from existing pink publications.

4.1.6 The Study Population and Data-Collection Techniques

The study population data-collection technique comprised of scheduled semi-structured interviews with businesses that operate or had operated in the pink niche. A table with a list of the participants is provided below.

Table 4.1: List of research participants

Participant number	Years in business	Occupational title	Type of business
Participant 1	26	Owner	Restaurant
Participant 2	14	Owner	Guesthouse
Participant 3	9	Owner	Nightclub/bar/drag
Participant 4	11	Owner	Restaurant/drag shows/party venue
Participant 5	9	Client manager	Holiday & rental accommodation
Participant 6	11	Owner	Gay nightclub/bar
Participant 7	20	Manager	Guesthouse
Participant 8	26	Manager	Restaurant/bar
Participant 9	11	Manager	Boutique hotel
Participant 10	4	Owner	Cabaret theatre
Participant 11	8	Owner	Restaurant/café
Participant 12	14	Owner	Boutique hotel

Source: Researcher construct from research database, 2019

The sampling method was purposive across a range of businesses from the pink sector in the form of interviews with participants identified through IGLTA, *The Pink Tongue*, *Gay Guide to Cape Town* and Cape Town Tourism (Creswell, 2014:189). A target of 12 interviews was set and achieved with a cross-section of participants in the accommodation, nightclub, bar, restaurant and theatre industries. Further information was sourced in pink publications for the LGBT community. The reason for selecting these organisations and publications is because the businesses in the pink sector advertise or are affiliated with the pink tourism sector.

4.1.7 Gathering the Data

The researcher approached businesses in different sectors of the pink sector, bearing in mind those businesses that had transitioned and been longest in the sector. Initial contact was made through emails, in which I introduced myself, provided a brief outline of the study and indicated

what information would be required from participants. All participants interviewed were business owners or managers and had some knowledge of how to run a business. Nil responses were followed up a week later with an email or telephone call. Interviews were scheduled in April 2019 at a predetermined time and venue with participants. A short brief was given to the participants regarding the consent form, the purpose of the study, and how the questions were structured into three categories. The importance of anonymity and confidentiality was stressed to ensure participants felt at ease to express themselves and share as much information as possible. All interviews were conducted in a venue agreed upon by participants, recorded on an iPhone, and saved onto an external hard drive for transcribing. The data was outsourced to a transcriber who transcribed the interviews by typing the notes captured as recorded in the interviews. The study initially aimed to complete a minimum of eight interviews to reach the midpoint of a suitable sample size of five and 12 participants as suggested by Creswell (2014:189) and Guest, et al. (2006:61). For this reason and in light of the view that there are no concrete rules guiding sample size in qualitative inquiry (Patton, 2002:244), the researcher used the midpoint of eight interviews as an initial guide to reach an adequate sample size. It is important to note, however, that the sample size for this study was largely determined by the emergence and saturation of data. After 12 interviews, no new data was emerging. The sample does not lend itself to generalisation to a larger group, because the sample considered the expert viewpoints and in-depth viewpoints unique to the participants of this study (Devers & Fanckel, 2000: 263-271; Wiid & Diggines, 2013:180-191).

The entire interview process went smoothly, with all participants engaging with the interviewer and not offended by the questions. Information was freely shared and a great sense of passion and commitment to their businesses was evident. There was only one participant, who in spite of answering all questions, was not very engaging in the interview.

4.1.8 Semi-Structured Interviews

The primary data-collection method was conducting in-depth interviews as they provide historical qualitative data which is reliable (Creswell, 2014:191). Using semi-structured interviews with predetermined questions guides the process but also allows the participant to expand where necessary. The interviewer can also probe with a follow-up question or seek clarity on a particular question (Flick et al., 2004:5). The interviews were conducted in English in a venue of their choice,

allowing participants to feel in control of information provided and be at ease (Marshall & Rossman, 2006:61). This technique also allowed participants the freedom to express their views in their own terms, as well as relate their experiences in the tourism industry. Interviews allowed for a more personal relationship to develop, allowing for information to be shared that wouldn't normally have been. The questionnaire was prepared ahead of time, allowing the researcher to be prepared and competent during the interview, without distractions. This also allowed for the semi-structured interviews to take new directions based on participants' responses. Data were collected through 12 scheduled face-to-face semi-structured interviews conducted with each participant. Open-ended questions were asked in attempting to solicit as much information as possible, with 40 minutes allocated per interview. Participants were asked about their experiences, how long they had been in the industry, when the business opened, their approach to managing the business in the pink sector, support from professional bodies, and most importantly, if they thought the pink niche was still relevant. The interviews were recorded with each participant's permission and a consent form signed.

4.1.9 Semi-structured interview questions

The semi-structured interview questions (Appendix A) were structured in way to solicit as much information as possible from the participants, but were also flexible enough for alternative perspectives to emerge. Creswell (2014:186,189) contends that opinions and experiences of participants in qualitative studies are more important than the number of participants. Participants were the managers or owners in the business, except one participant, who had since sold his business in Cape Town but still operated the second one outside Cape Town. All the participants had over five years' experience in the business, while some had served on professional bodies in the LGBT community. Participants were responsive and provided information without hesitation, except for one participant in the accommodation sector who was not forthcoming and gave one-word answers. Questions were asked as per the questionnaire, although sometimes explanations were needed, or examples were asked for. The conversation was allowed to flow; however, the interview was brought back on course by asking key questions on the questionnaire, keeping the objectives of the study in mind.

4.1.10 Data Analysis

A thematic analysis which pinpoints, examines and records themes was used by sifting through data, looking for patterns across data collected (Braun & Clarke, 2006). The framework of analysis was developed through the literature review, using key themes. The data was analysed at a micro level (all participants) and at a macro level, examining government data at provincial level.

Analysis of data used Creswell's process of data analysis (Creswell, 2014:152) and coding analysis (Thomas, 2006:242).

The Data Analysis Spiral

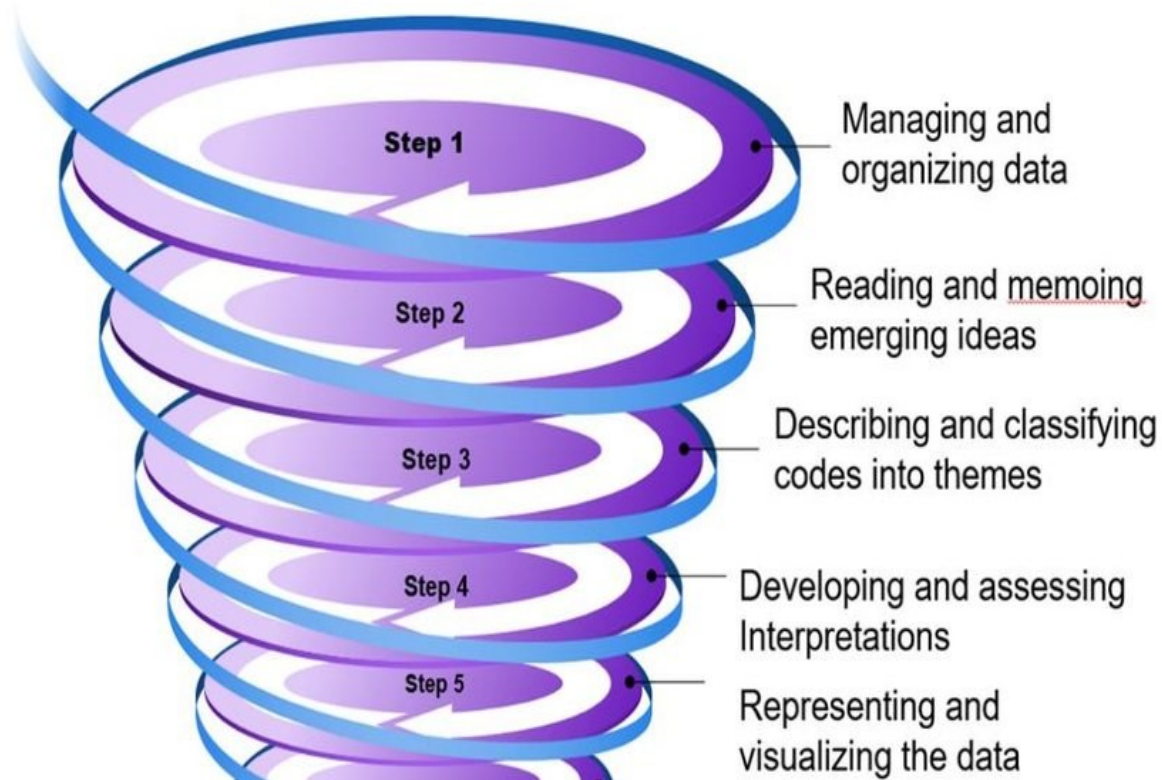


Figure 4.2: The Data Spiral Analysis
Source: Creswell and Poth (2018:186)

1. Organise and prepare data for analysis

This process comprises transcribing the interviews conducted, typing up notes captured, and arranging information data into different types based on sources of information.

A database of the 12 participants was created, recording name, company name and address, phone number, position in company, appointment date and where information was obtained. The 12 interviews were recorded, dated and filed on a laptop, with copies saved on an external hard drive. All transcripts of interviews were coded before being sent to transcribers to ensure anonymity. The recordings were emailed, and transcribed notes were received after ten working days. When the transcribed notes were received from the transcriber, they were verified against the database of the 12 participants' company names, dates and times of interviews conducted.

2. Read through all data

In this process, one gets a general sense of information provided, patterns start emerging from what participants are saying, and the credibility of information is validated. Reference is also made to notes taken during the interview.

The researcher then worked through the transcribed interviews, highlighting key words, comments and phrases, and completing this process twice. On completion of the process, the researcher then grouped comments made by the participants on A3 sheets of paper called Set 1. At this stage there were ten headings identified after grouping the comments. After this, the researcher repeated the process which was scribed onto A3 sheets called Set 2. Further reference was made to the researcher's notes for comments, key words and phrases emerging from each interview. Key words emerged which were identified and highlighted in colour on the researcher's worksheets.


3. Coding

This is organising the data by breaking it into chunks by creating a table. Commonalities are identified and clustered together. The topics are allocated codes with descriptions and a pattern emerges with codes or new ones will emerge. The inductive approach supports the analysing of qualitative research in that it allows the theory to emerge from the data.

The steps observed were:

- The raw and extensive data put into summary
- Establish links between the research objectives and summary findings from the raw data
- Develop a theory about the experiences and processes found in the data (Thomas, 2006:238).

Table 4.2: The coding process in inductive analysis

<u>Step 1</u>	<u>Step 2</u>	<u>Step 3</u>	<u>Step 4</u>	<u>Step 5</u>
Initial reading of data	Identify specific text related to objectives	Label segments of text to create categories	Reduce overlap and unrelated data among the categories	Refine data into themes
				
Many pages of text	Many segments of text	30 to 40 categories	15 to 20 categories	3 to 8 categories

Source: Adapted from Thomas (2006:242)

The process the researcher followed was systematic and detailed, guided by a close and systematic reading of raw data. It involved a process of familiarisation of data by repeatedly reading through transcribed notes and highlighting key words in each line. Once completed, the key words, comments and phrases were transcribed onto A3 pages under headings guided by

the objectives of the study. Ten thematic headings were revealed. This process was repeated onto a second A3 page, where a further review was conducted in referring to the objectives of the study. Through this process, codes were generated through an inductive method, and themes were developed and further revised. This process reduced the thematic headings to five. The comments, key words and phrases under each heading were scanned for commonalities and alignment with the study objectives. In this way, themes were generated by the data, rather than by a pre-determined hypothesis from the researcher. The researcher's field notes, written down after each interview, were also consulted and cross-referenced in the validation of themes. Six themes emerged after coding the data. The six themes explored below could possibly provide a framework for the transition of pink businesses to the mainstream. Verbatim quotations are included to provide support to the themes that emerged.

The themes that emerged were the following:

- Disruptions in the marketing mix
- Diminishing support from tourism bodies
- Shifting media platforms
- Challenges in the niche
- External factors

4. Themes and analysis

In this step, a description of the themes and analysis is given. The description is detailed regarding information about the pink businesses, in revealing or looking for themes or categories. A narrative is a means of presenting the findings of the analysis, grouped in a chronological order with themes, subthemes and how they may or may not interconnect.

From the concluded analysis, the emerged themes formed the framework for possible reasons why pink businesses had transitioned to the mainstream. The themes were informed by the objectives of the study through identifying key words, phrases and verbatim responses by participants.

4.1.11 Themes

The themes identified below are discussed with brief comments on their potential importance to the study and further explored in Chapter 5.

Theme 1: Disruptions in the marketing mix

This is an important activity for the sustainability of any business. This could speak to how businesses promote and advertise their business. In addition, it could reveal whether business owners understand key business practices, such as planning, budgeting and promoting services. The marketing of services is important in a niche as it serves a particular need for a specific audience, in this case, the pink market.

- ***Monitoring marketing activities***

The monitoring and analysing (Newby, 2016) of marketing campaigns is important in that it provides data for a company and can be used for future reference. A successful campaign also indicates to a business the budget was well spent. Establishing whether businesses monitor marketing campaigns could possibly indicate whether they understand the importance and benefits. Why businesses don't monitor marketing campaigns could also reveal a wealth of information for future research.

Theme 2: Diminishing support from tourism bodies

A professional body is important as it plays a supportive role and allows like businesses in the industry to support one another and share best practices and possibility resources. Information could be revealed on how businesses interact with these bodies and how better they could serve the niche.

Theme 3: Shifting media platforms

This promotes a business and could reveal which media platforms the niche is engaging in. Valuable information could be shared on which media platforms are used. The traditional media platforms could also be explored.

Theme 4: Challenges in the niche

Challenges in the niche could reveal what challenges businesses are experiencing and whether they are similar to those of other businesses. Participants could reveal information that is not published, such as sociological issues, business challenges, and whether support provided is sufficient.

Theme 5: External factors

This could provide insight into what has changed since the niche came into existence, how is the niche experienced, and what are the changes. How has this changed for businesses in how they view the business and its market, what did they learn, and how do they plan for the future? This could reveal whether the niche is still relevant.

Interpret the larger meaning of the data

The data could illustrate future marketing strategies for the pink niche, at the same time addressing transitions to the mainstream leisure market. In the next chapter, a data analysis is done by discussing and interpreting the five themes. Where possible, verbatim quotations are included, adding to the richness of the data.

4.2 Ethical Considerations

Ethics clearance was granted under CPUT Clearance Certificate 2107FBREC444 (See Appendix B). Ethical issues were taken into consideration by the researcher as the data collected was of a sensitive nature and confidential. It was important for the researcher to protect the participants, develop a form of trust with them, guard against any misconduct or impropriety, and obtain their cooperation (Creswell, 2014:209).

When starting the research, appointments were scheduled telephonically with the business by commencing with an introduction, followed by explaining the process. A suitable date and time were scheduled at each participant's convenience and venue of choice. The participant was taken through the interview process and put at ease. This was important, as the researcher had only one opportunity to elicit as much information as possible. Participants were informed all information received would be confidential, and they had the option of remaining anonymous.

