Corporate Brand Portfolio Management

A research report submitted by

LOUISE SEVEL

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ABSTRACT

Many organisations consider their brands strategic assets and want to manage them accordingly. The adoption of a corporate brand strategy is one way in which organisations show their commitment to being a brand-focused business.

Organisations do however often find it difficult to translate the theory on corporate branding into practice. There are a number of reasons for this; in essence, brands are not always created equally due to the fact that organisations often inherit brands through mergers and acquisitions, each bringing with them a different degree of equity and strength to the brand portfolio.

Aligning and strategically managing the brands in the portfolio is the end goal, but before that can happen, a good understanding of what each brand contributes to the brand portfolio and how best each brand can be leveraged to ultimately support the growth of the corporate brand is required. This is followed by identifying who is responsible for managing the changes in the portfolio and communicating them to the stakeholders.

The research explored the above process and entailed conducting a literature review on the evaluation and analysis of corporate branding and corporate brand management and the basis on which brand decisions are made and the scope of their influence. This was followed up by in-depth interviews with ten purposefully selected, information-rich participants within Tsogo Sun, a pre-selected organisation that comprises a multi-brand portfolio, with the aim of gaining information on their understanding of corporate branding and corporate brand management in practice.

Following the interrogation of the data, it was confirmed that corporate branding in practice cannot always follow the strict approaches proposed by the theory, resulting in a gap between the literature and the practical solution required in order to be suitable for organisational implementation.

The result of the research proposes a framework that aims to address this gap with the intent that the application thereof would make decision-making pertaining to branding easier and keep branding on a strategic level within an organisation.

DECLARATION

I, Louise Sevel, declare that this research report is my own work except as indicated in the references and acknowledgements. It is submitted in partial fulfilment of the requirements of the degree of Masters in Management of Strategic Marketing in the University of the Witwatersrand, Johannesburg. It has not been submitted before for any degree or examination in this or any other university.

_____

LOUISE SEVEL

Signed at 86 Westmeath Road, Parkview, 2193 on ____ day of _____ 2015

DEDICATION

For the boys and the believers

ACKNOWLEDGEMENTS

My journey to obtain my masters degree has been epic. It was not rocky, it was not treacherous. It was like having a personal pack of willing Sherpa's, cheering me on and helping me every step of the way, all the way to the top. I think I am there.

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1. INTRODUCTION

1.1. PURPOSE OF THE STUDY

The purpose of this research is to understand the role and assess the decision making factors that determine corporate brand strategy within an organisation that has a multitude of brands in their portfolio, and to provide a set of guidelines to allow this organisation to manage their corporate brand portfolio more effectively in practice.

The report discusses and outlines corporate brand strategy and the components and associations that influence it in an attempt to understand where the brand management process starts; as well as the intricacies of the corporate brand management function, including corporate brand strategy, brand architecture and brand portfolio management. It also highlights the shortcomings in the academic literature pertaining to corporate brand strategy and brand architecture and the fact that the theory is not always easily translated into practice.

1.2. CONTEXT OF THE STUDY

Studies and results have shown that a dedicated focus on brands has a positive impact on the bottom line (Fombrun, 1996; Keller, 2000; Morgan & Rego, 2009). The resources and focus in most organisations, however, seems to be mostly in the realm of product brands as this is where the short term gain is and there seems to be very little understanding of how to turn this approach into a corporate brand strategy in practice. With corporate branding being a relatively new academic discussion this is understandable. However literature has emphasised the importance of corporate branding and organisations are becoming more aware of the

benefits of adopting a corporate brand strategy (Aaker, 2004b; Fetscherin & Usunier, 2012; Muzellec & Lambkin, 2009; Shahri, 2011).

The point of departure will be to first and foremost understand the role of the corporate brand within an organisation; what it comprises of, what it influences, what it is influenced by and how it relates to the product brand/s and/or organisation and the brand portfolio as a whole. It will go on to address what the brand management function should be and then ultimately who should control and manage the corporate brand strategy and where the role starts and where it ends.

1.3. PROBLEM STATEMENT

Main problem statement

An evaluation and analysis of corporate branding and corporate brand management within an organisation comprising multiple brands, arising from the fact that management do not know what exactly comprises the corporate brand in practice and who is responsible for corporate branding decisions. It is also unclear how the various brands in a corporate brand portfolio influence each other. This includes the basis on which decisions are made as well as the scope of their influence.

Sub problem 1

It is unclear what exactly comprises the corporate brand in practice. The absence of clarity can result in bad decision-making as management are unaware of the factors that influence the corporate brand. This compromises the successful implementation of a corporate brand strategy.

Sub problem 2

The rationale for adopting a corporate branding strategy is not always well thought through as it is often is a result of business decisions made during mergers or acquisitions. Due to this, management are unaware of what exactly is required to manage a corporate brand portfolio comprising multiple brands that might not always have been strategically developed.

Sub problem 3

Organisations do not understand where corporate branding decisions start or end. For this reason, the role of the corporate brand manager is unclear and often not optimised. This makes it very difficult to ascertain the work that needs to be done to build the respective brands, including the corporate brand, in the portfolio with the aim of positioning the corporate brand as the strongest brand.

1.4. SIGNIFICANCE OF THE STUDY

Corporate brand management represents an area that is increasing of interest and significance as organisations have realised that they need to treat their businesses as brands and, for that reason, corporate branding has become the focus area for good research (Morsing, 2002; Mukherjee & Balmer, 2007; Pillai, 2011). This, combined with the fact that mergers and acquisitions of organisations are occurring more frequently, often affecting brand portfolios and the management thereof, has highlighted the need for more research in this area (Muzellec & Lambkin, 2009).

Mukherjee and Balmer (2007) identified four limiting characteristics of what was then available in researching the area of corporate branding:

- The research is prescriptive, offering new ideas and suggestions, but lacks supporting empirical data.

- Current research on corporate branding has not "explored contingency scenarios".
- Corporate branding studies to date have mainly excluded non-profit organisations.
- There seems to be a lack of the "theory of corporate branding".

Although some of the above gaps have been filled with good pieces of research, particularly in the area of corporate branding theory (Abratt & Kleyn, 2012; Balmer, 2012; Burghausen & Balmer, 2015; Fetcherin & Usunier, 2012, Urde, 2013) the research that has been done still does not allow for easy translation into practice (Mingione, 2015; Wang & Chung, 2015).

Having a very good understanding of what corporate branding is and what is required to follow a corporate brand strategy is important, as organisations can no longer rely on differentiating themselves on products, including their benefits and attributes, only. Differentiation relies on the organisation's positioning and this extends further than the area of product branding (Hatch & Schultz, 2001) and relies on careful management of brand architecture and the brand portfolio, both functions of a corporate brand strategy.

This study aims to address the gap in current literature on corporate branding in that it proposes to generate a practical framework comprising a set of guidelines for corporate branding decision-making applicable to organisations that have a multi-brand portfolio.

The application of the proposed framework may also provide guidance to organisations on how to structure or restructure their organisation to manage its corporate brands in a better way once there is an understanding of its role within the organisation.

1.5. DELIMITATIONS OF THE STUDY

- The study is purposefully delimited to the area of corporate branding and the literature that would be relevant to apply in practice.
- This study only considers an organisation with multiple brands, including a corporate brand, in their portfolio.
- The study limits its research to one case (organisation) in order to obtain a deeper level of insight and understanding into the topic.
- Intensive interviews are done only with key decision-makers and influencers within the organisation in order to get the factors that drive decisions around corporate branding directly from them.

1.6. DEFINITION OF TERMS

The main generic concepts that will be discussed in the study are introduced below:

Corporate branding

Aaker (2004b) defines the corporate brand as what an organisation will deliver and support in terms of the product or service that a consumer will purchase. The corporate brand has "access to organisational as well as product associations" (Aaker, 2004b; p.6). The corporate brand is made up of more than customer-based images of the organisation as it relies on the perceptions of all its stakeholders, which include its employees, customers, investors, suppliers, partners, regulators as well as local communities (Hatch & Schultz, 2001).

Brand architecture

Brand architecture refers to the interactions between brands in one organisation's brand portfolio and the management thereof. This interaction can be between corporate brands or product brands and their particular audiences. The way in which this interaction takes place

varies according to the type of architecture of a particular organisation, for example that of a branded house versus a house of brands (Muzellec & Lambkin, 2009).

Brand portfolio

A brand portfolio refers to how the brand architecture is structured – what the scope of each brand is, its role as well as its relationship with other brands.

The aim is create clarity of each brand and allow for synergy in order for each brand to stand alone (Chailan, 2009).

Corporate reputation

Corporate reputation can be defined as a multi-stakeholder concept about an organisation in the mind of all the stakeholders associated with it (Smidts, Pruyn & van Riel, 2001). It refers to a judgement on value about an organisation and evolves over a period of time due to consistent performance (Gray & Balmer, 1998). The various reputations between stakeholders are linked; for example, the reputation of an organisation in the mind of the employee in the service industry has a direct impact on the concept of corporate reputation in the mind of the customer (Hillenbrand & Money, 2007).

1.7. ASSUMPTIONS

- Respondents will have the information required to reflect normal perspectives and experiences.
- Respondents understand that corporate brands have a value attached to them.
- Published research is factually accurate and trustworthy.
- No new research exists that could refute the published academic research on the topic.
- Brands are not static and their value can change based on their reputation and other factors.

1.8. AN INTRODUCTION TO TSOGO SUN

This report uses Tsogo Sun as a single case study to answer the research questions. Tsogo Sun is a leading hotel and casino group that predominantly operates in Southern Africa, but with some presence in the rest of Africa, the Seychelles and the United Arab Emirates. The brand portfolio comprises of 14 casinos and 96 hotels, 6 movie theatres and over 200 restaurants. The hotel portfolio comprises 15 owned brands and 1 managed brand, Intercontinental. The hotel brand architecture spans from budget to ultra luxury (7 stars) and in most cases the casinos are located in prime positions in the areas in which they operate, making them the local hub in terms of entertainment. The restaurants and movie theatres are all located within the hotel and or casino complexes.