All participants were informed of the study by the research information sheet which provided information on the purpose and objectives of the study. Once informed of the nature of the study and their participation in it, consent was verified before undertaking the data collection. Communication was open and clear to ensure participants responded effectively and as accurately as possible. The research was free from cultural bias by taking into account participants' identities. Therefore, no harm was experienced by the participants in terms of race, gender, culture, and religion. Semi-structured interviews were conducted in English. Furthermore, given the profile of the participants, the research process protected them from harm to their businesses and business interests. The participants' anonymity and confidentiality were assured, and if requested, information provided would be kept strictly confidential and be used solely for the intended research project. Participants were informed they could withdraw from the research at any time. At all times the ethics code of the Cape Peninsula University of Technology (CPUT) was adhered to.

4.3 Limitations of the study

Although Cape Town has been labelled the gay capital of Africa, the number of stakeholders in the pink niche is smaller in comparison with mainstream tourism market (Visser 2002:87; Rink,

2016:28; Hattingh, 2019:134). Owing to the unique context of this niche market, findings may be applicable to similar markets and contexts.

4.4 Summary

The research for this study adopted an exploratory design by conducting semi-structured interviews to determine the current state of the pink niche and whether pink niche businesses still have a *raison d'être*. The semi-structured interview approach allowed the researcher to experience participants in their workplace where they felt comfortable, allowing for experiences, industry knowledge and opinions to be shared. Participants completed a consent form and the ethical considerations were discussed. This approach allowed for information of a sensitive nature to be shared. The 12 businesses comprised a cross-section of participants who either had operated or were still operating in the niche. The businesses were identified from pink publications and websites, and those known to the researcher. The data was analysed following Creswell's data-analysis steps. The coding was done through an inductive approach, with six themes emerging. In the next chapter, the data is further analysed and discussed.

CHAPTER 5: RESULTS AND DISCUSSION

5.1 Introduction

The findings of the qualitative study are presented in this chapter including an analysis of the data generated through in-depth interviews with 12 key informants. Semi-structured interviews were conducted with participants from businesses in the niche pink tourism sector of Cape Town. The sample included participants from boutique hotels, restaurants, bars, nightclubs, and a theatre in Cape Town's CBD and the Atlantic Seaboard, an area popular with LGBT tourists, and considered the gay village of Cape Town. The analysis of the findings explores the steps and/or processes that businesses have undertaken to transition from a pink niche tourism market to the mainstream market, in accordance with the objectives of the study. According to Leedy and Ormrod (2005:144), qualitative data derived from interviews can reveal a wealth of information, as the researcher is able to further probe responses relating to any aspects of the business based on facts, personal beliefs and perspectives, motives, present and past behaviours, standards for behaviour, and reasons for actions or feelings. The data were analysed by means of a systematic approach, following Creswell's steps for qualitative data analysis (Creswell, 2014), supported by Thomas (2006). This chapter furthermore discusses the results drawn from the data, utilising a theoretical lens from existing literature.

5.2 Geographical Extent of The Study: Pink Businesses Beyond the Gay Village

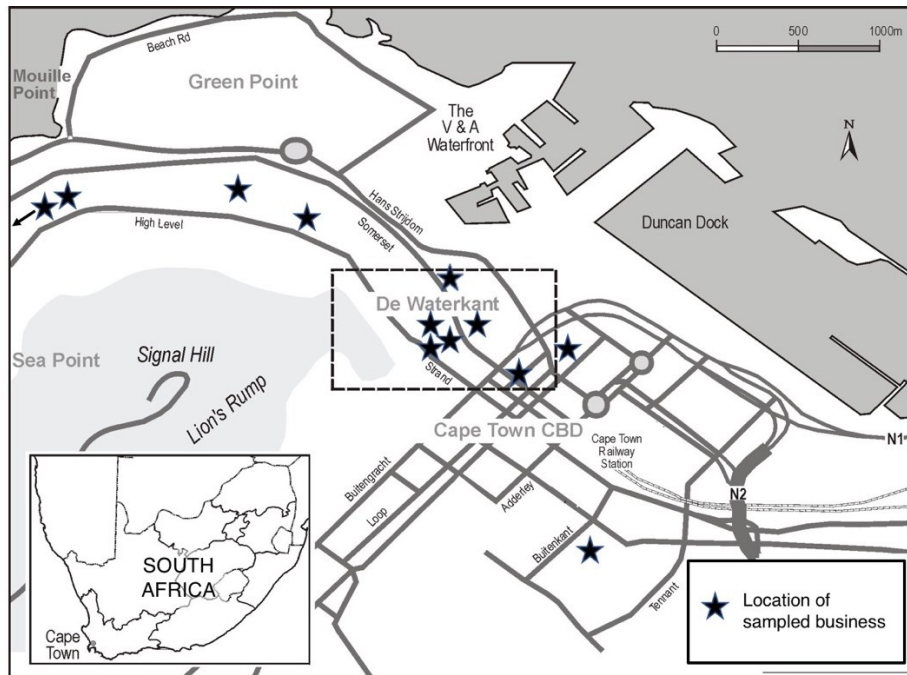


Figure 5:1 Location of sampled pink niche tourism businesses

Source: Researcher, adapted with permission from Rink (2016:22)

While this study focuses on the pink tourism niche in Cape Town, more broadly, the niche itself has developed and grown within an inner-city urban enclave known as De Waterkant, also referred to as Cape Town's 'gay village' as represented in Figure 5:1 above. Sampled businesses were located across Cape Town, despite De Waterkant's providing an important backdrop to the pink tourism niche and serving as the incubator for its development. Since the development of the pink niche, LGBTQ businesses have spread from the original gay village across the city. De Waterkant is situated on the edge of the Cape Town CBD and is a residential and mixed-use commercial area. It is commonly known as the De Waterkant Village and is 0.4 square kilometres in size (Rink, 2016:21; Hattingh, 2019:137). The area changed during the 1980s and into the 1990s, when it became populated by gay residents, tourists and businesses, framing itself into a self-styled gay village (Rink, 2016:22). Despite the limited number of gay leisure facilities, the area soon developed as a 'gay' nightlife area (Visser, 2003a). As noted by Hattingh (201:137-138), the de-gaying' of gay villages has relevance in Cape Town. Gay businesses and residents

have disappeared, with buildings being replaced by modern office and apartment blocks with onsite retail shops (Visser, 2014; Rink, 2016). This space is now populated by mainly heterosexual couples and their children, different from when it was frequented by exclusively gay people in the late 1990s (Rink, 2016:21). This study revisits the gay village during this 'post-gay village' era, interviewing businesses in the 'pink' niche tourism sector still operating within the area and the neighbouring Atlantic Seaboard, but that have transitioned to the mainstream in terms of product and service offerings. The views and opinions of the existing pink niche are expressed by the 12 participants in the five themes below.

5.3 Overview of Participant Industry Sectors

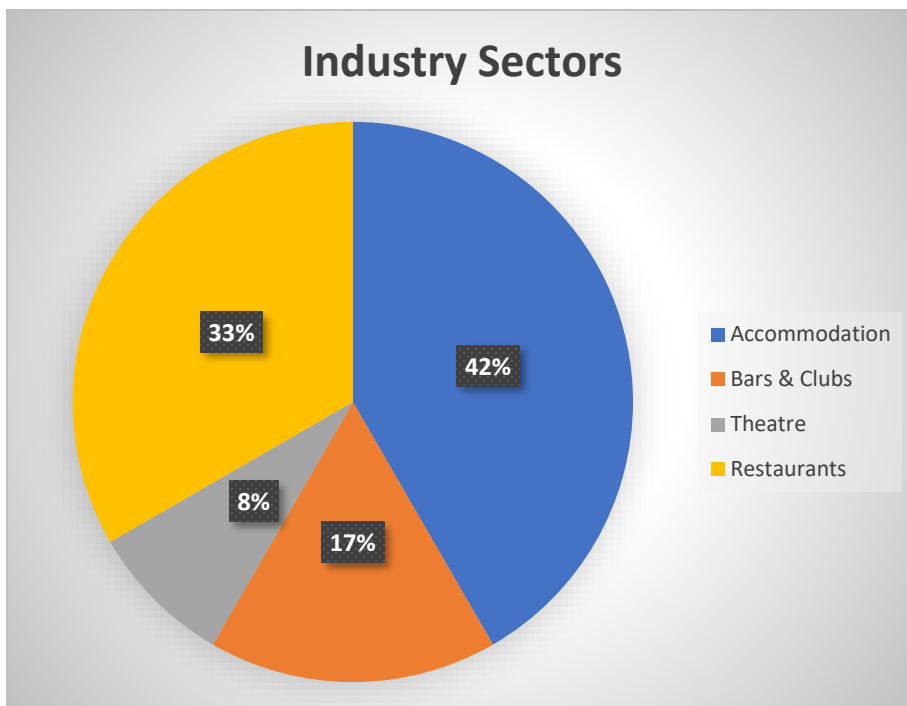


Figure 5.2: Chart of industry sectors represented in the study
Source: Researcher construct from data research (2020)

Figure 5.2 above indicates the tourism industry sectors represented in the study. There was no predetermined target per sector; however, the viewpoints of a variety of sectors of service providers were collected through purposive sampling. All participants were in senior level

management roles at the time of the research, with eight owners and four managers. The participants' management experience ranged from 4 to 26 years. The accommodation sector is the largest represented in the sample, at 42% of participants; bars and clubs at 33%; restaurants at 17%; and theatre at 8%. Additional qualitative insights and information were collected as the researcher attended the World Travel Market Africa exhibition in Cape Town from 10–12 April 2019, where a panel discussion on 'Lessons for LGBTQ and Marketing' was held (World Travel Market Africa, 2019). The information shared by the panel contributed to the marketing approaches that could be considered by businesses in the pink niche tourism sector, as the session was attended by a cross-section of LGBTQ business owners, tourism marketing professionals and industry stakeholders.

5.4 Emergence of Themes

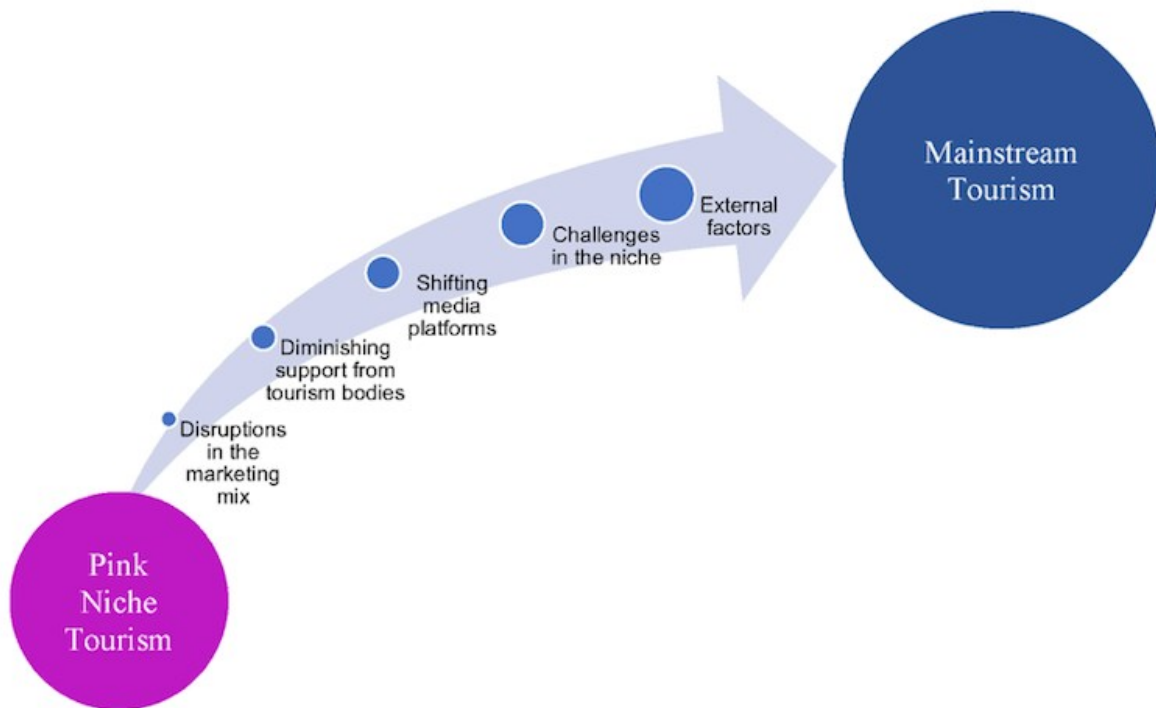


Figure 5.3: Emergent themes from the data analysis
Source: Researcher

5.4.1 Emergent themes

Five themes emerged from the views expressed from the 12 participants after the analysis of the data. Figure 5.3 highlights the five emergent themes. Through the emergent themes, the experiences, challenges and opportunities that participants shared in their market transitions are revealed. Those transitions are further conceptualised below through push and pull factors. The themes furthermore reveal the issues participants experience in transitioning from a pink tourism segment to mainstream tourism.

5.4.2 Theme 1: Disruptions in the marketing mix

The marketing activities of a business are the cornerstone of sustaining its livelihood (Obermiller et al., 2008:22). In this study, the livelihood is driven by jobs and the economy for businesses still operating in the niche. These activities are about creating, managing and understanding relationships among various participants in the production chain through various channels, ending with the final consumer (Möller & Wilson, 1995:1). Participant 6 was vocal in his business's marketing approach, saying, "So like instead of boxing them, they almost kind of need to be packaged as one rather than individual things." The participant is referring to the range of leisure services offered to the pink niche market. The statement is clear: the participant understood the diversification of services and product offering to a wide range of potential customers to service the niche. This is driven by a marketing plan inclusive of the marketing mix known as the four Ps: product, price, place, and promotion (Coon, 2012:515; CCT, 2019:326). Engagement with the range of elements of the marketing mix varied across the sampled businesses, yet all in one way or another have experienced disruptions in how the marketing mix has been applied in their market transitions. In the following paragraphs the disruptions and resulting changes in each element of the marketing mix across the sampled businesses are further explored.

5.4.2.1 Price

For some businesses in the niche (Participants 1, 9 and 11), the message promoted to customers is 'value for money and price', and therefore they were conscious of increasing or changing prices to maintain their customer base. As Participant 4 said:

We are trying to simplify and trying to... make it as cost effective as possible but also simplify it because we were in a situation where Saturday nights, we have to get 140 meals out ... in a certain period of time.... So, you've structured it as a package, weekends specifically... They all get the same price, they've all paid one price, and they all get exactly the same... And everyone's happy.

Participant 8 noted the importance of promotional pricing, stating:

Lots of people are obviously looking for economically friendly places to go out and dine at, or just to go out for drinks. So, where you have your two-for-one or half-price cocktails and drinks, two-for-one burgers and things like that.

For these participants, price dictates where their business fits into the market, or where price sensitivity on the part of consumers may dictate the need to transition. What is clear from both statements above is the fact that customers are price sensitive, and therefore businesses have to adjust their marketing to address these sensitivities.

This is supported by the response of Participant 6:

We're adding in sort of more drinks specials, where previously it was more about what you get and the place and the experience. Now, it's a buy a tequila and get one free, added in. Because people are a bit more pressurised ... Because the wallet is a little bit pressured, you know.