Tsogo Sun is a relatively new market-facing brand and has been developed to function as a corporate brand bringing together all the product brands in the portfolio. Prior to the launch of Tsogo Sun in 2012, the casino division operated under the trade name Tsogo Sun Gaming. Each casino was marketed as a brand on its own. The hotel group, known as Southern Sun, communicated the individual brands in the portfolio with all the brands except for the luxury brands strongly endorsed by the group brand, Southern Sun. For example: Garden Court by Southern Sun. The owned restaurants were not marketed as brands at all and the movies were only acquired post the launch of Tsogo Sun in 2014.

With the aforementioned merger and on the back of the acquisition of Gold Reef Resorts comprising 7 additional casinos and hotels in 2011 and listing of the group, it was decided to actively market the group under one name - Tsogo Sun. Tsogo Sun had strong associations within the business world in which the casinos operated and had a positive reputation in the current South African landscape as opposed to Southern Sun Hotels which, in some cases,

conjured up memories of holidays that were exclusively for the white privileged population. A small study however showed that the symbol of Southern Sun hotels, known as the sunburst, had mostly positive associations, particularly in the area of heritage and trust and this was kept.

Figure 1 - Tsogo Sun sunburst

In the new Tsogo Sun brand portfolio every single brand's logo included the sunburst as a way of endorsement, with the exception of Maia, the ultra luxury Seychelles property – Refer to Appendix F. The size of the sunburst in the logo varied according to what the business believed the value of the endorsement to the brand would be. For example, luxury hotels such as Beverly Hills and Sandton Sun's logos had a very small sunburst whereas the economy brand, StayEasy's logo comprised a prominent sunburst. A secondary level of endorsement was introduced to further entrench each product brand's relationship to the corporate brand. The line: *Another Tsogo Sun Experience* was added to all external communication collateral, thus supporting the organisation's brand promise of creating great experiences for its guests.

The rationale for the application of the sunburst, as well as the endorsement line, was that the brand portfolio was so vast and that this would eliminate or at the very least minimise confusion. The potential confusion was compounded by the fact that there was another player in the casino and hotel space, known as Sun International. Both companies carry the word *Sun* in both the company name and the products in their portfolios.

The strategy of building the corporate brand was further supported the philosophy that each brand in some way or another supporting the group's brand values. This meant that, despite each brand in the portfolio having a unique corporate identity, they should, to a lesser or greater extent, contribute to the growth of the corporate brand. This was built into the respective brands' strategy, The Brand Key – which serves as a blueprint for branding decisions.

Tsogo Sun's new brand strategy supported the group's business strategy which was to position the group, Tsogo Sun, first and foremost. The brand strategy made provision for the fact that some brands in the portfolio required individual brand building and marketing efforts. These, for example, included the casinos as well as the luxury brands.

The brand building strategy for Tsogo Sun was built predominantly by proactively seeking opportunities to sponsor sporting and entertainment events in an effort to build the corporate brand. Although it has been quite successful there are a couple of branding decisions that need to be made quite urgently which include:

- How much resources in terms of time, money and manpower should be spent building the product brands in the portfolio?
- When and how will the brand architecture become clear to all the stakeholders?
- How, and to what extent, can the corporate brand values be transferred to the product brands?
- Is the brand portfolio optimally managed?
- How does the organisation deal with the fact that there are multiple corporate brands in the portfolio as a result of the merger and the historical brand strategy?
- How are the product brands affected by the corporate brand's reputation?

- Is the application of the sunburst symbol and the endorsement line across the portfolio sufficient endorsement?

New developments and acquisitions seem to support the business model of being a leader in the area of entertainment. Going forward the group will continue to seek opportunities of growth in this space and therefore the corporate brand strategy should be clear and entrenched in order for it to be geared for growth as highlighted in the Tsogo Sun integrated annual report under Appendix H.

2. LITERATURE REVIEW

2.1. INTRODUCTION

The literature review will convey the knowledge and ideas gained throughout the research process. It will identify the key themes that are relevant to the study; the first being the role of corporate branding within an organisation, specifically when an organisation has multiple brands and how best to manage the portfolio, and the second being around the organisation of the brand management function and the importance thereof for the successful implementation of a corporate brand strategy.

Balmer (2001b) identified five characteristics of corporate brands. Corporate brands need to have cultural roots and can include company or national cultural references. They are intricate in the sense that they affect multiple stakeholders across more than one channel of communication. Corporate brands are tangible, which refers to the fact they affect or are affected by service or product quality, location, logos and symbols etc. Another characteristic a brand needs to have in order to be classified as a corporate brand is that it needs to be ethereal. This refers to the way in which the brand becomes a part of a lifestyle – this also includes stakeholder brand associations. The last corporate brand characteristic is that it requires commitment across the organisation and therefore sufficient resources need to be allocated to support the corporate brand.

The review aims to motivate the research topic by sharing current literature on the key themes using Balmer's (2001b) characteristics as a reference and by highlighting the current

research's strengths and weaknesses; describing each key concept and identifying the boundaries of the intended research.

2.2. CORPORATE BRANDING IN PRACTICE

Corporate branding is a holistic brand management approach which organisations adopt in an effort to craft a differentiated corporate identity (Abratt & Kleyn, 2012). With the emergence of corporate branding as a business concept, many companies are realising that what they have in fact previously perceived as product brands offering goods and services to customers, are in fact evolving into corporate brands with multiple stakeholders. Corporate brands need to be managed differently to product brands (Balmer, 2008).

The associations and images stakeholders have of an organisation are known as its corporate brand (Abratt & Kleyn, 2012; Hatch & Schultz, 2001), and these associations have been formed in the minds of all the various stakeholders over a period of time. Corporate brands, as opposed to product brands, usually have richer heritage associations. These associations allow stakeholders to create imagery of the organisation. They are deep rooted and very difficult to change, but, if positive, can be very powerful (Aaker, 2004b). Companies should strive to manage their corporate brand, as studies have shown that a strong corporate brand impacts the business in many ways, including the bottom line (Abratt, 1989).

A corporate brand can only be managed once it is understood exactly what it is and what factors contribute to it. Identifying these factors and understanding their influence will allow for more effective management of the corporate brand.

2.3. CORPORATE BRAND INFLUENCERS

Various key academics have identified elements that comprise the corporate brand, most notably, Balmer (2008), Harris and De Chernatony (2001) and Hatch and Schultz (2001). All of these are underpinned by what appears to be three common elements which refer to values, promises and behaviours.

Although the literature itself is not definitive, there does seem to be agreement on certain elements that comprise the corporate brand as defined by Balmer (2008) (Abratt & Kleyn, 2012; Dacin & Brown, 2002; Harris & De Chernatony, 2001; Souiden, Kassim & Hong, 2006). Balmer's model will be used as the framework to understand what comprises corporate branding (Balmer, 2008). They are corporate identity, corporate communication, corporate marketing and corporate reputation. In terms of associations within an organisation, Aaker (2004b) highlights components that comprise associations with the corporate brand. These include heritage, assets and capabilities, people, values and priorities, local versus global orientation, citizenship as well as corporate performance and size. Dacin and Brown (2002) support the concept of definition and associations of the corporate brand by referring to the two central concepts as corporate identity and corporate associations.

2.4. CORPORATE IDENTITY

Corporate identity can be defined as an organisation's strategic choices and the way in which it expresses these choices. The strategic choices of an organisation include the company mission, vision, values and culture, their ethos and aims, as well as the way in which strategy is formulated and implemented. The expression thereof reveals itself through the company's visual identity, the promise it makes to its customers, the brand personality and the way in which the brand is communicated (Abratt & Kleyn, 2012; Van Riel & Balmer, 1997).

Corporate identity is central to an organisation's marketing strategy (Bick, Jacobson & Abratt, 2003). It is more than a logo or visual depiction of the organisation, although it does include these. The role of symbols associated with the corporate identity has also grown from being a reference to organisational visibility to a communicator of corporate culture (Balmer, 1995). Symbols, logos and other corporate identity images contribute to the corporate brand as customers have formed emotional connections to them over a period of time. Their thoughts and feelings towards an organisation's corporate brand are heavily influenced by their perception of these symbols and logos (Aaker, 2004a). Organisations with a strong corporate brand identity are able to attract and orientate the right audiences and stakeholders as a result of the recognisable values and symbols that differentiate the organisation (Hatch & Schultz, 2003).

Sometimes corporate identity does not translate in the way it was intended by management to the desired audience and this can affect the corporate brand. For example, employees are integral to the corporate identity and they need to know that they are brand ambassadors first and foremost. Due to the integral role of employees in the management of the corporate brand, corporate branding relies on consistent messaging about the brand's identity in order to result in a coherent delivery across all the stakeholder groups, internally and externally (Abratt, 1989).

Frameworks abound; most recently the Corporate Brand Identity Matrix (Urde, 2013), which will be discussed briefly in this section. According to this framework, the brand promise or core values are central to the corporate brand with mission, vision, culture and competencies flowing from it to the internal stakeholders; expression and personality touching both the internal and external stakeholders and lastly influencing the external value proposition,

relationships with external stakeholders as well as the organisation's position in the market (Urde, 2013).

Corporate identity is deep rooted in the organisation and brand values are derived from the corporate identity, which in turn affects and influences all the organisation's stakeholders (Abratt & Kleyn, 2012; Balmer, 2012; Melewar & Jenkins, 2002; Urde, 2013).

Despite the literature there still seems to be no clear answer as to how managers in an organisation can build their corporate identity or make and manage decisions around corporate identity. It is also not clear to what extent the employee brand influences the corporate brand, although, it is known that it does (Balmer, (2014). What is clear, however, is that corporate identity strongly supports corporate brand management and it is therefore an important concept when working towards understanding the factors that comprise and influence the corporate brand (Balmer, 2012).

2.5. CORPORATE COMMUNICATION

What organisations communicate to all the stakeholders about the corporate brand is known as corporate communication (Balmer, 2012). When an organisation's corporate communication is brand driven, it results in a consistent and coherent brand image in the mind of all the stakeholders. In order to do so successfully, all employees need to fully understand the organisation's core values (Malmelin & Hakala, 2009).

Effective corporate communication happens when the brand becomes central in the organisation's communication. The brand gives direction in terms of choice of channels used

for communicating, the approach to strategy implementation as well as what the overall objectives of communication are (Malmelin & Hakala, 2009).