It is evident from the above responses from Participants 4, 6 and 8 that their customers were price sensitive and the main objective was to retain customers, drive income and attract new customers. Pricing is key when wanting to retain a certain profile of customer or attracting new customers. If pricing is too low, one could attract the wrong customer, whereas if it is too high, a business could be turning away potential customers without knowing it. Businesses should be aware customers are generally price sensitive, whether they are locals or visitors (CCT, 2013:170). This approach would support the City of Cape Town's strategy in recognising the economic value of tourism in its study completed in 2015. A domestic tourism survey conducted cited unaffordability by 57% of its respondents (Department of Tourism, 2017b:36). It is important for business to note that one strategy doesn't suit all business types, and when researching, customers look at pricing, fairness and the ease of comparing products when shopping. The approach also says the business wants customers to return and the owner wants to sustain

business. The seasonal aspect of many tourism activities in destinations such as Cape Town requires many business operators to be highly sensitive to price. The seasons are driven by what is referred to as high season, the summer months (December – March), and low season, the winter months (June – August). As Cape Town is in the southern hemisphere, its location, exchange rate and weather are perfectly suited to travellers residing in the northern hemisphere. Participants 7 and 12, both from the hotel industry, specifically consider marketing activities such as reduced prices in winter or give returning customers a discount on the current rates to deal with seasonality as stated by Participant 7: “In winter we reduce our prices to loyal customers.” Also highlighting issues around seasonality and price sensitivity, Participant 9 noted:

Oh yes, we have four different rates per year.... And then also what happens is we do different rates for people who have been here before, several times ... So ... and we entice people back as much as possible.

Participants were of the opinion that corporate chains had moved into De Waterkant and had contributed to challenges in the pink niche, as these large chains have the resources to negotiate contracts and discounted deals with suppliers, resulting in the pink village transitioning to the mainstream market (Participants 3–4, 6, 8–10 & 12). Participant 11 was clear in stating: “You had a supplier and then you had a supplier that would supply to all small businesses.” The participant was implying the corporate supplier is cheaper compared with the small business supplier who charges higher prices. They can’t compete with corporates, as the cost of food produce is higher, including the daily operational costs of running a business.

Seasonal fluctuations are a general concern in the tourism sector but should be of greater concern for businesses who only operate within a limited niche such as pink tourism. Although LGBT tourists travel to destinations year-round (UNWTO, 2017b:12), in destinations such as Cape Town, the development and growth of the niche have occurred during the warm summer months when seasonal parties such as the MCQP, the annual Pride festival and beach-going have been the focus of many visitors (Rink, 2019). Seasonal events such as Pride and MCQP became a critical part of the development and growth of the pink tourism niche in Cape Town, and as a result, business put a great deal of effort into concurrent promotions. Such promotions revolve around the products and pricing offered in the niche. As tourism in Cape Town is seasonal, most businesses in the accommodation sector run promotions in the winter months to generate new business to carry them through the low season thereby ensuring local and international visitor

numbers increase (Law, 2002). “What’s very important is pricing,” and “I try not to discount,” were the interesting views expressed by Participant 1, while Participant 10, who is involved in the entertainment industry, added, “Ticket prices too, you know, we’ve sort of had one price increase in two and a half years. You know one has also to be careful.” This response is firm in that it is important to consider pricing to not overprice and drive yourself out of the market.

Consumer spending as a measure of private consumption in South Africa is estimated to be worth R1 862 million, with 0,7% of that figure coming from LGBT adults with an estimated buying power of R130 billion in South Africa (The Other Foundation, 2017:9). Correct pricing helps in building the brand for a business by perceived value for money and customers spreading the word. Participant 8 noted that they “have themed promotions and specials” to keep their regular customers coming back weekly. The themed specials were on meals, while promotions were done on Valentine’s Day or at back-to-school parties where suppliers would discount prices. Businesses would in return market products with the aim of increasing turnover. Likewise, to generate income and hype, Participants 4, 6, 7 and 8 would host themed events at bars during Pride, and Participants 2, 9 and 12 discounted room rates at the hotels and guest lodge. To celebrate the rights of LGBT persons in Cape Town, Pride month is held in February which falls in the middle of the summer. “So, with certain things that happen within the gay community, we obviously plan our events around that,” said Participant 8, indicating the opportunity to make money when pink events or special occasions take place. These events are used as an opportunity to generate quick additional income, but also reinforce the business’s positioning among the LGBTQ community as supporting pink initiatives. In the accommodation sector, returning guests who may have visited a specific pink event previously were identified at the booking stage by the booking system or when checking in. They were acknowledged through a discount offered. It is noteworthy that other events, for example, Valentine’s Day and Human Rights Day, which were not necessarily gay-specific, had been sponsored by businesses as an opportunity to increase their customer base. Participant 12 shared the same sentiment as Participant 4, who explained, “This was done as gay people were not supporting businesses throughout the week and even on gay-only nights, bars and restaurants were not full.” Participants 2 and 7 stated, “I would market the business in any sector,” thereby suggesting the targeted customers are beyond the pink niche. This comment is important to note as it speaks to the sustainability of a business. It could further suggest that although businesses originally opened

for the LGBT community, it was not the owner's intention to be exclusive but rather inclusive of the mainstream market.

Throughout the process of data collection, all the participants were of the view that their businesses were open to all and were not exclusively gay. This approach supports the view that business owners were in business for the long term and depended on local and international visitors for the sustainability of their business. Opening a business was about contributing to the economy, jobs and the various industry sectors. Thus, the products offered in the pink niche were key to sustaining the sector.

5.4.2.2 Product

In many ways, the products on offer to serve the pink niche are no different from the mainstream ones, except they are accessed in a gay-friendly establishment. The products on offer relate to the tourism sector, such as boutique hotels, guesthouses or self-catering accommodation with various amenities such as gyms, pools and spa treatments. For leisure activities, there are clubs, bars, restaurants and retail shops, all providing a specialised product geared towards the LGBT consumer, and drag shows, which originated specifically for a gay audience and their 'pink rands'. Since the 'pink rand' is a term denoting LGBT consumer spending, a sense of value is attached owing to the proportion of single professionals or couples without children, known as DINKS because of their disposable income (The Other Foundation, 2017:7; Disemelo, 2014:171). The LGBT consumer is known to enjoy a quality lifestyle by seeking access to luxury products and travel (Southall & Fallon, 2011:224). Opportunities for growth and sustainability via expansion into the mainstream market have induced pink businesses to reconsider their marketing efforts as Participant 6 said: "The pink market is not sustainable, there aren't enough people to sustain the market." The same sentiments were shared by Participants 3, 4, 8, 10 and twelve, that products serving the niche need to be expanded beyond their current market in order for a business to sustain itself. As most pink publications promoting the products and services in the niche are no longer printed in Cape Town, pink businesses have shifted focus to the mainstream market, suggesting that society's views have changed, and businesses had to move business opportunities beyond the pink niche. Society has become more inclusive, hence there is no need for exclusive services as the LGBT community is seen as part of the mainstream.

Participants had different views relating to the role of marketing and marketing activities. While some participants have successfully transitioned into the mainstream, others struggle to evolve into a broader market because they are not able to adapt the marketing mix for their businesses to suit the changing social and market forces that shape the pink tourism sector.

5.4.2.3 Place

In the context of the marketing mix, 'place' refers to access and distribution channels conceptualised by McCarthy (1964). For the pink niche, the access and distribution aspects of 'place' are also related to geographical location, such as the enclave of De Waterkant. Yet, place is more than a geographical location in that it changes over time through activities and social behaviour, thereby defining its meaning. Tourism industries are suggested to be defined by promotion and supporting the local economy through trade and sourcing from local suppliers in the sector (Department of Tourism, 2017a:11). Places are marketed to tourists and locals through different activities to attract them to travel activities positioned for their enjoyment. Cape Town Tourism markets its products and services on the Internet through its website and social media. Although Cape Town is marketed as an inclusive city, participants were of the view that not sufficient pink marketing was done in support of their businesses. In the pink tourism niche in Cape Town, the 'place' – where the product will be offered – has traditionally focused on De Waterkant or the 'gay village' (Visser, 2002:89). The place/gay village was forged by businesses who undertook their own marketing activities and the LGBT community that frequented the area and businesses (Elder, 2004:580; Rink, 2008a:216). This place offered LGBT locals and tourists a space where they could stay or participate in leisure activities. The enclave allowed freedom of expression and a sense of security, as De Waterkant comprised a cluster of gay businesses catering for the niche. As Participant 1 stated, "There's the people of Cape Town who became more acceptable of gay marriages and gay relationships, and gay everything." The area thrived over the years, serving the LGBT market; however, businesses in the area operated in isolation, according to Participant 2:

We tried initially to get the people together as the gay or as the pink market, to bring people together and to sort of... pool our resources and be able to advertise. But ... everybody was going [after] their own piece of the pie and everybody was fighting.

The above implies everyone put their own business interests first, with the result that businesses in De Waterkant were not collaborating or aligned to sustain the niche. The 'place' of De Waterkant as a significant geographical space and distribution channel for the pink niche became further fragmented owing to the lack of a common objective among pink niche businesses. In addition to this, the place of the pink niche tourism market was disrupted by society, as Participant 8 explained: "I definitely think that there have been changes. I think that society as a whole is more accepting of the gay community if you compare it to maybe ten or five years ago." The fragmented niche and societal change allowed developers to realise new opportunities in De Waterkant owing to its central location in an established area. The opportunity was further supported by businesses relocating because of higher rents as highlighted by Participant 3: "It was getting to a point where just subconsciously the LGBT community would already consider Green Point being a high-end, high-price area." With the redevelopment in De Waterkant, change occurred through the village's new inhabitants, buildings and tenants. A process of 'de-gaying' started, and thus the place for the pink niche market – and the market itself – began to extend far beyond the confines of a few square city blocks in Green Point. This viewpoint is underscored by Visser (2014) and Rink (2016), who noted the 'de-gaying' of De Waterkant.

The development of new residential and retail spaces in the De Waterkant area has pushed pink businesses out of the area, resulting in businesses closing or moving into different areas. Participant 4 said: "Businesses took up 80% of the occupancy, while residential occupancy dropped to 20% in the pink village." This change possibly suggests with new businesses occupying most of the buildings, the village is quiet in the evenings with employees returning home, and as there are fewer residents, the market for remaining businesses is smaller. Adding to the challenges are the holiday lets which are short term, thus leaving the pink village deserted in the winter season (Visser, 2014:473). Participant 11 noted that, "The new developments have retail spaces which are occupied by corporate chain businesses, resulting in landlords charging higher rents." This meant new competition was in the area with big corporate backing and volume to charge lower prices for similar products being sold by pink SMMEs. Participants 4, 6 and 11 felt that small business owners who had operated in the pink village found they were unable to compete in the face of higher rents charged by the new landlords, while big corporate chain businesses could. Should this trend continue, the result will be that more pink, small businesses could close their doors or move to other premises in other parts of the city where the rent for commercial space is more affordable.

5.4.2.4 Promotion

Promotion is an important element in the marketing mix, regardless of the business sector. Promotion does not exist on its own in marketing but serves to connect elements of marketing to allow the traveller an experience that fulfils an expectation or wish (Meethan, 2006:7). Promotion of niches not only complements the traveller's experiences, but also builds on the whole tourism sector, such as a business traveller who is an avid golf player pursuing that hobby further owing to promotion by the travel agent or hotel. For some participants, promotion simply meant carrying business cards and handing them to potential clients (Participants 4, 6, 10 & 12). Participants 6, 8 and 12 who are involved in the amenities sub-sector, considered training staff, themed evenings, and running specials as promotional activities. For others (Participants 3, 4, 8–10 & 12), it was being dependent on their business's website, building relationships, branding cars and supporting sponsored events at their business or sponsoring events outside their business. In light of this, Participant 10 commented: "Through a client who attended my show, our business was sponsored with branded vehicles." Through the sponsorship of a client, this allowed them to market their business not only in gay publications but also in mainstream ones, thereby contributing to thrusting the niche into the mainstream.

Innovative strategies for promotion have served to push pink niche businesses further into the mainstream. Billboards located around Cape Town, SMSs and a database also became marketing tools used to promote the business for Participant 10, an extraordinary approach for a pink business in Cape Town. Participant 10 explained that the billboards were located along the N1 and N2, the two main national roads leading into the city centre of Cape Town, for optimum exposure. While billboards may be a typical and effective marketing activity in the mainstream (Taylor et al., 2006:32), their use by Participant 10, owner of a formerly pink niche business, has extended the marketing message and created wider visibility for that business beyond the gay enclave of De Waterkant. Participant 10 also shared the following insights related to promotion:

We've got a newsletter, so obviously we collect data every night of people who come [to the establishment]. That's all captured, so we've got a dedicated database. So my newsletter is going out to people who have been [to the establishment]. You know, we also don't bombard them ... but we've also got an SMS line. So if there happens to be a special or the opening of a new show, people readily know about the info. Like I said, we've been very lucky: a few billboards, editorials in magazines.

It may be deduced from the insights shared that this pink business is engaged in various marketing approaches to market its service. The marketing approach suggests the owner understands the importance of marketing in reaching audiences through various marketing platforms.

Marketing practices have shifted from traditional marketing activities to predominantly above the line advertising on social media platforms. The Fourth Industrial Revolution relates to customers' experiences and perceptions of value being perceived by digital capabilities. Of the four main effects, two of them are customer expectations and product enhancements expected from business (Schwab, 2016). The majority of participants did not make use of a marketing company to run marketing campaigns and preferred to handle their own marketing efforts as suggested by Participants 1–4, 6–7 and 10–12. The feeling that marketing agencies are “too expensive” was expressed by Participants 3, 4, 11 and 12. In spite of not benefiting from the services of specialised marketing agencies, the lack of an intermediary allowed participants to do a promotion without consulting externally, and thus without delay, especially when business was slow. Participants 1, 3, 7, 8 and 10 either said they did not budget or could not afford to use external marketing services, and if advertising was done, it was mostly in gay-focused publications like *The Pink Tongue* or *Gay Guide*. This suggests that businesses consider gay publications convenient and effective for promotion because they know their target market will be reached. With established relationships between pink businesses and pink publications having been formed through regular advertising, it is possible that reduced advertising rates can be negotiated, creating better return on marketing investment for participants. Furthermore, it is possible that mainstream publications don't provide an adequate platform for gay businesses to advertise in specifically, or it's not the accepted norm for pink businesses to advertise in local newspapers.

In terms of digital marketing, most participants used social media platforms like Facebook and Instagram, business-focused search engines such as Google My Business, and/or travel review/booking sites such as Tripadvisor or Booking.com, as these platforms are free. Participants 3 and 4, who use Instagram, manage their accounts themselves, with Participant 3 elaborating on the frequency of Instagram marketing posts by stating: “I upload photos at least every second day.” Participants 7, 9 and 12 rely on the loyalty of customers and “word of mouth” to market their businesses through experiences they had at the establishment. “Not Twitter” was the firm response from Participants 3, 11 and 12, as they found the platform too time consuming to manage on a daily basis, and less effective as a leisure tourism marketing platform. Facebook

and Instagram were viewed as less time consuming and easy to manage, as reiterated by Participant 3: “I have all the contacts on my phone and Facebook, so I just post when the club is hosting drag competitions or running drinks specials.” Social media platforms allow the participants to market their services to a global digital audience and allow the businesses to be in control of the content posted online. At the same time, such platforms are not exclusive to the pink niche, thus they allow for growth into new markets, and create opportunities for exposure beyond limited channels of distribution.