Within the realm of a corporate brand portfolio, corporate communication or corporate messages can impact stakeholder images pertaining to more than one brand. This could result in confusion pertaining to the individual brands in the portfolio (Biehal & Sheinin, 2007). In order to avoid this confusion, corporate communication should be managed, and organisations need to plan to communicate their corporate brand through marketing initiatives that could increase perceptions around the clarity of the brand portfolio, making product brand communication easier (Muzellec & Lambkin, 2009).

2.6. CORPORATE MARKETING

Corporate marketing is a "philosophy and culture" that is applied across the organisation, considering all stakeholders wants and needs, including the customer and the employee, as well as its role and responsibility in greater society. Its focus is on the organisation as a whole, which refers to the corporate brand and the corporate identity (Balmer, 2012).
Corporate marketing encompasses corporate communication and transcends the traditional marketing approach (Balmer, 2001a).

Corporate marketing can assist in communicating an organisation's core values. Core values refer to an organisation's approach to leadership, strategy, its organisation, the development of products and services and the way in which it communicates (Urde, 2003). An example of an organisation's corporate marketing strategy, drawing on its core values, in practice would include its approach to social investment programmes. Successful corporate marketing of the tenets of an organisation's core values will have a positive impact on reputation. This holistic

approach has lead many organisations to reconsider the way in which they market their organisation as well as their organisation's products and services (Van Riel, 1992).

Corporate marketing acknowledges the value of the role of employees as brand ambassadors and it also understands the importance of organisational culture (Balmer, 2001a). Tarnovskaya, Elg & Burt (2008) offer Ikea as an example of a strong corporate brand with a strong organisational culture underpinning its corporate marketing approach. With its corporate strategy based on its vision and brand values, thereby creating a powerful corporate identity, it is effectively geared towards consistent corporate marketing, both nationally and globally.

2.7. CORPORATE REPUTATION

Corporate branding has been described as the prompts in an effort to create a good reputation (Maathuis & van Bruggen, 1998). Corporate reputation can be defined as "the attributed values" evoked from a person's perception of the corporate image, with corporate image being the "global evaluation a person has about an organisation" (Dowling, 2001; p.17). Corporate reputation also refers to the way in which brands collectively portray their past actions and outputs, and highlights the brand's ability to deliver what it promises to all stakeholders (Fombrun & Rindova, 1996).

A strong corporate brand relies heavily on reputation. Managing corporate reputation is only possible when stakeholder perceptions are known (Balmer, 1995). The effective management of an organisation's internal resources, bearing these perceptions in mind, should result in a favourable corporate reputation (Harris & De Chernatony, 2001). According to Bendixen and Abratt (2007), corporate reputation management relies on two basic principles of corporate

identity, ethical standards and candid relationships, reiterating the fact that concepts of corporate branding do not stand alone and are not finite – they evolve, are linked and interrelated.

Corporate reputation is shaped by narratives surrounding the brand. This guides consumer decision making and contributes to the brand value of the organisation. Reputation affects the way in which an organisation operates. Whilst valuable, it also makes it vulnerable when considering the speed of innovation and change, particularly when considering the pace and all encompassing space in which the media operate (Malmelin & Hakala, 2009).

Employees, as internal stakeholders, are expected to live the brand and deliver on the brand promise. They need to understand that they are a strategic component of the organisation and play an important part in building the brand's reputation as they are ultimately the organisation's brand ambassadors (Dacin & Brown, 2002; Hatch & Schultz, 2008; Hemsley, 1998). Employees are the interface between the internal and external organisation and therefore have a big influence over the consumer and other stakeholder's perception of the organisation as well as the actual brand (Balmer & Wilkinson, 1991; Schneider & Bowen, 1985).

In building the corporate brand, communication to employees is just as important as messages sent to customers and other external stakeholders (Devasagayam, Buff, Aurand & Judson, 2010). It is therefore important to ensure alignment between the employee brand and the corporate brand. This includes communication to both existing and potential employees (Hatch & Schultz, 2008).

Aaker (2004b) states that employees in organisations with a heavy emphasis on service are the basis for the corporate brand image. All employees need to understand the brand image

and be aligned to it in order to deliver the brand promise (Mangold & Miles, 2007). Some organisations have managed, through employees; to differentiate their brands through either recruiting specific personality types or by creating a culture of citizenship and belonging (Hatch & Schultz, 2008).

Hillenbrand and Money (2007) suggest a causal relationship between corporate reputation and corporate responsibility. Corporate responsibility or good citizenship is consumed with creating an environment where the organisation is respected and admired, both internally and externally. It is closely linked to an organisation's values. Citizenship in practice reveals itself through an organisation's environmental policies and social and community initiatives (Aaker, 2004b).

Organisations that do well financially show strength and vitality which assists in building company credibility (Roberts & Dowling, 2002). An organisation's size as well as its scope often signifies competence and longevity. This instils trust in all stakeholders. It also could increase an organisation's ability to extend into new areas (De Ruyter & Wetzels, 2000).

According to Kay (1993), corporate reputation is one of four capabilities that organisations can possess in order to give them a competitive advantage. This is possible due to the fact that corporate reputations have value, are rare and cannot be imitated or substituted (Eisenhardt & Martin, 2000).

Organisations create the impression through marketing initiatives that they have certain abilities and expertise. If leveraged well, the organisation can become known for a specific ability (Aaker, 2004b). Communicating this specific component of the corporate brand well can positively impact the corporate brand. Great service is an example of an organisation's

ability or expertise. When receiving great service, customers are satisfied. Customer satisfaction is a result of a positive engagement between an organisation, albeit it through its products and services and a customer's expectations (Churchill & Surprenant, 1982). Customer satisfaction has a direct positive influence on the corporate brand thus affecting the corporate reputation (Anisimova, 2013).

First research question

Question 1:

What comprises the corporate brand in an organisation with multiple corporate brands?

2.8. STRUCTURING THE CORPORATE BRAND

When considering how best to structure a brand portfolio, the strength of the parent brand, the size of the brand portfolio as well as the level of attribute compatibility needs to be considered (Liu & Hu, 2011).

2.9. CORPORATE BRAND STRATEGY

The move to branding an organisation as opposed to only its products is, in part, a result of shortening lifecycles of products within the organisation. This, together with the insight that communicating to all stakeholders as opposed to only the consumer, has benefits to both the business and the bottom line (Hatch & Schultz, 2009).

Corporate brand strategy can be defined as an organisations effort to offer a distinct and differentiated identity and a unique positioning for the products and/or services that it offers. It strives to work towards a situation where the product offered and organisation as a whole

creates value for its stakeholders beyond that offered by its competitors (Ind, 1997; Muylle, Dawar & Rangarajan, 2012; So, Parsons & Yap, 2013).

Organisations predominantly follow one of two types of corporate branding strategies; one of uniformity, where the corporate brand and the other brands in the organisation are all positioned and profiled or the variety model where each brand is different to the corporate brand (Van Riel & Bruggen, 2002). However the reality is that organisations often apply a combination of brand strategies in practice depending on the situation (Rao, Agrawal, & Dahlhoff, 2004). The fact remains that organisations are interested in defining the relationships between the various business units or brands in an attempt to manage them better (Chailan, 2009). At the same time those organisations that comprise multiple business units and decide to follow a corporate branding strategy need to ensure that they understand that the role of the corporate brand is to ultimately support business unit communication (Shahri, 2011).

A corporate brand strategy exists in an attempt to create a monolithic brand name that ultimately represents all the products and services that an organisation has to offer when communicating to stakeholders (Xie & Boggs, 2006).

Deciding on how much emphasis each of the brands in the corporate brand portfolio requires now becomes important. Muzellec and Lambkin (2009) offer three ways in which the corporate brand portfolio can be classified:

- Trade Brand – the corporate brand is not actively promoted but is merely an umbrella housing a collection of independent brands
- Business Brand – the corporate brand is not actively visible to customers on the package of the product, but is a strong brand for specific targeted stakeholders
- Holistic Brand – the organisation and the products share the same name

In practice, the above theory of corporate branding strategy does become slightly more complicated and organisations seem unable to apply a single brand strategy across their portfolio (Mann & Kaur, 2013), particularly with the added impact of costs related to building and maintaining separate brands and the fast rate of innovation (Morgan & Rego, 2009; Strebinger, 2014). Strebinger (2014; p.1794) suggests a more relaxed approach to applying corporate brand strategy in practice and refers to it as a "matrix of branding similarities" in the brand portfolio as opposed to a strategy that is strictly and consistently executed.

The coexistence of multiple brands in whichever way within one organisation manifests itself in two ways, firstly through the brand architecture and secondly through the brand portfolio (Chailan, 2009). Organisations that follow a corporate branding strategy therefore need to carefully consider every business decision they make. This includes the way in which they manage their brand architecture (Shahri, 2011).

2.10. CORPORATE BRANDING ARCHITECTURE

De Chernatony (2012) defines a brand as a collection of emotional and functional values that assists organisations to make a promise to its stakeholders regarding a unique and welcoming experience.

With the increasing academic conversation around treating organisations like brands, it has become imperative for organisations to approach an organisation's architecture from a brand perspective (Argenti & Druckenmiller, 2004). It is of strategic importance that organisations

seek to build and maintain brands that are strong and positively perceived by their respective audiences (Shahri, 2011).

Brand architecture can be defined as an organisation's approach in terms of the organisation, management and marketing of their brands and can be referred to as the external image of the organisation's business strategy (Petromilli, Morrison & Million, 2002). It defines the way in which a product or service has been categorised and whether or not it is done independently of the other brands in the portfolio (Rao *et al.,* 2004).

Brand architecture is sometimes inherited and sometimes created, but the recent increase in the number of corporate rebrands due to mergers and acquisitions has re-emphasised the importance of brand architecture management.

Whatever the case might be in a particular organisation, the fact remains that doing so assists organisations in graphically depicting their often complex collection of brands in order to provide a snapshot of the organisation's brand structure (Muzellec & Lambkin, 2009). Doing this can help organisations to better assess and prioritise what needs to be done with each respective brand which can result in direct positive results in their bottom line.

It would therefore be useful for organisations to dedicate resources to the management of the brand architecture by ensuring that brands are positioned correctly in the hierarchy of the framework of the architecture and that all brands are relevant (Petromilli, *et al*., 2002; Varadarajan, DeFanti & Busch, 2006). Recent focus on brand architecture has resulted in more definitions and strategies in terms of brand architecture.

The various types of architecture include the traditional approaches by Kapferer (2002), Laforet and Saunders (1999) and Olins, (1978) but also the more recent classifications by Aaker and Joachimsthaler (2000) as well as Strebinger (2014). Despite the introduction of

new types of brand architecture, the reality is that many organisations still draw on more than one approach in practice (Chailan, 2009). The various approaches are depicted in Table 1.

Table 1 - Different approaches of brand architecture

Kapferer (1991)	Laforêt and Saunders (1994)	Keller (1998)	Aaker and Jachimsthaler (2000)	Riezebos (2003)	Strebinger (2004)
Umbrella brand Same brand for several products in different markets	*Corporate dominant* Corporate brands Corporate name used (Heinz)	*Corporate or company brand level* (DuPont)	*Branded house – different identities* (Levis' Europe, Levis' US) *Branded house – same identity* (BMW, Virgin	*Monolithic brand name* One brand name in different product classes	*C-branding* A uniform brand for all the product categories and target groups
Brand-origin The product brand exists, but pays a small role	*House dominant* Corporate brands Subsidiary's name used (Pedigree, Fisher-Price)		*Subbrands co-drivers* (Gillette Mach3, Sony Trinitron) *Subbrands – master brand as a driver* (HP Deskjet)		*E-branding* Brand family strategy: hierarchically brand names have a common endorser
Endorsed brand Widespread brand, diversified products and positioning	*Mixed brand – dual brands* Two or more names given equal prominence (Rowntree Quality Street) *Mixed brand – endorsed brands* Brand name dominates but is endorsed by corporate or house identity (Scotch)	*Family brand* Applied on different product categories (Beatrice Foods)	*Endorsed brands – token endorsement* (Universal Picture, a Sony company)	*Dualithic brand name* Two brand names for the same article/product-line extension or endorsement	
Range-brand Products are all linked by one concept and one unique principle			*Endorsed brands – linked name* (McMuffin, Nestea) *Endorsed brand – strong endorsement* (Courtyard by Marriott)		*T-branding* Each of the targets have a separate brand name
Line-brand Same name for several complementary products	*Brand dominant – mono brands* Single name used (P&G, Mars)	*Modifier brand* To specify the reference (Johnnie Walker Red Label)	*House of brands – shadow endorsement* (Tide/P&G, Lexus/Toyota)	*Multilithic/serries brands* (Nestea, Nescafé, Nesquick)	*P-branding* Each product has its own brand name
Product-brand One name, one product, one positioning	*Brand dominant – furtive brands* Single brand name used and corporate identity undisclosed (Van der Bergh)	*Individual brand* Applied to a product category	*House of brands – not connected* (Saturn, Nutrasweet)	*Multilithic brand names* Different brand names and logos	*PT-branding* Product and target group specific brand strategy

Source: Chailan (2009)

Within the corporate brand architecture, the corporate brand should be the strongest and therefore have the most brand equity (Hatch & Schultz, 2003; Ind, 1997). The corporate brand's reputation should influence customer perceptions about the services of the product brands within the corporate brand portfolio. In return, what customers feel about the product brands will have an impact on the corporate brand (Chun & Davies, 2006).

In practice this premise is often forgotten as the other brands in the organisation, particularly the product brands that deal directly with the consumer, become the day to day focus (Kapferer, 2002; Uggla, 2006). Knowing that the corporate brands should be central to all brand architecture decisions in a corporate brand strategy and managing them accordingly will allow organisations to see opportunities across the entire brand spectrum. These can then be managed more effectively with the actual brand architecture becoming a great source of power. Of particular interest in this literature review is the way in which corporate brand architecture can support a strategy to endorse brands in the organisation; for example the way in which the Marriott hotel group extended its brand architecture by endorsing new categories of hotels (Aaker, 2004b).

Deciding on the appropriate brand architecture for an organisation is important as this will determine the degree of synergy between the product brands and the corporate brand (Varadarajan *et al*., 2006). Muzellec and Lambkin's (2006) model depicts brand architecture management visually. It is hardly ever a choice between a branded house and a house of brands strategy, but a combination of both. It is in this vertical dimension that organisations can manage the degree of image transfer between brands in the brand architecture.

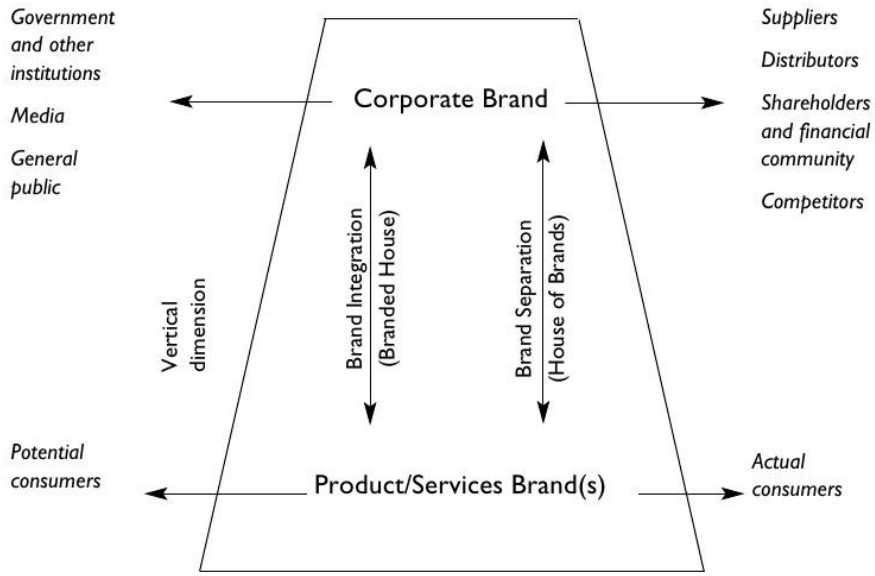

Figure 2 - A dynamic model of brand architecture management

Source: Muzellec and Lambkin, 2009

2.11. BRAND PORTFOLIO STRATEGY

Brand portfolio management as an expression of corporate strategy and effective management must start by understanding the equity of each brand and its contribution to the organisation's business strategy which in turn will result in organisational profitability (Pierce & Moukanas, 2002).

A brand portfolio goes beyond brand architecture by looking at ways in which the brands coexist as well as the balance between each brand. It is not merely the "aggregation of brands" (Chailan, 2008; p.259). Brand portfolio strategy refers to the number of brands that an organisation owns and promotes, including their respective markets; the degree to which its brands compete with each other and the customer perceptions about the brands pertaining to price and quality (Aaker, 2004a; Morgan & Rego, 2009).

Organisations are becoming more interested in defining the relationships between the brands in the brand architecture in an attempt to manage them better (Chailan, 2009). This is supported by the fact that individual brands in the portfolio become stronger when they are interconnected (Pierce & Moukanas, 2002). Brand portfolio management involves organisations having a strategy for every brand which includes each brand's vision and clearly defined role (Keller, 1998), and allows organisations to determine which brands need to be repositioned and which are underperforming (Carlotti, Coe & Perrey, 2004).

Deciding which brand/s to use in their marketing strategy is central to the key strategy of many organisations (Cravens, Piercy & Prentice, 2000; He & Balmer, 2006). Sometimes organisations choose to communicate using the corporate brand only in an effort to save costs, as building a single corporate brand is cheaper and easier than managing the exposure of a portfolio of brands (Melawar & Walker, 2003; Morgan & Rego, 2009). This approach could be powerful, but is also risky in the sense that it exposes the organisation to major risks as one problem could affect the entire organisation negatively. This has resulted in many organisations choosing to decrease the risks associated with the above by following a multi-brand strategy which requires careful management of the brand portfolio (Chailan, 2009). Research does, however, show that during an economic downturn effective brand portfolio management results in organisations deciding to dedicate resources to a smaller number of powerful brands (Pierce & Moukanas, 2002).

Uggla (2006) developed a corporate brand association base model which aimed to provide insight into the various types of relationships that existed between the corporate brand and the other brands within an organisation that comprises multiple brands. The management thereof could be referred to as brand portfolio management as it goes beyond the hierarchical

positioning of the brands in the architecture, referring more to the way in which brands coexist as well as the balance between each brand in the organisation (Chailan, 2009).

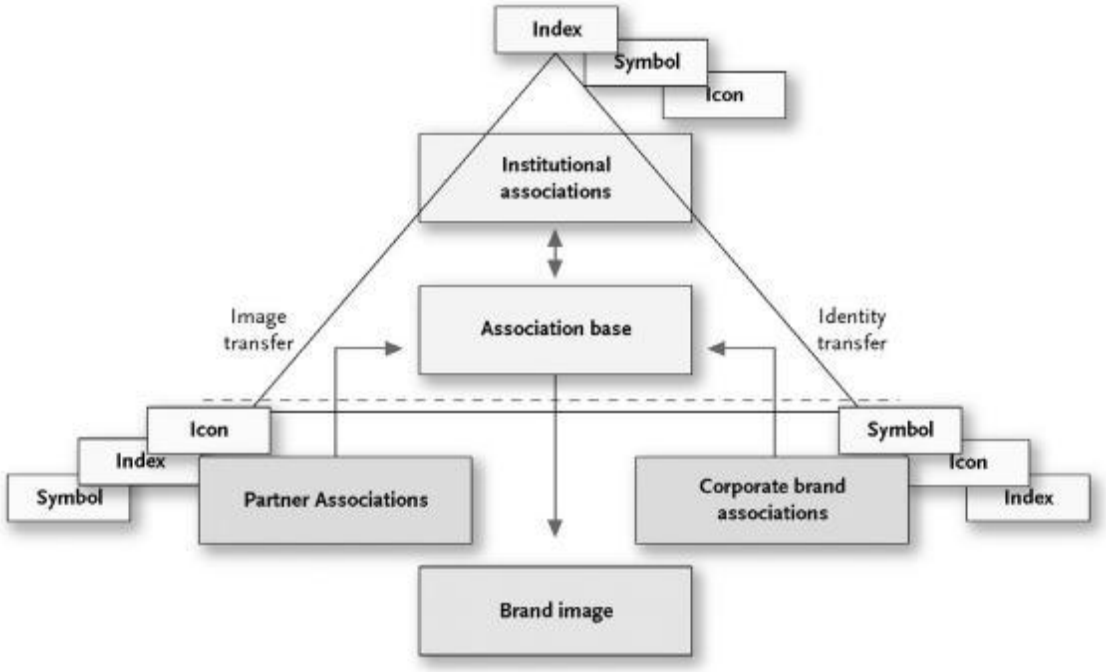

Figure 3 - Corporate brand association base model ***Source: Uggla (2006)***

Effective brand portfolio management entrenches decisions around branding in every part of the organisation. As an example, product brands serve to create distinct business units whilst a focus on the corporate brand minimises costs and complexity (Figure 3). Finding the right portfolio mix depends on the uniqueness of the business design in the brand portfolio, the organisations ability to manage multiple brands and the organisations appetite to fund and support a portfolio of brands (Pierce & Moukanas, 2002).