Companies who post their own content on Facebook, Instagram, Google My Business, Booking.com and Tripadvisor to market their businesses have complete control as they manage the messaging. Participants 3, 4 and 8 have developed their own profiles on Facebook or Instagram, where they upload and update content when necessary, as when they are running specials. This was found to be convenient, inexpensive and cost effective, as almost everyone owns a cellular phone and is on some form of social media. Participant 4 commented: “The flexibility of social and online media allows me to post specials and parties anytime during the day” especially on business websites, Instagram and Facebook. Owing to the popularity of Facebook and Instagram, the market reach for businesses is unimaginable in comparison with the traditional route of marketing (Participant 4). Despite the marketing efforts of businesses in the pink niche, the promotion of, and subsequent launch of the business into the mainstream, can sometimes be accidental. Such was the case with a pink restaurant deeply embedded in the pink niche when it opened in 1994 (Rink, 2008b:134). Participant 1 shared that the first gay restaurant in De Waterkant received a positive review in a local, mainstream newspaper for outstanding food and service after, unbeknown to the owner, a diner visiting the establishment was indeed a reporter from the newspaper. As the number of customers increased, Participant 1 viewed this as a public relations marketing activity due to a positive review. In spite of the restaurant owner’s intention to focus on the pink niche, the business was accidentally thrust into the mainstream because of a positive review in a mainstream newspaper.

Knowledge of consumption, experiences and buying patterns of customers will benefit any business owner in understanding the purpose and power of marketing in any business (Obermiller et al., 2008:21). The importance of knowing and understanding your business leads to relationship building with customers and suppliers and knowing who your competitors are, which supports the objective of sustaining a business. “We would recommend restaurants in the De Waterkant”, Participant 11 in the restaurant and bar sector noted. He would recommend other LGBT

establishments to visit or dine at if asked by his guests. When visitors ask for recommendations on things to do, Participant 9 noted that “you give them the information and what they do with the information is up to them”. The rest of the participants relied on word and mouth for feedback or heard directly from customers about their experience at the bar or restaurant.

As few LGBT events are held throughout the year. Participant 8 said, “So with certain things that happen within the gay community, we obviously plan our events around that.” It may be inferred that planning is executed because anticipated revenue would increase because of a larger event. Other participants explained that they depended largely on marketing their business through gay events such as the annual Out in Africa gay & lesbian film festival, the MCQP, and Pride events (Participants 1, 3, 4, 6–7, 11 & 12). In order to survive within the niche and to expand into new markets, businesses in the pink tourism niche need to get their message out, often on limited promotional budgets. Participants 1, 2, 4, 8 and 12 said they made use of opportunities for “free advertising”, because as small businesses they do not have the budgets to pay for marketing. Participant 11 questioned why LGBT events are never advertised in local and community newspapers, reiterating the suggestion that pink businesses need the support of Cape Town Tourism in creating networking opportunities among pink businesses and mainstream establishments. Few participants made use of gay print media like the Cape Town Tourism guide, *The Pink Tongue* and the *Gay Times*, as they found them “too expensive”. The comment suggests that the number of visitors seeking a pink tourism experience is limited in choice of activities and is not a true reflection of the LGBT market. *The Pink Tongue* has gone digital since 2018, and therefore is only accessible through a website. A few participants did advertise in the above media initially, but could not gauge return on money spent. Participants 2, 4 and 12, three different businesses, a boutique hotel, bar, and theatre restaurant, all advertised in pink publications to the pink niche when they opened. The owners found only certain nights of the week were busy, and enquiries were made because of good reviews on Tripadvisor. After explaining to interested customers it was a pink establishment, they indicated they didn’t mind. Bookings were taken, and people just kept returning to come to eat or stay at the hotel. Through word of mouth, customers and clients would hear about the venues and return. These establishments are still open for business and are no longer exclusively gay.

It is essential for tourism businesses to monitor the effectiveness of the marketing-mix elements. Given the role that the marketing mix plays among the businesses sampled for this study, the monitoring of marketing activities has allowed three participants to compensate for disruptions in

that they could adapt their business model towards sustainability of their business. This is in line with the findings of González Tirados, (2011:1596). The importance of monitoring campaigns is to ensure businesses achieve their desired outcomes and could reveal whether a business should shift its marketing activities (Department of Tourism, 2017a:20). Participant 11, who operates in the hospitality sector, monitors traveller reviews on their website “through comments and feedback posted on Tripadvisor or Booking.com”. This method of monitoring allows owners to track what guests are saying about their establishment relating to service, comfort, value for money and overall experience. Guests visiting were asked by Participants 7 and 12 how they heard about the establishment, and most would respond, through “Tripadvisor” or “word of mouth”. This sentiment is echoed by Participant 8, stating, “...then obviously the biggest one ... is word of mouth”. This response highlights the importance of guest satisfaction: guests do value a good experience and they are happy to share that with friends, family and other audiences through favourable word of mouth. To enhance the guest’s experience in the hospitality sector, staff were trained and informed on how to deal with guests and encouraged to communicate with guests, and feedback would be given in staff meetings. The business would address any issues in the establishment based on staff feedback.

In this theme, the data revealed that business owners have a different understanding of the elements of the marketing mix and the role that each element plays within the niche and/or their transition to the mainstream tourism sector. Participants 4, 6 and 12 monitored their marketing activities and determined the return on investment for budgets spent on marketing promotions. Participants 3, 4, 7, 8 and 11 mentioned two-for-one specials or winter specials, which are below-the-line marketing activities, while Participants 4, 10 and 12 talked about above-the-line marketing like posters and billboards. Marketing budgets are not a priority for businesses, and some respondents see the business website as an adequate marketing medium. This is in line with the view of the participant who noted that in the digital age, consumers want to learn about services and products online rather than via traditional marketing methods (UNWTO, 2017b:67). For this study, it means businesses are dependent on annual events like Pride and gay festivals to market their businesses, suggesting that business peaks during these events. For the rest of the year, businesses would be dependent on the pink market to generate income. This could also suggest they would have to target the mainstream market. Many of them don’t use marketing agencies; however, they are knowledgeable about social apps and prefer these as marketing tools. This could mean that pink businesses missed out in networking opportunities within the pink niche and

limited business opportunities by not being exposed to the benefits of marketing. As Participants 1, 4 and 7 noted: “Marketing agencies are expensive.” One could argue the traditional marketing approach and methods have not adapted or responded to business needs in the current digital environment. The demise of pink-focused media and the uptake of social media platforms have acted together to influence pink businesses in how they market and to whom they market. This could be an indication that small businesses could benefit from upskilling in understanding the principles and importance of marketing a business through interventions by government or small business organisations in order to ensure the sustainability of small businesses and grow the economy in order to sustain jobs. The varying degrees of engagement with market changes with regard to product, price, place, and promotion appear to be key factors in pink niche tourism businesses’ successful transition to the mainstream.

5.4.3 Theme 2: Diminishing support from tourism bodies

Official tourism bodies play an important role in assisting small businesses by providing insight into how the various tourism sectors operate and by offering support (South African Tourism, 2017b:9). Likewise, LGBT organisations and supporting services add structure, networking opportunities and relevance to the pink niche. These organisations assist in regulating the industry and how it operates within its mandate (South African Tourism, 2017b:42). When the pink tourism niche was operating at its peak in Cape Town, from the late 1990s to 2007 (Rink, 2016:28), businesses operating within the niche would pay to advertise in specialist publications endorsed by gay organisations in an effort to reach their readership target market (Rink, 2008b:85). In the past, Cape Town Tourism supported the pink niche and highlighted the city’s pink tourism products and services in their formal brochure in a dedicated section titled ‘Pink Cape Town’. This created a valuable and helpful platform to promote small businesses operating within the niche. Since 2019, however, the Cape Town Tourism visitor guide, and their 2020 website no longer include a dedicated page or section referring to the pink tourism niche, but only a statement celebrating international Pride month. As noted on the official website under the ‘arts and culture’ banner”:

Cape Town is a cosmopolitan city with residents from all around the world, so during this International Pride Month, we would like to share our support for our LGBTQT+ community and our commitment to continue making Cape Town an inclusive space for both locals and visitors to enjoy (Cape Town Tourism, 2020).

The statement above suggests that the tourism body recognises LGBT travellers but does so in the context of mainstream tourism, promoting Cape Town as an inclusive city. At the same time, it demonstrates that Cape Town Tourism no longer recognises the pink market as a niche in their marketing initiatives, but rather views it as part of the mainstream tourism sector at large. With credible tourism bodies such as Cape Town Tourism assimilating pink tourism products and services as part of the mainstream, businesses within the niche find it challenging to get the government support they need. Similarly, participants did not find it beneficial to be a member of Cape Town Tourism any longer, because of the high membership rates with minimal benefits, for example, inadequate advertising value (Participants 2–4, 7, 8 and 11) with Participant 12 stating of membership, “It’s too expensive and not beneficial.” Participant 11 questioned why an annual membership fee for a tourism body should be paid by small businesses, when in fact these businesses are supporting the local economy and creating jobs. Participant 1 supported the view that membership fees were not affordable for a small business and shared the following sentiment:

And so because we knock our prices down we can't afford [it] ... I mean, to go onto these tourism boards and all that, it's like two, three, four, five grand a year! By the time you're finished, you know, to get a listing on Pink Tongue [you] pay again. Do a listing there, pay!

Participant 4, affiliated with the amenities sector, participated in a combined promotional initiative with Cape Town Tourism where vouchers were handed out to tourists at the arrivals hall at Cape Town International Airport and found that not one tourist redeemed the voucher. Participants 3, 6, 8 and 11 expressed their frustration with Cape Town Tourism, with Participant 11 expressing these sentiments: “We are frustrated in that the pink niche would only be remembered when it is beneficial for City of Cape Town or Western Cape Government,” referring to the month of Pride or when other LGBT events were held.

Participant 2 found no support from government or any tourism regulatory organisation when trying to form a support body for pink tourism businesses and made it clear that, “Cape Town Tourism and South African Tourism were not affected at all by what we were trying to do” in forming a dedicated, official pink tourism body. Participant 2 further elaborated that this was a missed opportunity in networking and supporting the pink niche by Cape Town Tourism and City of Cape Town. The support leveraged from such official pink networks could have led to more collaboration among pink businesses, and greater acceptance by and integration into

communities for a sustainable niche. As a result, after being a member for close on four years, Participant 2 explained that their company decided to revoke their membership of Cape Town Tourism: “We actually wrote to them and said, you know, you’re of no value to us, you don’t support us in any way.” From Participant 2’s perspective, “Cape Town Tourism was not interested in smaller boutique type hotels ... I think they were poorly managed, and I think they did the city a disservice” by not supporting the formation of a pink tourism body. While Participants 9 and 12 agreed with the sentiments that Cape Town Tourism had let pink businesses down in that they had failed to support businesses through networking opportunities and funding, Participant 11 also noted that “more support from City of Cape Town and Western Cape Government” was required for pink businesses to flourish as a niche. Some owners felt that Cape Town Tourism had let businesses down in showing little support towards the niche. From the participants’ comments above, it is clear that the niche was not supported, recognised or acknowledged within the tourism sector.

A suggestion offered by Participant 6 was to bring all the support structures together to drive and support the niche as they serve the greater tourism industry just like the medium and larger businesses. To finance the support structure or body, a levy could be paid by businesses that wish to benefit from the services. Participants furthermore indicated that they would still like to receive support from municipal and regional tourism bodies through the City of Cape Town and the Western Cape Government to ensure the sustainable growth of pink businesses. Participant 2 stated:

I think there is definitely, and I think it should be a requirement. And I think, what Franschhoek has done in terms of [a] tourism levy is very clever. And it should be, I think it should be mandatory.

Collectively, the participants suggested that as pink businesses, they would like support from government and tourism bodies in terms of marketing opportunities, funding and access to a larger supplier base offering competitive prices and enjoy the same level of recognition as large mainstream corporate companies in the tourism sector. Non-governmental organisations (NGOs) provide a service in areas where government has not made provision, whether because of fiscal budgets or little to no infrastructure. In South Africa, NGOs are dependent on international funding for societal issues like poverty, education and health services to the general population or specific sectors like the LGBT community.

Participants who operated in the accommodation sub-sector found it beneficial to be a member of the Tourism Grading Council as this was viewed as a trustworthy certification by local and international guests. Participant 9 said, "It complied with international hotel grading standards whereby the level of comfort and service would be on par with the international accommodation sector, giving guests peace of mind." The participant further contended, "If you took away the five stars at the door ... The clientele will drop to literally to 10, 15%." This could support the importance of a business being a member of a regulatory organisation in its sector, thereby building on a trust relationship.

The Department of Tourism recognised the sharing and growth of the economy to be important to the tourism sector through sustainable growth and competitiveness (Department of Tourism, 2017a:2). The mandated tourism body in Cape Town, Cape Town Tourism, has an important role to play in supporting local businesses in the tourism sector (Cape Town Tourism, 2016:12). Participants mutually reiterated the shared concern that they would like to be recognised and supported by local government and tourism authorities as contributors to the economy and job creators. With LGBT businesses only recognised when larger events were in the spotlight, such as Cape Town Pride, there is a feeling among participants that Cape Town Tourism is abandoning the pink tourism niche. That being the case, participants need to rethink how they can continue to play a role in the tourism sector through transitioning to the mainstream.

5.4.4 Theme 3: Shifting media platforms

The findings of this theme revealed that media platforms used for marketing among participants have evolved from traditional print media to a more recent shift towards social media. The different media platforms used by sampled pink businesses range from print newsletters and brochures to social media platforms such as Facebook, WhatsApp, Twitter, Instagram and SMS. Foremost among the changes are the development and growth of social media platforms, which have become vital and have changed the way in which marketing communication is managed by participants. This is evident in the explanation of Participant 3: "I use very much social media [*sic*], like intense social media." Social media is the collective term for different forms of online communication used by individuals for sharing information, ideas and/or content, whether for personal or business use (Hudson, 2020). As a society, people connect daily on different social media platforms, whether to catch up with family, read news, socialise, shop, conduct business

or search for general information (Donovan, 2019). Participants referred to Facebook, Google, Booking.com, WhatsApp and Tripadvisor as a few of the most popular and recognisable social media platforms. Participants 3, 4, 6, 8, 10–12 said the preferred platforms were Facebook, Google and Instagram, with Twitter being the least favourite. Twitter was said to be time consuming in managing and responding to posts and comments. Seven of the twelve participants who contributed to the study indicated Instagram and Facebook accounts were easier to manage. Participants 2, 7 and 12 have Facebook and Instagram accounts, but don't update the site regularly because of time constraints. They also subscribe to free social media platforms like Tripadvisor and Booking.com. Social media platforms are important marketing tools used to communicate business services to prospective customers. The benefits of social media platforms include their low cost and ease of use. This allows business owners to control costs and content. They can post promotions or specials when convenient for the business cycle and to coincide with individual marketing activities. The convenience of social media platforms is matched by their ability to reach current and potential customers at a lower cost compared with traditional marketing campaigns.