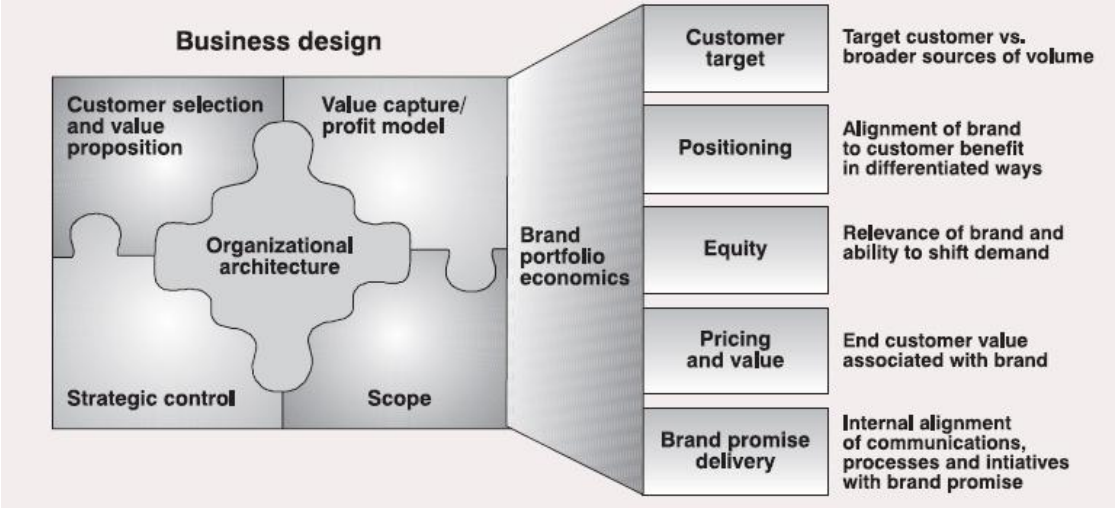

Figure 4 - Aligning brands with business designs Source: Pierce & Moukanas (2002)

Effective management of the brand portfolio could assist in better organisation of the relationships between brands. It can assist in decision making; for example in identifying how many brands should be available to customers from the same product category or whether or not the brand can stretch to a certain extent. Brand portfolio management can also manage gaps that have been identified in the brand architecture to allow organisations to become more competitive (Chailan, 2009).

Applying a corporate brand strategy that involves the careful management of the brand architecture in an effort to ensure that the corporate brand remains the strongest, and the brand portfolio with the aim of increasing attribute compatibility, involves the organisation's focus on the brands as a whole, instead of that of the individual brands (Chailan, 2009; Kumar, 2003; Muylle *et al*. 2012). This can be achieved if organisations adopt a customer perspective in order to try to understand which brands they perceive to be a part of the brand portfolio; what the links are, if any, between the brands in the portfolio and whether they transfer value between the brands, positively or negatively. The process of answering these

questions requires a dedicated focus on brand portfolio management and could result in changes in brand architecture (Petromilli *et al*., 2002). This dynamic process of applying a corporate brand strategy in practice can ultimately result in contributing to establishing an organisation's sustainable competitive advantage (Chailan, 2008).

Second research question

Question 2:

What is a corporate brand portfolio and what is the best way to structure it?

2.12. MANAGING THE CORPORATE BRAND

It is very difficult to define exactly where the corporate brand starts and ends in an organisation. The reasons for this vary, but include the fact that the corporate brand's role is flexible (Aaker, 2004b). This flexibility becomes even more evident when the theory is applied in practice (Strebinger, 2014) as shown in the above section of the literature review.

Brands are more important for their associations with company core values than with graphic design elements (Kotler, 2003). For this reason, brands are no longer a function of only the marketing department. Corporate brands provide insight into "key features" of an organisation (Balmer, 2008; p.22). The corporate brand can be leveraged to positively impact performance and therefore it can be regarded as a strategic asset. In order for this to happen, all stakeholders of the organisation need to share consistent perceptions of the "nature of the brand" (Harris & De Chernatony, 2001; p.442). This involves the careful management of all the brand components, starting from the vision and including the translation of brand values. This becomes tricky in organisations with multiple brands and it is unclear to what extent

employees need to adopt the values of the brand in which they operate and how much influence the corporate brand should have. This area of lack of clarity needs to be addressed as, despite the fact that a corporate brand strategy could be beneficial, the lack of management thereof could negatively impact both the organisation's product and corporate brands (Shahri, 2011).

2.13. THE CORPORATE BRAND MANAGEMENT FUNCTION IN AN ORGANISATION

The corporate brand is potentially a powerful source of brand equity and therefore it should be managed correctly (Hatch & Schultz, 2003; Ind, 1997).

The product brand is focused on the customer (Muniz & O'Guinn, 2001) and the corporate brand's focus includes more stakeholders (Balmer, 2005). Historically marketing has been responsible for communicating the product brand to the market and the corporate brand has relied on corporate communications (Balmer, 2008). Despite this academic distinction, it is still very difficult to determine exactly where the corporate brand starts and the product brand stops (Shahri, 2011). There are a number of factors that contribute to this lack of clarity and these include the fact that some product brands are operating in the realm of corporate brands; as well as the uncertainty around whether or not brand image can be transferred from the corporate brand to the product brand and vice versa (Muzellec & Lambkin, 2009). With this in mind, organisations have to start thinking differently about the corporate brand management function as they are very often not able to see opportunities across the organisation. This could be due to the fact that they are not positioned to do so, or that management have not understood the strategic value of managing the corporate brand. The

reality is that corporate brands often have very little support in practice, in terms of both physical and financial resources (Uggla, 2006).

In order for a corporate branding strategy to be effective it needs to be managed. Ownership and management of the corporate brand involves a clear understanding of the organisation's core values, which includes the organisation's business strategy "with the aim to develop the brand as a resource" in order to hold a position of "strategic competitive advantage" (Urde, 2003; p.2012). An organisation's commitment to build the corporate brand, as identified by Balmer (2001b) is important, as companies need to prepare for the allocation of resources and funds in order to grow and support the corporate brand. According to Balmer (2012; p.1068) building the corporate brand requires the corporate brand manager to carefully consider the corporate marketing mix. This mix refers to:

- "Character (corporate identity)
- Communication (corporate communication)
- Constituencies (stakeholder orientation)
- Covenant (corporate brand)
- Conceptualisation (corporate image)
- Culture (corporate culture)"

Balmer & Greyser (2003) acknowledge the broader sphere of corporate branding and the contributions from multiple management disciplines, but state that they believe marketing has the strongest claim in the area of corporate branding. Although the corporate brand management function is a function of marketing, this does not mean that marketing owns the corporate brand. All employees are brand ambassadors and important sources of corporate brand building (Balmer & Wilkinson, 1991). According to Balmer (2001a), the corporate brand is driven by the CEO. He offers the example of a CEO who claimed that it was not

possible to have a solid corporate brand in the absence of a clear business strategy. This CEO stated that the corporate brand was underpinned by "values which match strategy and which are expressed in performance" (Balmer & Greyser, 2003; p.250). This view is supported by Shahri (2011) who stated that the CEO had an integral role to play in the ultimate management of the corporate brand.

Considering the above, the corporate brand management function becomes an important strategic role preoccupied with maximising opportunities within the corporate brand architecture by managing the corporate brand portfolio (Uggla, 2006). This requires the corporate brand manager to look at the management of brands holistically and to have access to the organisation's brand identity. Brand identity involves the engagement of all employees, including management, in an effort to find ways of making the brand unique. This includes dialogue and collaboration in terms of defining the brands values (Harris & De Chernatony, 2001). The aim of these efforts is to ultimately align internal and external stakeholders in order for communication and brand delivery to be consistent across the entire organisation (Hatch & Schultz, 2009).

2.14. THE ROLE AND INFLUENCE OF THE CORPORATE BRAND MANAGER

The question is often asked how to structure the organisation to support the corporate brand and where the management of the corporate brand function should be located (Hatch & Schultz, 2009). Most of the literature (Harris & De Chernatony, 2001; Hatch & Schultz, 2009; Uggla, 2006) supports the fact that the day to day management of the corporate brand happens as a function of marketing but that it requires access to the overall business strategy, which, in turn, requires close relationships with many key individuals across the organisation.

A key role of the corporate brand manager is to actively manage the brand portfolio. As product markets constantly evolve, it is the corporate brand manager's responsibility to seek opportunities and make recommendations in terms of changes, additions or reductions of brands (Aaker & Joachimstahler, 2000). Having a strong corporate brand strategy with a visible corporate brand will make the brand portfolio management process less painful (Aaker, 2004a). This process also requires the corporate brand manager to have good relationships with internal stakeholders. This role requires clear and consistent communication to the various teams operating centrally, as well as in the other brands in the portfolio in an effort to close the gap between actual brand identity and intended brand identity (Harris & de Chernatony, 2001; Mitchell, 1997). The ongoing process in search of congruency in an effort to build a coherent intended brand identity is imperative to good external communication and therefore core to the role of the corporate brand manager as it has a direct impact on the organisation's corporate reputation (Abratt, 1989).

Third & fourth research questions

Question 3:

Who owns the corporate brand management function and what is the scope of decision making?

Question 4:

Which identity gaps must the corporate brand management process close and how do organisations identify what needs to be done?

2.15. CONCLUSION

The first section of the literature review aimed to discuss the problem around what exactly the corporate brand comprised of in order to understand what influenced the corporate brand and how it in turn influenced the organisation and its stakeholders. The reason for this was that without knowing exactly what it is made up of and how people relate to it makes it very difficult to manage. The literature offered information in so far as answering the question for scenarios where an organisation only has one corporate brand. This was useful, but not sufficient as it could be deducted that companies that comprise multiple corporate brands would not have the resources or the inclination to manage each corporate brand in their portfolio strategically, particularly within organisations that have multiple business units. This led to question 1.

The next step in the literature review journey was to consider corporate brand strategy and what underpinned it. This involved discussions around brand architecture and brand portfolio management in organisations comprising of multiple brands. Again the literature was adequate in terms of answering the questions pertaining to an organisation with one corporate brand; however it fell short when considering organisations comprising of more than one brand. With the knowledge that a corporate branding strategy often led to cost savings in terms of marketing efforts and a positive impact on the bottom line, it made sense to want to understand how this principle could be applied to organisations with multiple corporate brands. This led to the generation of question 2.

Questions 3 and 4 arose when trying to understand the role of the corporate brand manager in these organisations. The literature seemed to support marketing's role in managing the corporate brand, however, due to the strategic level at which the corporate brand operated; it

appeared to be primarily an organisational function rather than a marketing role. The CEO and the business strategy would be drivers of the corporate brand. How this applied to companies with multiple corporate brands now needed to be understood.

By answering the four carefully crafted research questions, the study aimed to clearly define what the corporate brand encompasses, the best way to structure it in an organisation comprising multiple corporate brands and ultimately how the corporate brand management function should be organised.

Question 1: What comprises the corporate brand in an organisation with multiple brands?

Question 2: What is a corporate brand portfolio and what is the best way to structure it?

Question 3: Who owns the corporate brand management function and what is the scope of decision making?

Question 4: What identity gaps must the corporate brand management process close and how do organisations identify what needs to be done?

From the literature review it appears that organisations that apply a corporate branding strategy in practice often deviate from the actual theory that exists. This is sometimes deliberately done due to the theory not considering all scenarios as in, for example, organisations that comprise multiple corporate brands in the portfolio. It is also sometimes due to a lack of strategic focus by the respective organisation. Organisations with multiple corporate brands in their portfolio currently do not have a framework in which to operate and make decisions. It is unclear what the process is that needs to be followed in a portfolio

comprising more than one corporate brand, due to a merger or acquisition or historical lack of focus on brands, to adopting a corporate brand strategy with only one dominant corporate brand in the portfolio. This has led to the conclusion that there is a need to develop a set of guidelines in order to assist these types of organisations to better manage their brand portfolio.

3. RESEARCH METHODOLOGY

3.1. INTRODUCTION

This section will explain the research methodology used to gain insight and understanding of corporate branding and corporate brand management within an organisation comprising of multiple brands. It will firstly provide a framework for the methodology and offer rationale for the decision to follow an inductive approach to the research. The second part of this section will consider the appropriate research design followed thirdly by the population and sample. Lastly the research instrument used for data collection and analysis will be discussed and motivated followed by the identification of limitations and a discussion around the validity and reliability of the chosen methodology.

3.1. THE RESEARCH METHODOLOGY

The methodology most appropriate for answering the research questions is a qualitative single case study. This study, through a discussion guide supported by broad research questions, aims to provide a framework or a set of guidelines to assist organisations with multiple brands to manage their corporate brand portfolio more effectively. This was done in order to answer the research questions that came about as a result of the literature review as comprehensively as possible.

Qualitative analysis

Qualitative research is characterised by its goal, which is to understand some aspect of social life. It uses words rather than numbers as data that needs to be analysed (Patton, 2002).

A qualitative methodology is appropriate in this set of research as the questions that need answering cannot be answered quantitatively as they require insights into people experiences and opinions (Boyce & Neale, 2006). The sample to be researched is quite small but knowledgeable, again supporting a qualitative approach.

During the interview process, it was imperative that events were viewed through the eyes of the people that were being studied (Bryman, 2012). The information gathered was subjective in nature and therefore meaning became very important, making the way in which interview answers were captured critical as the information gathered during the interviews has ultimately lead to the formulation of a new theory/framework (Creswell, 2009).

3.2. THE RESEARCH DESIGN

The literature review process revealed the best approach in terms of research design. It highlighted potential research areas and provided a context for the research – rather than standing alone, it could be clearly identified within other studies (Yin, 2011). When considering the concepts of this study and the intention of creating a useful framework for organisations to manage their corporate brand portfolio more effectively, this research design seemed most appropriate.

A series of in-depth qualitative or unstructured interviews served as the most appropriate research design. By definition this type of design is not strictly scripted – there is no formal questionnaire with a list of questions that need to be posed to the participant and the open ended questions are deemed most important as they reflect the participants feelings and opinions in his or her own words. Each setting was different and the researcher's demeanour had to be adapted to suit the participant in order to create a conversational mode. This

required the researcher to be present and practice active listening in order to understand meaning (Yin, 2011).

The benefit of the chosen research design was that it would allow for the solution to the research problem and close the research gap. This was mainly due to the fact that the sample size of eligible participants, based on knowledge and influence, was quite small making lengthy in-depth discussions more valuable. The answers given were long and detailed and the respondents could be constantly probed to fully answer the research questions (Bryman, 2012).

The study of human behaviour through face-to-face interviews, and combined with the extensive literature review, resulted in a generation of a theory of actions, interactions or processes through interrelated categories of information based on data collected (Bryman, 2012). Notes were taken during and post each interview (Appendix E).

In some ways qualitative, unstructured interviews are more difficult than structured interviews as the interviewer is required to participate in the process, adjust conversations, lead and probe whereas structured interviews are more prescriptive and require less involvement from the interviewer (Yin, 2011).

In order to ensure credibility of the research design, the principles of theoretical sampling and inductive coding needed to be adhered to (Bryman, 2012). This will be considered again under sections 3.3 and 3.4.

3.3. POPULATION AND SAMPLE

Population

This single case study considered all organisations with multiple corporate brands in their portfolio. Tsogo Sun, an organisation within the South African hospitality landscape, was chosen as a case. The decision was based on a number of factors:

- First and foremost the fact that it offered strong, established corporate brands across multiple leisure categories including hotels, casinos, theatres, restaurants and movies.

- Gaining entry to the field was relatively easy due to the existence of long-time, established relationships with senior management, which led to trust and mutual respect between the interviewer and interviewee (Yin, 2011).

- The target population comprised of senior management of Tsogo Sun who have knowledge and influence and who make decisions. The identified population could be considered experts, as their views and decisions directly impact the area of corporate branding within the organisation.

The targeted stakeholders were:

- Key group directors
- Influential brand custodians

Participants had to comply with the following criteria:

- Be a senior member of Tsogo Sun management
- Be typical to their environment
- Have good work experience – more than five years in the space

- Reside in Johannesburg

The research was conducted with the co-operation of Tsogo Sun. The company was not a sponsor of the research; however they created an opportunity to access suitable participants which proved useful during the actual data collection phase – See Appendix B.

Sample and sampling method

In order for the research to be as meaningful and relevant as possible ten purposefully selected, knowledgeable and "information rich" (Arora & Stoner, 2009: p.273) participants were targeted to conduct in-depth interviews with via a generic purposive sampling method using typical cases. Generic and typical purposive sampling suited this study, as the researcher was able to establish the criteria concerning the type of participants needed to address the research questions (Creswell, 2009; Patton, 2002). It has also proven to be the most effective approach when studying a certain cultural domain, such as that of an organisation (Tongco, 2007).

Experts are unclear and divided on minimum sample size for in-depth interviews conducted in qualitative research (Gerson & Horowitz, 2002; Guest, Bunce & Johnson, 2006; Warren, 2002). Although there are no clear answers on the exact size of a sample for this kind of study, it can be derived that sample sizes are typically small in qualitative work, particularly due to the intensity and depth of each participant's involvement (Patton, 2002).

An initial sample size of ten participants therefore seemed appropriate. This was supported by the facts that only a limited number of people were equipped to answer the questions posed; it comprised more than 80% of the eligible participants that could be considered for

interviewing; it took place at one site and the interviews were very intensive (Bryman, 2012). Interviewing continued until saturation was reached.

Senior management in organisations with "multi-business firms" such as Tsogo Sun, which consist of varied businesses and who operate at a corporate level, are responsible for strategic decisions that span the entire organisation. One of these strategic areas involves corporate branding decisions (Shahri, 2011). The ideal sample therefore consisted of representation, as identified in the population, with interviews as follows:

Table 2 - Participant sample

DESCRIPTION OF SAMPLE TYPE	NUMBER INTERVIEWED
CEO	1
Key Group Directors:	
Chief Financial Officer **Chief Operations Officer** **Chief Legal Officer and Treasury** **Group Human Resources Director** **Group Marketing Director** **Managing Director of Gaming**	6
Influential Brand Custodians – senior management	
Group Director of Development **Group Corporate Affairs Manager** **Group Training Manager**	3
TOTAL	10

3.4. THE RESEARCH INSTRUMENT

The literature review formed the basis of the development of a discussion document that formed the primary instrument for the in-depth interviews.

Qualitative instrument: in-depth interview discussion guide

As a good level of trust existed between the two parties (interviewee and interviewer) qualitative interviews or in-depth, unstructured interviews using a discussion guide, was deemed the most appropriate instrument. It was a time consuming approach, but the data gathered proved that this was the most useful. To alleviate errors pertaining to notes taken during interviews, as well as the time taken to type and transcribe interviews and to allow for full engagement between interviewer and interviewee, the interviews were audio taped. This was done with each interviewee's written permission (Yin, 2011), and copies of each participant's signed consent are included under Appendix D.

Interviews are defined as a qualitative approach of collecting data through another person's explanation of a behaviour or recollection of an action (Yin, 2011). To assist with ensuring that the interviews were as productive as possible, an interview protocol was developed. This improved consistency, which in turn improved the reliability of the findings. The interview protocol included how to communicate when inviting participants to the interview, how to start the interview, including advising the participant that the interview was confidential, what to say when concluding the interview and what to do immediately after each interview (Boyce & Neale, 2006). This protocol was adhered to during each interview conducted and proved to be useful.