Previously the LGBT print media available to the public included the Pink Map, *The Pink Guide*, *The Pink Tongue*, and *Exit* newspaper. Since the publication of Cape Town's Pink Map, the first dedicated guide to pink business and services in Cape Town published in 1999 (Rink, 2008b:197), media platforms are changing every life. The loss of *The Pink Guide* as a marketing option impacted on pink businesses as highlighted by Participant 2:

The Pink Guide was the only marketing tool used and it worked for our business. We advertised in the guide for 10 years and were loyal to them as we felt we had to support the community and it was a huge income generator.

Pink businesses are limited in advertising as mainstream media publications do not advertise gay events like Pride festivals. *The Pink Tongue*, a subsidiary newspaper of Media 24, was distributed gratis; however, businesses had to pay to advertise in the publication. It went digital at the beginning of 2019, thereby reducing the amount of LGBT print material available to the niche. The demise of print media and the advent of social media platforms have together pushed pink businesses out of the niche and into the mainstream. As print media is time consuming and expensive for small businesses, it is not the preferred medium for marketing. Participant perspectives suggest that their transition to the mainstream market has been induced by both

push and pull factors. On the one hand, the demise of the print media has forced pink businesses to seek alternative platforms for marketing. This view was supported by Participants 3, 4, 6, 8 and 10. Participant 2 noted the changes in print media as it became less popular owing to social media and said: “As soon as print [was] not the main source of information, once Tripadvisor kicked in ..., people didn't look at guidebooks anymore, they just went to Tripadvisor.” At the same time, the advent of social media platforms has allowed these same businesses to reach consumers beyond their traditional audiences. Together these forces have shifted pink businesses out of the niche and pulled them into the mainstream.

When asked how guests found out about their exclusively gay establishment, Participants 2, 9 and 12 expressed the interesting fact that most guests found the business on Tripadvisor, in spite of their marketing efforts to focus exclusively on the pink niche. At a time when the marketing effort was directed at the LGBT community, mainstream tourists were attracted to the establishment for reasons other than its gay exclusiveness. Participant 2 noted:

If we asked anybody how they got to us they said, we read the reviews on Tripadvisor. Yeah, we used to run stats all the time and eventually we stopped because it was sort of always 70% plus, people coming through Tripadvisor. We found you on Tripadvisor, that's why we are here. So, it was always the same sort of thing, it was at least 70% and the other 30% was ... the other 25% was tour operators that had been to us before. And so, they would drive business for us and then 5% of people that would pick up a guidebook.

When probed about the preference of marketing tools, Participant 1 said, “I use whatever is free”, while Participants 3 and 12 agreed with the statement. The implication of the previous statement is pink businesses are inadvertently situated in the mainstream by default because their message now reaches audiences beyond a specified niche. This could be considered one of the factors of how the Internet and social media have shifted the niche to the mainstream. Demonstrating a shared sentiment among many of the participants, Participants 3 and 11 noted that businesses within the niche and more broadly in the tourism sector said, “Print media is too expensive and difficult to monitor.” Participant 4 commented, “Publishers were slow to respond to business requests and were not responsive to the pink market.” The comments indicate that efficiency and time are important to business owners when operating a business dependent on seasonal visitors. As traditional marketing approaches are time consuming in scheduling appointments, the Internet has allowed for businesses to create websites and interact with customers within a short space

of time as suggested by Participants 3, 4, 11 and 12. The time- and cost-saving aspects of social media as a marketing tool are reflected in a comment from Participant 3: "All that is needed is a cellular phone and you can create an account in less than five minutes, being efficient in the amount of time saved." The response is evidence that the shift from traditional marketing platforms such as print to online platforms has become the preferred medium for researching holiday destinations, as well as the transition from print to social media, as quoted verbatim by Participant 2 above. The result is to expose this participant's business to a broader market, beyond those consumers who might pick up a gay-focused tourism brochure. The shift in media platform may be somewhat unexpected as above or may in some cases be due to cost.

"Our business website is used for marketing," said Participant 4, while Participants 3, 6, 8 and 12 shared the same view by relying on their website. Website management was not a key focus for any of the participants other than using the Internet to create a website and as a business tool. Participants 4 and 12 actively used their website through monitoring activity and building relations with customers. Participant 12, who operates in the accommodation sector, responded: "We use Tripadvisor as it's the biggest marketing platform and every guest who visits uses the Tripadvisor platform," while Participant 2 supported the statement by saying its guests booked online through Tripadvisor. The change in the market was brought about by guests reading positive reviews online, suggesting the transition to the mainstream was unintentional through social change and acceptance of LGBT people. The comment by Participant 2 who started a pink business in 2006, indicates how a business transitioned to the mainstream by serving the needs of guests:

Through reading reviews on Tripadvisor, we got the biggest upheaval from straight guests as the guesthouse was a gay establishment and they wanted to come and stay. The niche went right out the door as more straight customers requested to stay at the guesthouse in spite of the fact that he told them it was an exclusively gay establishment.

Participants 2,4 and 12 found Tripadvisor to be the preferred marketing tool for their business by encouraging guests to post on the website after departure. Booking enquiries were made irrespective of the venue's being a gay business was the view of Participant 4, who hosted hen parties regularly. Because of the popularity of Tripadvisor, used by most travellers, this could suggest the business unknowingly marketed its business outside the pink niche. Facebook and Instagram appeared to be the preferred platforms, with Twitter being the least popular platform.

As the world goes digital, and from the participants' comments, it could be assumed that social media is the preferred platform for marketing activities.

Participants viewed marketing tools as different activities: "We drive two branded cars and I carry my business cards" was the statement from Participant 10, who was sponsored marketing collateral in the form of branded cars and printed pamphlets. The marketing support was provided by a satisfied customer who had seen a show and elected to show further support by offering marketing and financial support to the business. This could also suggest businesses don't budget for marketing material. Participants 4, 8, 11 and 12 said they relied on word of mouth through guests or diners that had visited their establishment. Carrying and having business cards readily available was also a way of advertising their businesses.

Other social media platforms on which LGBT people meet are dating apps like MambaOnline, Tinder, and Grindr. Respondent 11 said, "What really changed is the switch from barfly to electronic trade." It's well acknowledged that today people spend most of their time online, connecting with others, shopping and emailing. The response of Participant 1 is a relevant statement, "It's just a whole switch over to logging in to Grindr or Tinder or whatever gay app you've got available." This is how people connect and meet today, outside the confines of a bar, club or coffee shop. People interact with these apps when convenient throughout the day, whether they are seeking someone to talk to online or possibly pursue a relationship. Not only is digital marketing easy to use and inexpensive, it connects customers and businesses (UNWTO, 2017b:32). This also suggests the important role social media can play in marketing a business. From the participants' viewpoints, it can be deduced that businesses found social media platforms responsive to business needs in that they are convenient, with content that is easy to manage. Research undertaken by the UNWTO suggests that LGBT travellers prefer to research, book travel arrangements online suggesting the shift from traditional to online booking platforms (UNWTO, 2017b:73). Owing to the low operating costs of social media, participants found it the preferred marketing tool for their business. Participants indicated the Internet and various platforms to be accessible at any time of the day and seven days a week, allowing them to time and control their marketing activities. The timing of promotions is controlled by the owner, allowing promotions to happen when business is slow, or agreements are reached with suppliers.

The Other Foundation formed a business support network in April 2016 for LGBT businesses to support them in various business activities like marketing, networking with various business

suppliers, mentorships and lobbying in the different government entities like Cape Town Tourism, the Western Cape Government and Department of Tourism (The Other Foundation, 2016:2). There were no gay-specific business directories which could support previous comments on the lack of support for businesses. At the time of this research, the one business LGBT support network is Village Drinks Cape Town, Instagram handle @Villagedrinksct. They host monthly events at LGBT and mainstream venues where a fee is charged and welcome drinks served (*Cape Town Magazine*, 2014a). The network was previously known as 'Conversations: Gay Business Networking Event Series in Cape Town'. Business and social networking are encouraged through games and spot prizes awarded for participation. Rather than being insular, networking events are for the LGBT community; the network's focus is to grow businesses beyond the pink niche. The networking events are hosted beyond LGBT businesses and are inclusive of mainstream businesses.

5.4.4 Theme 4: Challenges in the niche

Nine challenges emerged from the data analysis. These include: market size; social media; price; budget; crime; finance; new entrants into the sector; demise of anchor events; and societal change. These challenges together impact on the short- and long-term operations and sustainability of the pink tourism niche and those businesses within it. Each of these is unpacked below, in order to demonstrate the cumulative impacts on pink tourism businesses and their market transitions.

The first challenge that emerged from the analysis was the niche market size and how the uncertainty impacted the niche. The growth of the pink niche was fuelled by international tourists as the niche pursued the pink dollar, pound and euro (Visser, 2003b:170; Rink, 2013:66). In the case of Cape Town, a city with fewer inhabitants compared with larger global cities, the sustainability of the market can be challenging. Some businesses in the niche bemoan the fact, as one participant put it, that "the market is small in Cape Town, we can't sustain the pink sector" (Participant 4), while Participant 10, given his years' experience in the industry said, "You know, you have to kind of be ... and especially in Cape Town because it's ... yes, it's a great city, but it also can be a very small city in terms of what you're trying to achieve." This statement gives an indication of the limitations of the market size in Cape Town. Participant 8 commented, "Businesses won't survive if marketed to gay people only" because it is not big enough to sustain

a profitable business. Participants 2, 4, 6, 10–12 supported the viewpoint the niche won't survive owing to the size of the pink community in Cape Town. This suggests in sustaining a business, you need to market beyond the niche. When conducting the research fieldwork for this study in April 2019, De Waterkant Pink Village consisted of six pink niche establishments: two bars, two restaurants, a steam bath, and a café. De Waterkant is currently a combination of mixed residential and commercial space centrally located in the city. Participants 4 and 8 supported the viewpoint of Participant 11 who said: "The venue of choice might be in the neighbourhood due to convenience or a particular venue of interest due to preference." In the late 1980s and 1990s the area became a residential area for predominantly gays, with bars, restaurants, night clubs, steam baths, holiday rentals and guest houses (Hattingh, 2019:136). The village catered to the needs of the local and international pink market. The development of De Waterkant evolved the area, its residents and visitors from a gay village to the de-gaying of the village by heterosexuals frequenting the area and buying residential properties (Visser, 2014:475). The opening of the first Cape Quarter Lifestyle centre, a mainstream commercial mall in 2001, was the beginning of change for the Pink Village (Rink, 2016:30). The redevelopment of De Waterkant had been brought about by residential developments in the area with new retail spaces provided with higher rentals. This was due to businesses that had closed or had moved, thereby reducing the size of the pink village. The sense of community felt by LGBT persons who frequented the village was also brought into question by how business and locals interacted. Reiterating the fact that the pink niche requires a strong pink business community to flourish, Participant 4 noted: "It takes the community to do it and ... we don't have a strong community, it's too divided, it's too ... let's say culturally, [in] diversity ... There is no strong gay community." "The pink market doesn't have the numbers to sustain itself," said Participant 10.

Participant 4 said:

Clash of the minds ... Clash of everything that was it. It just became too much, and too political and people just ... you know, you had to run your own business and then that and then deal with all of that, and then everything else.

What had started as a thriving pink market has changed because of changes in the market and a diminishing market of customers. The niche has been redefined by LGBT businesses that operated independently and for self-gain. The redevelopment of the area forced local businesses and residents out of the area because of high rents.

The second challenge that changed the niche was the impact of social media. Social media has redefined how people engage in a brick and mortar environment and how they engage on social media. The accessibility of chat groups through the use of the Internet and mobile phones has changed how people meet and socialise. Social media has allowed the LGBT community to show allies support and being an influence on generational acceptance (UNWTO, 2017b:67). In most cases, customer experiences are shared on media platforms immediately, which could negatively or positively impact a business. Prior to social media, people would first decide on a place to meet. Because of accessibility through the Internet, people meet and engage differently in a manner that sometimes relationships or friendships are pursued first on social media (UNWTO, 2017b:66). Through dating sites, regarded as a safe medium, people chat and then decide whether they would like to meet (Motseole, 2019). This was supported by Participant 11: “Due to a high crime rate, people don’t feel safe, so social media also gives people a sense of comfort in getting to know the person they’re going to meet first.” The decision of a business to engage or not engage on social media could have unknown consequences if not managed, owing to lost marketing opportunities. As social media platforms are fast paced, responding to a customer’s experience or promoting specials is instantaneous. Budgeting for these marketing opportunities is inexpensive for the business, and requires minimal planning.

The third challenge for a business operating in a niche can be pricing. The reference to niche suggests that the business caters for a specific market which could result in high costs in comparison with mass marketing. The profit margins are considered to be higher when operating in a niche, as a specific market is catered to with unique preferences (Toften & Hammervoll, 2013:272). The result was local consumers priced out of the market, as Participant 6 argued: “When business was thriving, smaller businesses increased their prices, making things expensive for locals; businesses became greedy by constantly increasing prices.” This resulted in the niche becoming smaller as the LGBT community started going to mainstream businesses. Besides higher prices and businesses operating in silos, these are contributing factors to the fragmentation of the niche. As Participant 6 has extensive experience (+-18 years) in the gay community, serving on various boards, and is a business owner, this comment speaks to the demise of the niche. Owing to businesses charging higher prices, this possibly excluded a number of the locals who might have gone to alternative venues to socialise, thereby diminishing the niche. Participant 8 commented that, “Businesses won’t survive if marketed to gay people only” because the market is not big enough to sustain a profitable business. In the past some businesses made use of a

members only policy, thereby marginalising the gay community, which could be viewed as why the pink niche is fragmented: “I think the gay community is quite shattered, or you know, it's quite disjointed,” as stated by Participant 2. Participant 11 commented: “To compound matters there is no sense of a strong gay community due to diversity, culture and limited disposal income in the different professional sectors in the LGBT community.” Besides higher prices and businesses operating in silos, these are contributing factors to the fragmentation of the niche. The participant further suggested the ongoing segregation of social spaces is due to the past apartheid laws as previously disadvantaged communities still live in different parts of the Western Cape. In the past, businesses in the gay village would apply a ‘door policy’ to restrict minority group entrance to establishments. This narrative suggests the fragmentation within the niche, highlighting sustainability challenges for businesses. As Participant 9 suggested, you can’t be picky if you are in business as whoever walks into your establishment is a customer. Participants in the study had suggested that gay-owned businesses can’t only rely on the gay community.

The fourth challenge is a definitive budget process for the success of a business. The budgeting process allows owners to reduce costs, improve profits and focus on the cash flow. It further helps with the control and planning of finances (Cooper & Schindler, 2006:84). Suggested challenges were a lack of financial training or experience in completing a budget process. An unpredictable revenue income for business also makes it difficult to budget. To offset operational costs for repair work or services to the business, Participant 1 would pay by responding to the question, “Two burgers and two show tickets, with pleasure, or two burgers and two beers here, and I will do it with pleasure. I pay off like that.” To operate by paying for services through bartering suggests the business had cashflow challenges. This could possibly suggest keeping the business operating, the owner would do anything to keep its doors open to trade. Besides the daily operational requirements of running a business-like staff and customers coming through the door, the broader economic climate added to the challenges, such as the water shortages and electricity crisis. In 2018 the City of Cape Town declared a water shortage, with water restrictions implemented for all businesses and households in the Western Cape (CCT, 2017:72). These two key elements are considered the life blood of any business and impacted the daily operational requirements of businesses. Participants were further upset by the handling of the water and electricity crisis by local and national government. The unstable and unreliable energy supply led to load shedding occurring at different stages and different levels, impacting on all industry sectors and households (WESGRO, 2017:24). In spite of a load shedding timetable, the times were not

adhered to, further impacting on the daily operations of the tourism sector. These factors influenced businesses to consider their position in the niche, thereby transitioning into the mainstream to ensure sustainability.