The raw data obtained from the interviews gave comprehensive answers to the discussion guide questions and prompts, based on knowledge and experience. This was supported by a combination of field notes, DVDs and other relevant marketing material.

Table 3 - Research instrument required in order to answer the research questions

QUESTION NO	RESEARCH QUESTIONS	RESEARCH INSTRUMENT
1	What comprises the corporate brand in an organisation with multiple corporate brands?	Discussion document with open-ended questions and probes (see Appendix C), academic articles, company documents
2	What is a corporate brand portfolio and what is the best way to structure it?	Discussion document with open-ended questions and probes (see Appendix C), academic articles, company documents
3	Who owns the corporate brand management function and what is the scope of decision making?	Discussion document with open-ended questions and probes (see Appendix C), academic articles, company documents
4	What identity gaps must the corporate brand management process close and how do organisations identify what needs to be done?	Discussion document with open-ended questions and probes (see Appendix C), academic articles, company documents

The open-ended nature of the questions posed in the discussion document allowed for exactly that – discussion. It made provision for the exploration of meaning and laddering. It also allowed for the perspective in order to see the world through the participant's eyes without being restricted by the rigid boundaries set out by a formal questionnaire (Yin, 2011). The discussion guide, although flexible, ultimately provided sufficient structure to the interview.

3.5. PROCEDURE FOR DATA COLLECTION

In order to achieve the desired results in this study using in-depth interviews, getting to know who the right people were to interview was more important than the actual gathering of data. This does not mean that data collection was not important - it was vital, but collecting the right kind of quality data is what drove this process (Bryman, 2012). This section details the exact procedure that was followed for the collection of data.

Data collection started with the literature review, which included relevant academic journal articles, published books on the topic of corporate branding and company reports.

Throughout the process, key phrases and important themes were highlighted to refer back to, and to note different points of view on a particular point. The literature review served as a basis for the preparation of the discussion document.

The CEO of Tsogo Sun approved the research, see Appendix B, after receiving a written request outlying:

- The purpose of research
- The description of research design
- Resources requested
- Responses to potential objections/concerns
- Clear description of the researcher's role, responsibility and obligation

The site chosen was Tsogo Sun Head Office. This was due to the fact that the CEO and all the directors are based there and it therefore allowed them to be interviewed in their own environment, which led to a higher level of comfort by the participants which resulted in a higher level of engagement.

The participants were contacted via email. Each email was personalised, firstly giving a context to the study and thereafter explaining why their input was important. It offered guidance in terms of when it would be best to schedule - first thing in the morning or last thing in the afternoon - and the recommended time set aside for the interview. The consent document signed by the CEO accompanied each email (see appendix B). All the identified stakeholders accepted the request for an interview. The roles of the respondents have been shared to indicate the level of seniority and their influence, as per the participant sample in Table 2, however careful attention was taken to not link a particular respondents' role with

the respondents' view in an effort to manage confidentiality. Most respondents were however comfortable wavering anonymity.

All participants assisted in answering all four of the research questions. These pertained to the research problem around the role and factors that contribute to decisions that impacted the corporate brand; provided insight into the brand architecture, identity elements and their relationships with each other and how all of these factors influenced the organisation.

The timing of the interviews was an important consideration and was carefully planned to ensure that each person being interviewed could add as much value to the data collection phase as possible (Strauss & Corbin, 2008). In order to ensure engaged participation, the interviews were set up for either early in the morning or late afternoon. An interview protocol that preceded the discussion guide (see Appendix C) was developed to serve as a basis in which all ten interviews would take place (Creswell, 2009).

Prioritisation of the order of interviews was also important. The first couple of interviews were the longest and most intensive and did in fact produce the most data. They were scheduled with the most influential/information-rich participants. In all the interviews the participants were guided by the same discussion sheet and subsequent interviews became shorter due to constant comparison (Jones & Alony, 2011).

Interview preparation process allowed for a systematic interview approach. The discussion guide contained carefully formulated, broad questions in order to ensure that the four research questions posed were answered. It also assisted in reproducing the same scenario for other interviews. The interview questions were pre-tested to contribute to their validity (Patton, 2002). The questions were open-ended to allow for significant prompting. Notes were made

on body language (see Appendix E) and a voice recorder was used to record the verbal conversation (Jones & Alony, 2011). The audio taped interviews were professionally transcribed by an independent 3rd party recommended by the business school soon after all the interviews had taken place.

Following this, the under-mentioned procedure was followed and repeated for each interview, at all times keeping the data in context:

- Attention to ensuring a rapport with the participant by dressing appropriately, arriving on time, guaranteeing confidentiality and creating a feeling of trust (Patton, 2002).

- Each interview took place in the respective participant's office – a space where he/she felt comfortable (Patton, 2002). The exception to this was the CEO's interview which was done in an allocated meeting room at Sandton Sun due to his busy schedule.

- The participants had already given prior permission for the interview to be audio taped and in that way, any feelings of anxiety were alleviated prior to commencing the interview.

- The first discussion point was very broad in order to encourage conversation in order to set the tone for the interview and to allow the participant to know that his/her account was important.
- Each of the discussion points became the basis for the development of a new concept and each concept was tested and retested until it eventually earned its way into the theory (Corbin & Strauss, 1990).

- In order to be consistent in the collection of data, every observation during the interview was considered as potentially being a concept (Corbin & Strauss, 1990).

- At the end of the interview, each recording was transcribed and kept readily available in order to contribute to validity and to refer to in order to validate that the interview had been captured correctly (Boyce & Neale, 2006).

3.6. DATA ANALYSIS AND INTERPRETATION

This research followed a thematic approach to analysis. This refers to the process of looking across all the data and identifying whether common issues re-occured, identifying main themes and summarising all the views collected (Patton, 2002).

There are typically five steps commonly used in qualitative data analysis. Below is a listing, followed by a detailed description of each step:

- Documenting and transcribing the data as well as the process followed to collect it.
- Categorising the data into concepts
- Connecting the data to show how one concept could influence the other
- Evaluating alternative explanations or deviant cases thereby legitimising the data
- Reporting the findings (Schutt, 2011).

The first step in data analysis and interpretation started with coding. This assisted in breaking down the raw data into manageable data that could be compared and analysed. Coding refers to identifying anchors that allow for key points of data to be gathered (Bryman, 2012). In order to ensure that the coding process was accurate, a framework of categories and sub-categories was determined consisting of key words and phrases that would assist in

answering each of the research questions (Patton, 2011). At this stage it was also useful to look out for relevant direct quotes from respondents which could provide credibility to the information (Boyce & Neale, 2006).

Coding was followed by concepts - a collection of codes that had similar content that allowed for the data to be grouped. A narrative was used to discuss the linkages between the categories that could result in identifying relationships in the data and potentially answering the research questions (Creswell, 2009).

In terms of data management it was important to keep the information in context. This was done by continuously reiterating the area of expertise of the interviewee, whose particular area of expertise or interest could result in more focus on a particular discussion point.

The next step included inter-relating the categories around core phenomenon in order to draw a descriptive framework as seen in the tables and figures extracted from the software programme Nvivo where all the source information was captured and which helped portray the process. This ultimately resulted in the generation of a theory which will serve as an explanation or guideline for the end user (Bryman, 2012).

As mentioned above, coding was done using NVivo software, a qualitative programme supported by Bryman (2012). Although the coding was not done manually the researcher was still responsible for interpreting, coding and retrieving the data and, by using Nvivo, the level of accuracy was improved.

3.7. LIMITATIONS OF THE STUDY

Limitations refer to potential shortcomings of the research that were not controllable (Simon, 2011). Qualitative methodologies are by their nature subjective. During the research phase the researcher was constantly monitoring participant involvement and it can be noted that all participants matched the stipulated criteria as laid down in the population and sample section and participated fully. Due to the actual interview process modelling the theoretical approach, interview bias could also be eliminated as a limitation.

3.8. VALIDITY AND RELIABILITY

In order for the research to contribute to knowledge, it needed to be valid, reliable and avoid post-publication critique (Blodgett, Bakir and Rose, 2008). Validity tests ensured that the research measured what it intended to measure (Bryman, 2012).

Validity and reliability are interrelated as the one presumes the other. Validity presumes reliability and therefore if a measure is not reliable, it cannot be valid (Bryman, 2012).

The next sections 3.8.1 to 3.8.3 describe the measures taken to strengthen the validity and reliability of this piece of research in detail.

External validity

Measurement validity refers to whether a measure of a concept that has been developed to measure a concept does just that (Bryman, 2012). For example: Did the interview do what it was intended to do which was to provide useful data that could assist in answering the

research questions and formulating a theory? In essence, external validity ensures the quality of the study.

In order for the interviews to have been valid, it needed to ask questions that would evoke discussion that would result in honest answers. The types of questions asked and the phrasing of questions assisted with achieving measurement validity. In order to ensure this validity, the discussion guide was sent to the researcher's supervisor prior to commencing the actual research phase. Changes were made based on constructive feedback, and in that way validity was ensured. External validity was also strengthened by ensuring accuracy of the findings. This was done by sharing the overall findings with the participants interviewed and requesting their feedback (Yin, 2011). All participants commented that they were not opposed to any of the findings.

It is difficult to generalise purposive sampling and this should be noted as a weakness in terms of external validity; however the data gathered from the sample interviewed is richer and more meaningful. Triangulation has however assisted in minimising this weakness. Triangulation refers to the deliberate seeking of evidence from a variety of sources and comparing the findings with each other (Patton, 2002).

It was also important to look for deviant findings - findings that did not correspond with the conclusions arrived at. In one or two cases this did in fact occur and the reasons for these deviances have been explained and, in that way, strengthened validity (Patton, 2002). See interview with respondent five commenting on the strength of the Tsogo Sun symbol, referred to as the sunburst (Appendix F). All participants agreed that the sunburst had in fact assisted with merging and strengthening corporate culture and that there was a deep meaning

to the sunburst that stakeholders can draw on. Respondent five disagreed and stated that it was merely a graphic device.

Lastly, external validity is strengthened through ongoing research over a period of time. Due to the time constraints involved in completing this piece of research, it should also be acknowledged as a potential weakness in terms of external validity (Bryman, 2012).