The fifth challenge of crime and lack of unified support was highlighted as a weakness that needs to be addressed (CCT, 2013:173). The world-wide threat of crime was highlighted in the LGBT community in June 2016, with a hate-crime killing 49 people and injuring 53 others at a gay nightclub in Orlando, Florida, United States of America (UNWTO, 2017b:30). The management of crime in Cape Town also became a challenge with 8 285 people per 100 000 involved in crime with a large number of crimes being drug related (CCT, 2017:10). In South Africa, between 6.2% and 7.4% of its citizens felt they might consider violence against the LGBT community, highlighting the issue of crime being a problem for businesses in the pink sector (The Other Foundation, 2017:33). In spite of the City of Cape Town having the largest closed-circuit television (CCTV) network, crime continues to be a challenge impacting locals and tourists (CCT, 2017:101). Crime is addressed through partnerships with businesses and communities by neighbourhood watch groups, patrol officers on foot, and awareness campaigns (CCT, 2017:95). Tourism crime prevention and awareness are in part a mandate of Cape Town Tourism; however, this proves to be a continuous challenge due to poverty and high unemployment (CCT, 2017:8). Crime in Cape Town is a further challenge that Participants 4, 9, 11 and 12 said needs to be addressed as business owners feel passionate about sustaining their businesses in order to continue to trade. Because of crimes like robbing, mugging and car break-ins, businesses receive complaints from customers who don't feel safe when coming out. Private security companies have been hired; however, this meant additional expenses for businesses. Participants responded that businesses in the niche operated independently, which contributed to further fragmentation of the niche. Owing to increased competition and dwindling support from tourism bodies, small business owners were left to fight for an increasingly smaller market share on their own. This led to a lack of cohesiveness in the niche and an increasing move to the mainstream. Participants, as small businesses owners, did not feel recognised as vital role players by official tourism bodies, despite contributing to the local economy and job market as entrepreneurs. In competing for market share with large companies and corporates supported with large budgets, local business support continues to be a difficulty to ensure businesses sustain themselves. In the planning phase of budgeting, costs for the financial year can be challenging in predicting crises like the shortage of

water and electricity experienced in the Western Cape. Planning for uncertainty and its impact on business is viewed an impossible task for any small, medium or even corporate business.

The sixth challenge that entered the hospitality sector worldwide in August 2008 was the launch of Airbnb. Airbnb is an American holiday online rental website, allowing travellers to bypass the conventional method of booking accommodation for short- or long-term stays. The online booking system gave the traveller flexibility of cost, location, and check-in times, while not owning any properties (Visser et al., 2017:152). Costs were determined by the size of accommodation chosen to suit the number of travellers, a great advantage for families. Since the launch of Airbnb in South Africa in 2009, the hospitality industry has changed the accommodation market. In South Africa, the 'traditional' hospitality sector operated through hotels, guest houses, lodges, and bed and breakfasts. As a new hospitality platform in the accommodation industry, the South African market changed owing to the flexibility, cheaper rates and options of different property types selected by travellers in line with their budget (Visser et al., 2017:155). Airbnb changed the hospitality sector. Traditionally, corporates and hotel chains that monopolised the market determined where travellers stayed, the type of services offered, controlled room rates, and offered different loyalty programmes with perks for customers. With Airbnb in the sector, Participant 12 said, "This has turned the hospitality industry on its head," forcing chains of hotels worldwide to re-evaluate how they interact in the market. With the industry having thought they had customers' loyalty through various loyalty programmes, strategies had to be reviewed to keep customers coming back. Participant 12 highlighted that with Airbnb also entering the accommodation sector, visitors have found this to be a more affordable and convenient option when making reservations to stay over at a destination. Participant 12 further acknowledged the competitive edge the sector brings to the niche in how it operates in the industry in being an online platform accessible at any time throughout the day. Complicating the seasonal calendar in the hospitality sector, Participants 6, 9, 11 and 12 confirmed the current oversupply of hotels and guesthouses for tourists visiting Cape Town. This increases competition in levels of service, products and pricing in the hospitality sector.

The seventh challenge was the demise of funding, while gay-specific events in Cape Town have decreased over time. This was highlighted as a concern by participants, as sponsored events were part of the LGBT calendar, attended by both locals and an international audience. The annual Out in Africa Film Festival ran for 24 years from 1994–2018, but faced the possibility of pulled funding in 2018. This event was sponsored by local and international organisations: The

Atlantic Philanthropies, the National Lottery Board, Avis, Nu Metro, the British Council, French Embassy, Canadian High Commission, US Embassy, and the Argentinian Embassy (Delpont, 2018). Other funded events are Mr Gay World, gay conferences, and Pride. There are fewer LGBT people attending gay-only events as in the case of the MCQP, resulting in fewer visitors in the season because of the de-gaying of De Waterkant, once known as the gay village (Visser, 2014:477).

The challenges of societal change and attitudes have forced businesses to address who their customers are and in which market they operate. Shifting demographic trends worldwide are shown to have an impact on tourism (Yeoman & Butterfield, 2011:8). Societal changes and shifts in attitudes towards LGBT individuals and communities in South Africa have been highlighted by The Other Foundation that in their 2016 study, 'Progressive Prudes', surveyed attitudes towards homosexuality and gender non-conformity in South Africa. The survey results showed that two in four South Africans indicated they would accept an LGBT family member, while 51% of all South Africans believed that LGBT people should have the same rights as all citizens (The Other Foundation, 2016:3). Following on 'Progressive Prudes', their study on LGBT spending, 'The Pink Rand' (2017), acknowledged the economic segment of the LGBT community and the recognition of the pink rand and its contribution to the larger economy (The Other Foundation, 2017:4). International recognition is supported by UNWTO which published two LGBT reports in 2012 and 2017, recognising the community on a global scale and informing businesses to realise the business opportunities. For LGBT people to be included in culture and tradition was the view of one out of every two people, who believed a sense of belonging was important to people (The Other Foundation, 2016:4). LGBT spaces allow people to relate to others, and identify and validate their existence in that they feel part of a community within a space where they socialise (Waitt & Markwell, 2006:5). Participants 4, 6, 8 and 12 shared the viewpoint that because of the change in societal attitudes, the [gay] community has more options of social spaces to frequent. This is supported by Participant's 1 response to the pink market's being "very mixed". Previous scholarly articles by Hattingh (2019), Rink (2016, 2019), and Visser (2014), all support that the pink niche has transitioned to the mainstream. The de-gaying of De Waterkant has seen gay businesses closing or moving to new premises, replaced by new businesses patronised by heterosexual customers (Visser, 2014:474). Over time the village has changed owing to new building developments, societal changes influenced by social media, and the opportunity to explore new destinations when travelling. This transition was further supported by the UNWTO's

publication of two LGBT (2012 & 2017b) reports specifically targeting the international traveller to new destinations in countries where legislation has changed. In addition, the 2017 report also calls on businesses to open their doors and see new opportunities in welcoming LGBT travellers to their establishments (UNWTO, 2017b:56). By expanding the business and in view of the changing pink niche, Participant's 12 business transitioned to the mainstream. The business opened in 2006 as a 'gay only' business, hosting annual summer parties. Business boomed when the overseas visitors arrived annually in the summer. "Our summer suited them perfectly", as it would be winter in Europe or America. "We purchased additional property and expanded the business and it was in 2013 when we noticed the gay market was getting smaller as the number of bookings was dropping. We realised we had to do something ... we had rooms to fill and staff to pay. The decision was made no longer to be exclusively gay, and gay bookings slowly dropped and we started accepting bookings from heterosexual guests. In the beginning we did have a few comments from customers not knowing it was a gay-only business, but it all worked out in that guests didn't mind suggesting it was irrelevant to guests the hotel was exclusively gay." "Things were evolving," Participant 12 said, noting that South Africa and the Constitution had changed. Participant 4 supported the statement by responding, "Yeah, its 90% women ... Absolutely. And that's, well, that's our bread and butter. That's, you know, unfortunately, if we had relied on the pink community, we would have closed long ago." This narrative suggests the business transitioned to the mainstream because the business expanded, and the pink niche was not large enough to support the business. In addition, the overseas visitors declined in numbers, suggesting they holidayed in other countries or visited elsewhere in SA. In summary: business had expanded, gay bookings had dropped, staff had to be paid, and legislation had changed, recognising LGBT people being able to get married and adopt. For Participant 12 to sustain his business, the owner acknowledged the business had to transition to the mainstream to enable it to continue business in the hospitality sector. Participant 4's business, which opened as a 'gay only' establishment, now identifies as a mainstream business and is no longer exclusive. Participants 4 and 12's examples support the views of previous scholarly articles that the pink niche market has transitioned. Businesses need to recognise the challenge of the reduced size of the pink niche and transitioning to the mainstream is something for business owners to consider for long-term sustainability. Although the change in societal attitudes is welcomed and good for social cohesion and inclusivity, the mass acceptance of the gay lifestyle and community by South Africans has affected pink-specific businesses.

5.4.6 Theme 5: External factors

Business owners can influence and control the marketing mix of a business with regard to the four Ps of marketing in that they can decide on the product to offer, what price to charge, and how to reach their customers through their choice of distribution (Obermiller et al., 2008:21). External factors, including those that are social, legal, economic, political and technological (SLEPT), are those influences over which businesses have no control (Burns & Novelli, 2006:8-10). The five listed external factors will impact a business at some point, presenting challenges or opportunities, and resulting in a shift in marketing activities. To remain informed, businesses need to monitor the niche in which they operate constantly. As Participant 12 stated, “The evolution has happened, people don’t identify with gay places only.” The market is further influenced by socio-economic and environmental matters like crime, and the water and electricity crisis. In the case of South Africa, societal change came about by leaving behind an apartheid era (Venske & Hattingh, 2012:3). The hosting of the 2010 FIFA World Cup™ (Rink, 2016:28) catapulted South Africa into the international arena during the televising of soccer matches in the different provinces, with teams and film crews travelling through South Africa. Tourism numbers increased from 8 073 552 million (2010) to 14.62 million (2013) owing to loyal fans who extended their trips by participating in tourism activities (StatsSA, 2020). Before each televised game television footage was shown of the local areas where games were played. Post 2010, SA tourist arrivals has increased annually to reach 16.65million in 2019 increasing annually (StatsSA, 2020). Participant 2 commented: “After South Africa hosted the World Cup soccer in 2010, everyone in the tourism market benefited because of the international exposure.” From 2012 to 2013, Participant 2 further noted that the gay market was diminishing owing to a “drop in bookings” from seasonal visitors who visit annually from September to April during Cape Town’s peak season. Participants 1, 4, 6 and 11 said the pink village (De Waterkant) underwent changes from 2014 because of developments like retail and residential spaces being built, resulting in residents moving out of the De Waterkant area. In some cases, the transition to the mainstream market happened unintentionally, and in reaction to external factors combined with the need to generate revenue to sustain business. This was the case with Participant 4, who described how their business unexpectedly found itself thrust into the mainstream:

When our business started, its target market was the gay sector. We found that we couldn’t fill the restaurant every night of the week and then we had requests to host hen parties through normal bookings. When noticing the increase in bookings for hen parties, we tried

to reserve Friday evenings for gays only. That continued to be a challenge as we couldn't fill the restaurant. Soon word got out, bookings were abundant, and people just started coming to the restaurant and show, whether it was a hen party, singles and couples coming to socialise. The business became mainstream to the detriment of the gay village. It wasn't a conscious business decision to change anything.

Social change came about through social acceptance, resulting in society's accepting same-sex relationships and gay marriages (Visser, 2014:472). Social acceptance in South Africa has become the norm: same-sex couples get married, adopt children, and form families, changing the concept of what is known as a traditional family. This acceptance has also helped to develop Cape Town as a gay wedding destination (Milani & Wolf, 2015:166). This has resulted in the broad acceptance of non-traditional families. Consequently, most people are not sensitive to gay or straight spaces, and generally seem to socialise wherever they wish, regardless of whether it is considered a typically gay or straight space. Participants 4, and 9–12 were of the view that, in a social context, nobody cares whether you are gay or straight. This collective viewpoint is explained by Participant 10, who stated that engagement with and among customers occurs “as they want, whether pink or not”. In agreement, Participant 3 expressed that “...keep[ing] my business relevant to society and the LGBTQ customer's needs opens the business up to a variety of audiences, giving people what they want”. Participants 4 and 8, who initially opened as exclusively gay venues, now host mixed nights (for heterosexual and LGBT customers), while others host hen and bachelorette parties for heterosexual guests, suggesting that the pink niche has transitioned to the mainstream market. Similarly, the typical pink businesses have used a variety of generic online platforms such as Tripadvisor, Booking.com, Instagram, and Facebook, due to low costs and convenience. Media platforms allow pink businesses to build relationships with customers as they allow them to reply to customers' comments and give them feedback on written complaints. Given that Participants 2–4, 6, 10 and 12 have over 10 years' industry experience in the pink niche, it is clear they are happy to serve all customers, irrespective of sexual orientation. The number of years' service suggests the owners are knowledgeable about the industry in which they operate. It also suggests the importance to them of being a successful business. From participants' insights, it may be argued that synergies do exist between the pink and mainstream leisure market, and the pink niche market can exist in its current market or transition to the mainstream.

Social media has also changed the space people socialise or how they engage with one another (UNWTO, 2017b: 67). “Tourists and local visitors do not have to go to ‘gay-only’ places to socialise or meet,” said Participant 9. “Meeting socially can be anywhere you like these days,” continued Participant 9. Social media as a digital disruptor has changed the social space, including the broad acceptance of pink lifestyles and lifestyle products (UNWTO, 2017b:67). The social space has changed because of social media, in that initial conversations happen online, as suggested by Participants 1 and 3. People seek friendship and relationship possibilities online via dating apps if they so desire (UNWTO, 2017b:68). The era of social media has changed the way pink tourists engage with one another and utilise traditional meeting places. Social media profiles are uploaded, including photos, hobbies, likes, dislikes, and a range of related information. This gives browsers the option of meeting online and initiating contact should they wish, also not committing to anything. As this happens online, one should remember that no business establishment has been visited. If participants feel comfortable, they take the next step of deciding whether to meet in person or not. The venue for a face-to-face meeting is only decided upon after the online engagements, and where both persons feel comfortable. For gay people, this doesn’t necessarily mean the venue to meet up will be a gay business situated in the pink village. Gay people view themselves as being socially integrated now, and the LGBT community don’t find themselves restricted to pink businesses only (Waitt & Markwell, 2006:36). Similarly, other businesses in the pink niche market have begun to embrace the shift to the mainstream market, either by choice or other circumstances in order to sustain their business. Participant 8 stated in the interview that the ‘gay-only’ steam baths in De Waterkant had started hosting mixed nights since March 2019, and in so doing included the mainstream market in a previously ‘gay-only’ venue. “The market is exactly the same and I would market a pink and mainstream businesses the same,” was the opinion of Participant 9. For most participants, the exclusive niche is neither relevant nor financially viable, as explained by Participant 6: “Pink tourism is becoming less and less relevant, as by not labelling our business and being inclusive, we engage with our customers as they prefer.”

The findings suggest the pink niche has shifted in Cape Town for legal reasons (The Other Foundation, 2016:9) and further influenced by societal and economical changes brought about by redevelopment, thereby thrusting the niche into the mainstream (Hattingh, 2019:138).

5.5 Transitioning of the Niche

The themes presented in this chapter share common elements related to changes in the tourism market, and more broadly to changes in society. Further analysis of the findings suggests that the transition in the pink niche occurred owing to a combination of forces influenced by market and societal change as illustrated in Figure 5.4 overleaf. In this study, market change would be referenced to the de-gaying of De Waterkant, changing the landscape of the once pink village. Inflation and crime would also be considered with regard to changing the market. Societal change was brought about by social mobility and a change in the law that gay couples could adopt children (Hattingh, 2019:139). Hattingh (2019:139) notes how progressive attitudes and mixed leisure spaces have “blurred, fractured and intermingled” the difference between gay and straight spaces. The diagram depicts how market and societal forces combine to push the pink niche into the mainstream market. The market force relates to the change in demand for services in restaurants, accommodation, bars and clubs. The societal force relates to social media, culture, societal acceptance. The concept of a traditional idea of a family has changed by LGBT singles or couples fostering and adopting children. In a survey conducted by the UNWTO, it was noted that 68% of LGBT parents chose a child-friendly holiday destination (UNWTO, 2017b:75). The combination of these forces could be applicable in other areas of change as it relates to the demands of the consumer and the market. When this change occurs, it is important for businesses to review their strategy and whether they still meet and serve the needs of their customers and the market in which they do business. The development of a marketing strategy for a business is important when starting a business or when reviewing the process. The marketing framework should include its linkages from business, supplier, product and customer to establish lasting relationships, as this will support the sustainability of the business (Department of Tourism, 2017a:20). As Participant 9 eloquently stated:

Your money is as good as anybody else's. It's not painted pink when you hand it over to the cashier. When you're buying something, they look at you as a person... For anybody... And unfortunately, when you walk up to the ... to pay your bill, they don't discern whether it's got a pink tick on it or a pink mark on it or not.

This statement epitomises the underlying forces that are pushing and pulling pink niche tourism businesses into the mainstream. The Other Foundation (2017) and the UNWTO-LGBT reports (UNWTO, 2012, 2017b) note the value of the pink rand for business opportunities, as well as its

contribution to the economy and jobs, thereby pulling this niche into the mainstream. Academic articles by Visser (2014), Hattingh (2019), and Rink (2019) on the pink village and the de-gaying of De Waterkant, note gay businesses relocating across the city. This was due to new developments in the area such as new office, retail and apartment blocks charging higher rents. This could also be referred to as the disruption of the niche. In the midst of the growing acceptance of LGBT individuals and communities within society, and the impact this has on the mainstreaming of consumers, a tourism niche built upon sexual identity is bound to be fragile. The social and market forces have been more powerful than any single business's desire to remain 'exclusive' to a pink niche market. As the themes above reveal, this transition is complex, and the success of the business in a mainstream market is dependent on the management's ability to navigate a great number of challenges.

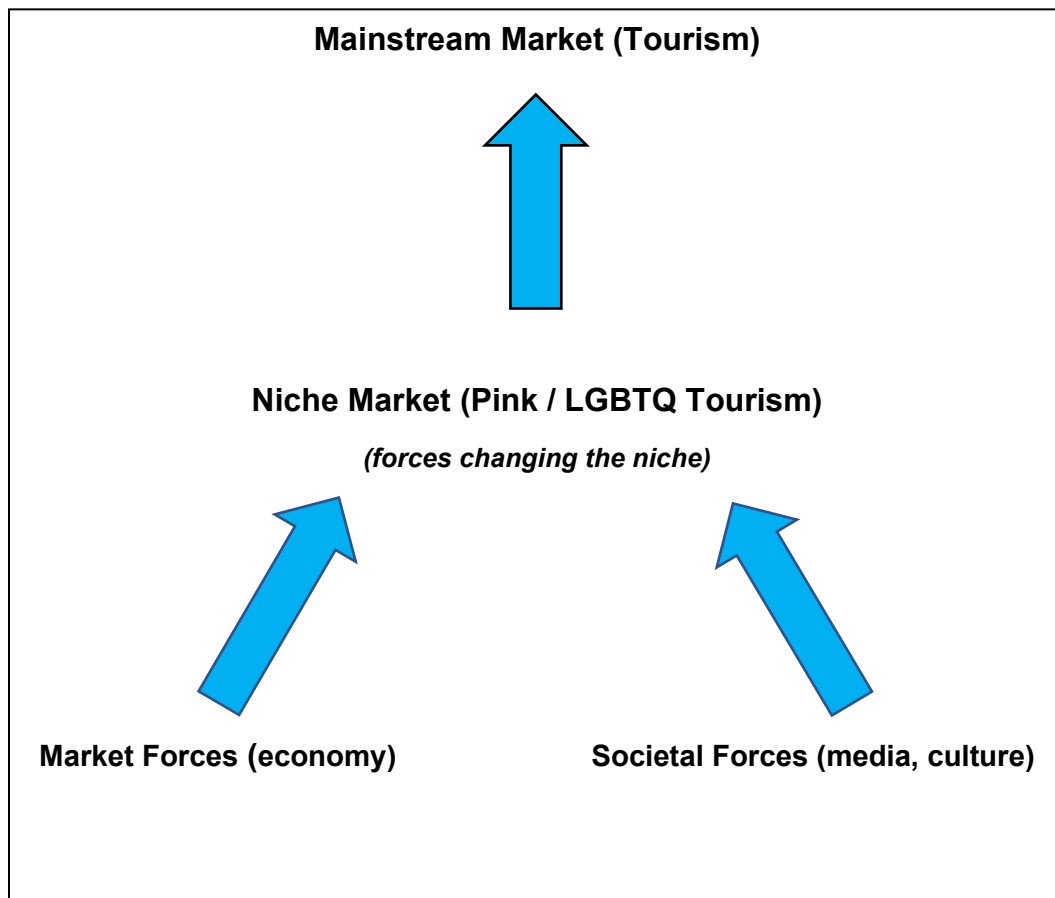


Figure 5.4: Transition of a niche market (researcher's own construct)

5.6 Summary

The findings presented in the chapter revolve around five themes, which together highlight the factors that have pushed and pulled participants' businesses from the pink niche to the mainstream tourism market. The data were extracted from in-depth, semi-structured interviews with 12 participants, and analysed through an inductive method. It emerged from the findings that two of the participants' businesses had transitioned from the pink tourism niche to the mainstream tourism market at the time of the research. The remaining ten were in their own way dealing with the challenges of a shifting pink market. Comments and information shared by the participants were included to underscore the arguments made. The researcher focused on the participants' responses by probing statements and responses during the interviews. The findings are those expressed from the participants' point of view or experience in the niche. The researcher remained objective in presenting the findings and the participants' views and opinions as clearly as possible (Creswell, 2014:186). As illustrated in Figure 5.4 above, transitions from the pink tourism niche were driven by both market-related change and societal forces. The findings from the five identified themes articulate the hidden forces that are pushing and pulling pink niche tourism businesses into the mainstream market. The combination of social and market forces has been more powerful than any single business's desire to remain 'exclusive' to a pink niche market. Market transitions such as those detailed in this chapter demonstrate the complexity of navigating a shifting business and social landscape and help to respond to the research aim and objectives of this study. The objectives of the study were addressed in that the state of the pink tourism market was revealed through a subset of businesses in the pink niche. The next chapter focuses on this response to the main research questions, revisits the aim and objectives of the study, and considers the impacts of its findings.

CHAPTER 6 CONCLUSIONS AND RECOMMENDATIONS

6.1 Introduction

The concluding chapter draws from the completed data collection and analysis, and makes recommendations.

The aim of the study was to explore how the pink tourism business sector can diversify and expand its niche product offering to transition to the mainstream leisure market for long-term sustainability. In support of the aim, the main objectives of this research were to:

- determine the current state of the pink tourism market in Cape Town
- identify a subset of service providers in the pink tourism sector that have transitioned to the mainstream market, exploring the marketing strategies adopted
- explore the synergies between pink tourism and the mainstream leisure tourist market in Cape Town
- determine the barriers to growth in the pink niche tourism sector
- consider the viability of pink niche tourism in the context of social change in South Africa

In Section 6.3, the outcomes of each of the above objectives are discussed, including how they were achieved and their implications for the main research aim.

6.2 Summary of the Research

The significance of this study lies in its focus on a unique tourism and leisure niche, born out of South Africa's democratic transition and increased visibility and acceptance of LGBT individuals. The development, growth and transition of the pink niche market is thus embedded in South Africa's post-apartheid transition. This study closes the gap of knowledge in pink tourism market transitions, and contributes to the future development and sustainability of the industry, resulting in South Africa remaining competitive as a destination of choice. Furthermore, the results of this

study address a dearth in the literature on pink niche tourism, particularly in the sense of how the niche is changing as a result of a combination of market and societal forces.

The formation of the pink tourism niche in De Waterkant, Cape Town, was an unplanned event, heralded by the opening of two businesses. Situated on the edge of the central business district in a semi-industrial and semi-residential area, the pink village soon thrived with the opening of gay-only spaces catering to the LGBT market. Since hosting the first MCQP in 1994 and becoming an annual event on the international gay calendar, Cape Town has been a gay destination for locals and international tourists. The gay village catered to the LGBT sector, offering accommodation, bars, saunas, nightclubs, escort agencies, clothing outlets, restaurants, and interior shops. Realising the market potential due to its location, developers moved in and built mixed-use buildings catering to retail and residential tenants. As society evolved through change of attitudes and acceptance of LGBT people, social inclusion became the norm. Gay-only businesses would now have to rework their business model and marketing approaches for long-term sustainability and to continue operating in the relevant business sector.

This study sought to explore how pink tourism businesses can diversify their niche product offerings to transition to the mainstream market for long-term sustainability. The sustainability of a business is key, as it contributes to the economy and creates employment in the Western Cape. Data was gathered through a series of interviews with business owners or managers within the respective businesses. Pre-determined questions were asked; however, the interviews were semi-structured, allowing for opportunities for information to be made available with follow-up questions. Two businesses that had transitioned to the mainstream were included in the study.

6.3 Discussion and Summary of the Study Objectives

The results of this study achieved the stated aim through attainment of five main objectives, discussed below. In each case, the objective and its implications for the research aim are discussed.

6.3.1 To determine the current state of the pink tourism market in Cape Town

To support the aim of the study, the first objective was to determine the current state of the pink tourism market in Cape Town. Like other sectors, the pink niche has not been immune to business

closures and relocations. Yet, in the case of the pink niche in Cape Town, few recent studies have provided a barometer of its current state. Thus, the achievement of this objective provided an up-to-date state of the niche in terms of the profiles of businesses that still operate in the niche. By determining the state of the market, the information provided assists tourism bodies with issues to address to support businesses. The pink market has been disrupted through factors such as new property developments in the former heart of the pink village, the rise of social media, and changes in societal attitudes and legislation. The pink tourism market has diminished in size owing to residential and leisure property developments in the pink village that cater to broader markets beyond the pink niche. The residential re-development of the Cape Quarter Lifestyle Village Piazza is just one example of the property-driven market changes that have pushed the pink niche into the mainstream. These developments have seen businesses relocating to other parts of the city, and thus have dispersed what was once a geographically and socially concentrated pink community of businesses and patrons from De Waterkant.

The re-distribution of pink niche businesses across the city has shattered the shared sense of community that once existed. The lack of a common objective within the pink tourism sector has made it difficult for businesses to establish meaningful representation to government entities like Cape Town Tourism, WESGRO and the Western Cape Government. As Cape Town Tourism has promoted through its marketing material, the pink niche is viewed as part of mainstream tourism by being a “inclusive city”. This study, as the findings suggest by the research conducted on pink business owners, suggests there has been a shift in the market from a niche to the mainstream.

6.3.2 To identify a subset of service providers in the pink tourism sector that have transitioned to the mainstream market, exploring the marketing strategies adopted

Identifying a subset of service providers for the study was important in that their knowledge and experience in the pink niche provides supportive information in achieving the aim. To achieve this objective, two businesses that had transitioned to the mainstream market were identified. Both businesses operate in the accommodation sector and were formerly part of the pink tourism niche. It is telling that both transitioned businesses are part of the accommodation sector within the ‘amenities’ segment of the destination amalgam. Given the history of discrimination by hotels against same-sex couples (Jones, 1996), and the combination of societal and legal changes over the past decade, it is understandable that market transitions would hit the accommodation sector

more profoundly. The transitions for both businesses happened as the niche reduced in size, LGBT travellers sought a broader range of accommodation options, and business owners were forced to accept bookings from families and broader audiences in order to sustain their market share.

Participant 2's business transitioned to the mainstream through social media, using Tripadvisor. The guesthouse opened as an exclusively gay business and was marketed as such. Marketing was done in gay publications and the business was a member of Cape Town Tourism. Local and international guests would post comments on their experience on Tripadvisor and booking enquiries were made. Guests were informed it was a gay business and potential guests asked why they could not make a reservation. The business owner and his partner made a business decision to accept reservations from travellers who did not mind staying at an exclusively gay establishment. The decision to enter the mainstream was influenced by a social media app, Tripadvisor. Another participant, who has owned a gay-exclusive hotel for the past 14 years, reiterated the transition to the mainstream was due to a number of factors. These include expanding the business by acquiring and renovating an additional property, societal change, and the gay market reducing in size. With the expansion of the property, additional rooms had to be filled through a broadening of their client base. This was made possible by greater acceptance of LGBT travellers across the greater tourism sector. The reduction in the pink market was not due to fewer LGBT self-identifying individuals, but rather to the dispersal of market demand to other (non-pink) businesses. Although LGBT travellers still make use of tourism sectors such as accommodation, they no longer search for exclusively gay hotels. Rather, they can choose to stay at mainstream hotels and demand to be treated as equals. This dispersal of market demand has become exacerbated by other factors, including the oversupply of accommodation in Cape Town and market disruptors such as Airbnb which have given tourists additional accommodation options.

These two examples of businesses that had transitioned to the mainstream are supportive of the fact that businesses that had operated in the pink niche can transition. The business approach and experience can be of value to the tourism industry in that a new business strategy or approach can be developed to guide business owners. This strategy could be from a marketing or business management approach. The remaining sampled participants continue to operate in the pink niche; however, their customers include heterosexual patrons who do not mind frequenting businesses on their own or with a group of friends. Participants 4, and 9–12 were of the view that, in a social

context, nobody cares whether you are gay or straight. This collective viewpoint is explained by Participant 10, who stated that engagement with and among customers occurs “as they want, whether pink or not”. In agreement, Participant 3 expressed that “...keep[ing] my business relevant to society and the LGBTQ customer’s needs opens the business up to a variety of audiences, giving people what they want”. Participants 4 and 8, who initially opened as exclusively gay venues, now host mixed nights (for heterosexual and LGBT customers), while others host hen and bachelorette parties for heterosexual guests, suggesting that the pink niche has transitioned to the mainstream market

6.3.3 To explore the synergies between pink tourism and the mainstream leisure tourist market in Cape Town

The pink niche and the mainstream target the same market. This target market shifted owing to changes in legislation recognising LGBT people and their right to marriage and adoption. As in any business, customers are the *raison d’être* of the business, and are needed to sustain the business in the industry. The products and services offered are transversal in the industry, irrespective of the niche it serves. The pink niche offers products and services that are easily transferred to a mainstream market (and vice versa), and thus pink travellers have an array of options to choose from in the accommodation sector as discussed in the findings above. At the same time, former pink niche businesses can offer accommodation to mainstream travellers, since the product itself is easily adapted to a new market. The synergy of services would be most evident in the accommodation sector. The broad range of services offered by both pink niche and mainstream accommodation providers is similar. It includes tours, spas, car hire and in-house dining. Most of the sampled businesses in this study are in the amenities sector of the destination amalgam. All the services offered by the sampled businesses are those which can operate in the mainstream environment, suggesting that niche services are suited to the mainstream sector. Businesses can decide how they wish to continue to operate.

6.3.4 To determine the barriers to growth in the pink niche tourism sector

In an effort to explore how pink niche businesses might transition into the mainstream, this study also sought to identify the barriers to growth. At the height of the pink niche market’s development, many businesses targeted lucrative international LGBT travellers. Therefore, competition within

the niche was based upon price. Pink niche businesses thus focused on maximising revenue by targeting high-spending international tourists (Gay European Tourism Association, 2015). The effect of this was to exclude local travellers, based on price. As international tourism continued to grow in Cape Town – and within the niche specifically – many businesses assumed that customers would continue paying increasingly higher prices. By charging high prices, businesses excluded the local market, creating a barrier to the growth and sustainability of their businesses. Businesses assumed international tourists would sustain the industry, and constantly increased prices. Businesses operated independently, making it difficult to form a representative body. As one participant commented, everybody was going at their own piece of the pie and everybody was fighting for business. Owing to the silo approach, it was difficult to be recognised as a niche operating in the pink tourism sector and being represented in the tourism sector. With little or no business support from Cape Town Tourism and the Western Cape Government, pink niche businesses found it challenging to negotiate trade deals from suppliers and lost networking opportunities in the tourism sector. A participant who was a member of Cape Town Tourism for three to four years commented the body was not interested in small boutique hotels, and that they were poorly managed did the city a disservice. It was said Cape Town Tourism and South African Tourism were not affected at all by what the niche was trying to achieve in serving the tourism sector. The oversupply of accommodation in the industry resulted in market saturation, and there was a plethora of price-sensitive accommodation for local travellers.

By operating independently and failing to recognise price sensitivity of local travellers, the pink niche began to undermine itself. These two factors had created a barrier, as the mainstream market was thriving. As the niche had no recognised representative body, additional challenges came about when trying to partner with government entities or representative bodies to support the pink niche. Effectively this left every business to fend for itself, with no guidance or support to sustain a business within the niche or transition into the mainstream.

6.3.5 To consider the viability of pink niche tourism in the context of social change in South Africa

There is an opportunity for the pink niche to exist independently or as part of the mainstream market. Societal change and attitudes have created space for an integrated pink market in the tourism sector. The viability of the pink niche in the tourism sector from the context of social change in South Africa could be two-fold. The data from the study reveal that the pink village in

De Waterkant, as the former focal point of the pink niche, reduced in size because of a number of reasons as revealed in the above findings. These include property redevelopment in De Waterkant; minimal support from government; disruption and evolution of the market through social media; lack of pink niche business cooperation, meaning that most were operating in isolation; and changing attitudes due to a combination of legislation and the visibility of LGBT individuals in society. The findings above highlighted that sampled business owners undertook marketing activities without understanding the role of marketing in sustaining the pink niche. In addition to these factors, participants highlighted government's handling of social issues like unemployment, crime, and the water and electricity crisis, which impacted negatively on business as participants 11 and 12 mentioned.

The business challenges are supported by a study done by Hattingh (2019:136): the de-gaying of gay villages is happening worldwide because of 'heterosexualisation'. In the case of Cape Town, factors business mentioned are technology, social media apps, societal attitudes, adoption, temporary 'gaying' of straight places, mixed leisure spaces, and same-sex marriages. In addition to these challenges is the resistance of the De Waterkant Civic Association, whose new residents have lower tolerance of gay lifestyles (Hattingh, 2019:141). Previous studies (Visser, 2014; Rink, 2016) have signalled the demise of the pink village. The findings of this research further suggest that pink tourism is becoming less and less relevant, as businesses prefer not to label their market focus, but rather engage with a wide array of customers. The pink niche is becoming less relevant, while its small size and dispersal make it unsustainable.

With greater visibility of LGBT individuals, and a wide array of available travel and leisure options available to them, the pink niche is not sustainable. The niche is fragmented, owing to business owners' attitudes and locals with limited disposal income. The businesses find themselves at a crossroads: how do they pursue the pink niche and whether their current business model is sustainable. The findings of the research and the recommendations made could be viewed as supportive methods for a niche business to transition to the mainstream market thereby ensuring the sustainability of the pink tourism market.

6.4 Recommendations

This section makes recommendations regarding the study, grouped into two sections. The first section makes recommendations for pink business owners, while the second section makes recommendations for tourism marketing.

6.4.1 Recommendations for Pink Business Owners

- As this and previous studies suggest, there is a need for gay leisure spaces, whether exclusively gay or gay friendly, with some outside the general borders of a gay village defined as businesses serving the LGBT sector which are gay or not gay owned (Visser, 2014:473; Rink, 2016:22). Therefore, the opportunity for pink business owners to sustain their business exists within the pink niche or mainstream market (Novelli & Benson, 2005:250).
- A representative body can be formed to represent the niche market as a collective. The representative body can comprise pink business owners and representatives from the City of Cape Town, Cape Town Tourism, WESGRO and other relevant stakeholders. This can be done by current business owners or with the support of Cape Town Tourism.
- The representative body can lobby with WESGRO, Cape Town Tourism and the City of Cape Town to be invited to tourism and business sector meetings. Additional activities could be representation at tourism-related workshops within Cape Town and the Western Cape.
- The representative body in the pink niche should host monthly meetings to network among themselves or others in the various tourism sectors.
- Outside the monthly meetings, business workshops could be held in the form of training and by inviting industry experts to share business practices and experiences.
- Businesses can refer new business to different sectors if overbooked or guests enquire about activities when on holiday, ranging from where to dine or places to visit.
- Through the representative body, businesses can negotiate discounted rates with suppliers, ranging from produce to business essentials and buying locally.

- The representative body can negotiate stalls for its members at Pride and other pink events.
- The representative body can negotiate stalls at local lifestyle markets or other mainstream events like Carnival, the night market hosted in the Company Gardens, First Thursdays, and the switching on of the Festive Season lights in Adderley Street. All these mainstream events are hosted in the city and attract mixed groups.
- The representative body can attract the locals in the slow months of winter by offering discounted rates for accommodation or running promotional specials for the local community. This promotion can be extended to other provinces.
- The representative body should adopt a standardised approach to onboarding new SMMEs from the pink niche.
- The Other Foundation can be engaged in respect of their long-term strategy in supporting and networking for LGBT businesses. The identified entity can re-establish its initiative of supporting LGBT businesses.
- Businesses in the accommodation sector can form partnerships with small independent travel agencies and airlines for accommodation bookings.
- Education workshops can be held for staff working in the various pink business sectors to sensitise them to the LGBT community on issues like marriage, citizen rights and LGBT couples with adopted children. These could be funded by large corporate companies in the tourism sector, Cape Town Tourism, City of Cape Town or the Department of Tourism.
- Through Cape Town Tourism and the City of Cape Town, the Department of Tourism can be lobbied to support a combined LGBT marketing strategy for South Africa.
- Those businesses who wish to remain in the pink niche should adopt a 'long tail' tourism approach (Lew, 2008:412) making use of the disruptive yet market-focused potential of social media in order to target a small but identifiable market niche.

The above recommendations speak to the isolation of businesses in the niche, and their lack of marketing knowledge and basic business processes revealed in the findings.

6.4.2 Recommendations for Tourism Marketing

Government and regulatory bodies could engage with the business environment to better understand the niche and what planning is required to bring the niche into the tourism industry to work as a collective. This approach would be important to re-establish relationships to market the pink tourism and mainstream sector effectively.

- Government and regulatory bodies in the tourism sector reconstitute and engage with business. The learnings from these engagements could be used in providing further information and knowledge for pink businesses wanting to transition to the mainstream and what marketing support is required.
- LGBT marketing and messaging for future marketing campaigns for government, regulatory bodies and business can be structured towards the various niche markets.
- The LGBT sector could be mentioned in all mainstream marketing material, reminding local and international markets that Cape Town is gay friendly, and South Africa being an inclusive country.
- WESGRO could be used as a pink sector marketing vehicle and not only for the mainstream sector. Annual pink events could also be marketed in its quarterly report.
- Western Cape Government and the City of Cape Town need to address the crime and electricity crises in the country. These crises impact the industry directly and especially smaller businesses that can't operate a business with an unpredictable energy supply.
- LGBT events can be used to build the image of pink tourism worldwide by forming strategic partnerships with IGLTA and the UNWTO.
- A collective marketing strategy should be developed with all tourism operators, Cape Town Tourism, and other stakeholders to adopt a cohesive approach to building the brand.
- Educational workshops should be held to build awareness of the importance of marketing and promotional materials for all industry players. Staff should form part of these workshops in how they contribute to positive customer experiences and building a brand.

6.4.3 Recommendations for Future Research

Tourism plays a key role in contributing to the economy and in the creation of jobs. In spite of the growing acceptance and mainstreaming of LGBT individuals and communities across South Africa, the needs of these travellers will continue to be satisfied through a combination of niche and mainstream businesses. Yet, as demand for tourism grows together with market competition, more and more pink niche businesses will need to consider opportunities in the mainstream. For the sustainability of the tourism industry in Cape Town, the niche should not be ignored and should be explored further by engaging with businesses that still identify as pink, or those who had transitioned, to better understand the market for sustainability. This would also assist the industry to better understand the current state of the market, how business views the future, and what support or guidance is required. The Western Cape Government, Cape Town Tourism, and regulatory bodies can determine their position, what support and role they play in the future of tourism supporting niche markets, and how these may be sustained.

Future research should study the following aspects:

- Long-term case studies of pink niche businesses that have transitioned or are in the state of transition.
- Demand-side perspectives of pink niche transition, from the perspective of travellers.
- The COVID 19 pandemic has had a devastating impact on tourism worldwide and will certainly have an impact on pink tourism and other niches. This calls for future research in the impact of the pandemic on pink tourism.

6.5 Limitations of this Study

- This research addresses the transition of the niche to the mainstream sector from an LGBT perspective. As the pink niche in Cape Town is small in size, and as many businesses had closed, the sample size was limited.

- This study focused on Cape Town as a pink niche tourism destination. Other similar markets exist in South Africa, and thus the findings may speak to particularities of the destination itself.

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APPENDICES

Appendix A: Research Questionnaire

Summary of research and participant role:

The lesbian, gay, bisexual and transgender (LGBT) tourism market, also known as 'pink tourism', has developed into an important niche market in Cape Town. The aim of this research is to explore how tourism businesses within this niche transition to compete in the mainstream leisure market and the marketing transitions that businesses undergo in the context of social change. Social change came about due to greater LGBT acceptance of individuals in the broader community and legislative change that protects individuals. This study seeks to understand the shift in marketing practices from a niche market to the mainstream leisure market. The transition may be evidenced by changes in the marketing mix through its product, price, place and promotion that appeal to the LGBT individual and broader mainstream leisure market. This research consists of semi-structured interviews of businesses that have transitioned to the mainstream leisure market. Results of this study explore the synergies between LGBT tourism and the mainstream leisure tourist market in order to understand barriers to growth within the pink tourism niche.

Semi-structured interview questions follow on the objectives of the study:

1. Trends in the pink tourism sector in Cape Town from 1994 to present
 - When did you start your business in the pink tourism sector?
 - What are the trends specific to the market in the pink tourism sector?
 - What are the trends specific to tourists in the pink tourism sector?
 - How viable is the pink tourism niche in the context of social change in South Africa?
 - How have changes in the social acceptance of pink communities been reflected in the local tourism market?
 - How would you describe the changes in the pink tourism sector in Cape Town since starting your business?
 - Which role players have you engaged with in the pink tourism sector?
 - How has your business responded to changes in the pink tourism sector?
 - What changes has your business responded to in the pink tourism sector?

2. Synergies between pink tourism and the mainstream leisure tourism market

- How are the pink tourism and mainstream tourism sectors related in Cape Town?
- How do pink tourism and mainstream tourism share clients?
- What products do the pink tourism and mainstream tourism sector share?
- How are the marketing approaches different in the pink tourism sector and the mainstream tourism sector?

3. Barriers to grow a pink tourism business

- What are the challenges to growing your business in the pink tourism sector in Cape Town?
- When starting your business, did you approach any tourism body for assistance?
- Why is it important to be a member of a tourism body?
- What are the reasons you view important to be a member of a tourism body?
- How have you changed your marketing mix (product, place, price, promotion) in response to challenges?
- Which media platforms do you use to promote your business?
- What tools do you use to monitor business activity after a marketing campaign?

Appendix B: Ethics Approval



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Office of the Chairperson Research Ethics Committee	Faculty: BUSINESS AND MANAGEMENT SCIENCES
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At a meeting of the Research Ethics Committee on 02 May 2017, Ethics Approval
was granted to Kenneth George Lawrence (204175771) for research activities

Related to the MTech/DTech: Master of Marketing at the Cape Peninsula University of Technology

Title of dissertation/thesis/project:	EVALUATION OF THE PINK MARKET AS A MAINSTREAM BUSINESS: A CASE STUDY OF CAPE TOWN TOURISM SECTOR Lead Researcher/Supervisor: Dr N. Haydam & Ms E. Venske
---------------------------------------	--

Comments:

Decision: APPROVED

	02 May 2017
Signed: Chairperson: Research Ethics Committee	Date

Clearance Certificate No | 2017FBREC444

Appendix C: Editor Certificate

ELIZABETH S VAN ASWEGEN
BA (Bibl), BA Hons (English language & literature), MA (English), DLitt (English), FSAILIS

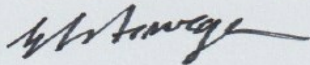
Language and technical editing | bibliographic citation

DECLARATION OF EDITING

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The MTech: Marketing Management thesis by candidate **Kenneth George Lawrence** titled 'The Sustainability of Pink Tourism Businesses In Cape Town: Transitions to the Mainstream Leisure Market' has been edited, the references have been checked for conformance with the CPUT Harvard bibliographic referencing style guide, the in-text citations have been checked against the references, and each item in the references has been checked against the text. The candidate has been advised to make the recommended changes.



Dr ES van Aswegen
12 November 2020