Internal validity

In order for the study to be internally validated, it needed to be clear that there were no other explanations for the findings. This included considering bias (Bryman, 2012). Interviewer bias was minimised by firstly creating a framework for interviews and secondly by audio taping the interviews. It was also important to ensure that the research instrument, in this case the discussion guide, was thorough and accurate to furthermore strengthen internal validity. This could be solidified by pre-testing the research instrument (Yin, 2011) and this was in fact done.

It was, however, very difficult to reproduce in-depth interviews and therefore validity was confined to the verification of the data though constant reoccurrence of a concept in the data (Corbin & Strauss, 1990). Furthermore, all the steps in the data collection phase were documented and supported by relevant resources and backups such as audio taped interviews, transcriptions, notes taken during the interviews and access to researcher's Nvivo site.

As the research will be submitted to the research committee for approval, the findings will be interrogated and will serve as a final step in terms of internal validation.

Reliability

Reliability refers to the degree in which the research instrument used provided stable and consistent results (Bryman, 2012). In order for the instrument to be reliable, it was important to ensure that the interview questions were clear, non-composite and relevant. This was presented to the researcher's supervisor for input prior to the commencement of the research phase. The interviews needed to ultimately provide answers to the research questions and therefore the discussion guide needed to be comprehensive and exhaustive. There could also be no gaps in the data after the research had been completed (Patton, 2002).

After data collection, the transcription process needed to be accurate to ensure that no coding errors had occurred. This was done by cross referencing the transcripts against the typed transcribed material and comparing raw data with codes (Patton, 2002).

In order for a qualitative piece of research to be reliable, the results need to be a representation of the entire sample population interviewed, consistent over time and have the ability to be reproduced when using an alternative, similar research design (Joppe, 2000).

To ensure reliability of the data analysis, records needed to be kept of all interviews, documents and transcripts (Patton, 2002). These are submitted as a part of this piece of research and can be found under the respective appendices at the back of the report.

4. PRESENTATION OF RESULTS

4.1. INTRODUCTION

The results are presented using direct quotations from respondents, graphs and figures and extracts from source documents for triangulation purposes. A total of ten interviews were conducted using the following criteria:

- Be a senior member of Tsogo Sun management
- Be typical to their environment
- Have a holistic view of the business
- Be an influencer
- Have good work experience – more than five years in the space
- Reside in Johannesburg

Table 2 - Demographic profile, role and work experience of participants

RESPONDENT	SEX	ROLE	AGE GROUP	EXPERIENCE
Respondent One	Female	Influencer	40-45	20 years (broken service)
Respondent Two	Male	Group Director	40-45	20 years
Respondent Three	Male	Group Director	50-55	11 years
Respondent Four	Male	Group Director	55-60	32 years
Respondent Five	Female	Influencer	40-45	6 years
Respondent Six	Male	Group Director	40-45	11 years
Respondent Seven	Female	Group Director	40-45	14 years
Respondent Eight	Male	Group Director	55-60	31 years
Respondent Nine	Male	Group Director	40-45	8 years
Respondent Ten	Male	Influences	50-55	13 years
TOTAL YEARS EXPERIENCE				166 years

The discussion guide used as represented in Appendix B illustrates the questions posed relative to the four research questions. A review of the transcribed interviews showed a number of key themes that will be discussed in the next chapter. Even though the discussion guide intended to allow for the interviews to address all the research questions, the flow of the discussions did not follow the order of the research questions, but were rather guided by the interviewee. It was also not possible to allocate an interview question/s to a research question, as in many cases one discussion addressed areas that covered more than one research question.

4.2. PRACTITIONER PERCEPTIONS OF THE CORPORATE BRAND

Key themes were identified when extracting the interview data from respondents' transcribed interviews that addressed research question 1.

The main themes were:

- Access to the corporate brand
- Corporate brand as employment brand
- Corporate brand definitions
- Corporate identity
- Corporate brand reputation
- Corporate brand stakeholders
- Corporate citizenship
- Corporate culture
- Corporate marketing
- Guest experiences
- Impact of a merger on a corporate brand

The most discussed key themes, as visualised in Figure 5 were corporate identity and corporate brand reputation.

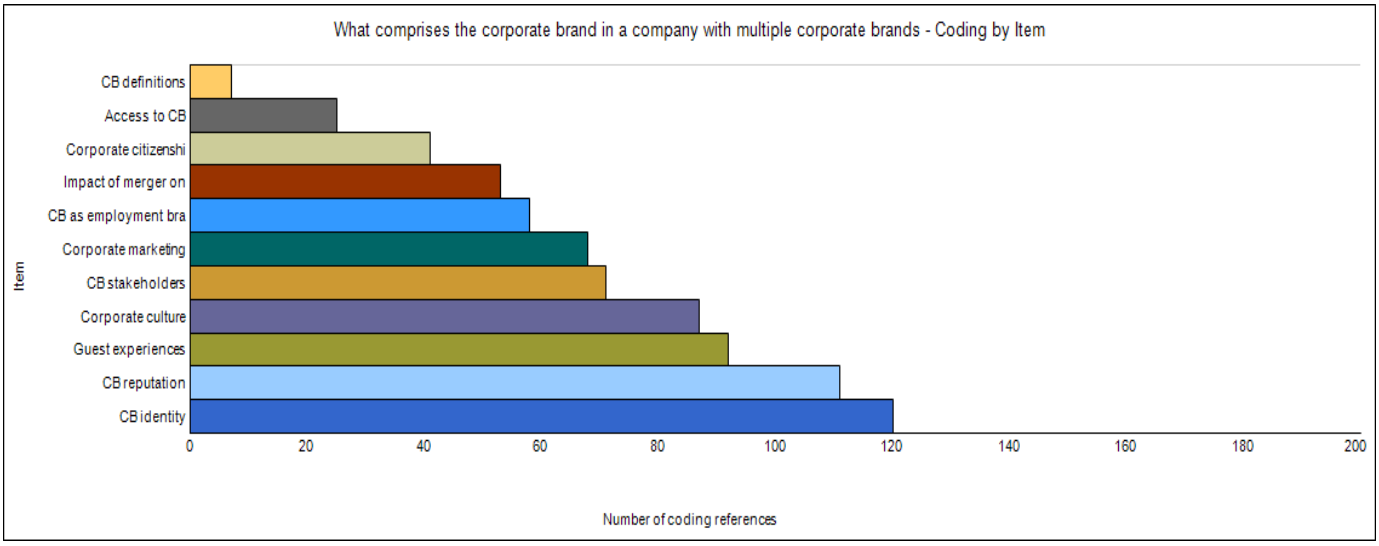

Figure 5 - Themed nodes according to contribution to Question 1 from all sources

Each respondent participated adequately by contributing to answering the question as depicted below:

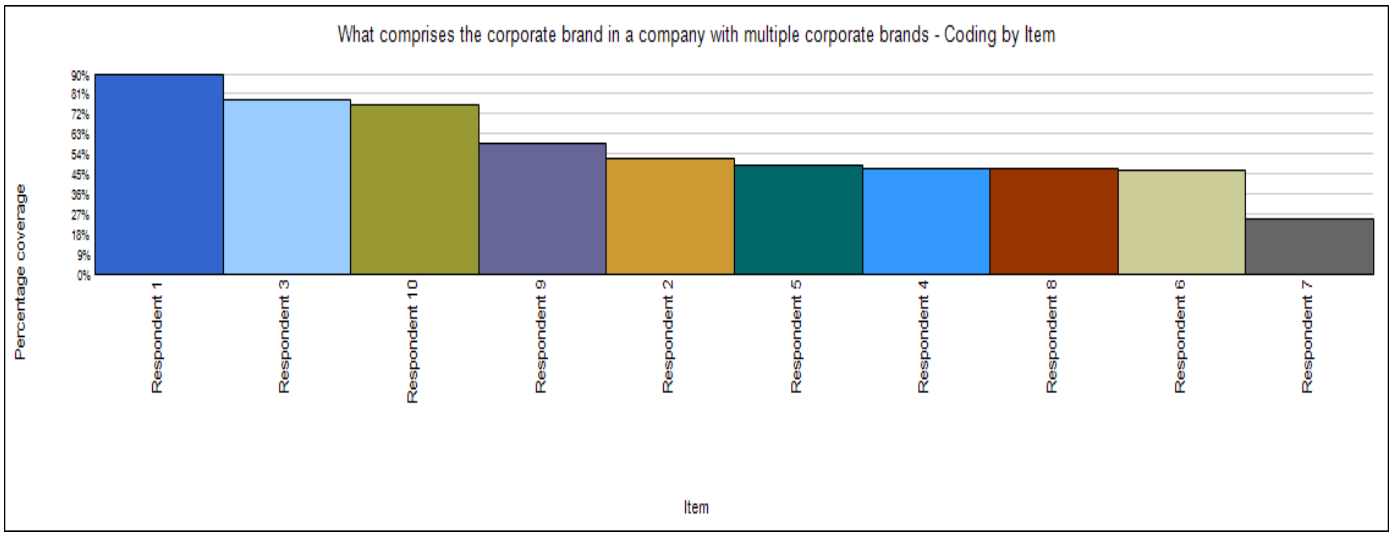

Figure 6- Input from all sources according to their contribution to Question 1

Question 1:

What comprises the corporate brand in an organisation with multiple corporate brands?

Table 5 – Access to corporate brand via the product brand

RESPONDENT VIEWS
"...in our company, you have to have to go to Montecasino... to stay at SunSquare Montecasino. Nowhere in that, am I saying Tsogo Sun. Is it necessary to say it?"
"...you had Montecasino, as an individual master brand, you had SunCoast Hemingways...with nothing to link them, no master brand like Tsogo Sun...Then with the coming into being the master brand Tsogo Sun, what we did was to put this Sunburst as part of the branding of each property … and I think the benefit to us from that is, that people now know what to expect when they get to that casino … this is part of the Tsogo Sun group, this is what I am going to get here."
"My gut says it confuses the consumer … at least we've got the sunburst which flows through everything, so that when you are a Garden Court customer, you still would have the sunburst on there. It's not building the Garden Court brand, what does the Garden Court brand stand for, what does the daisy in the brand stand for … there is not a lot of that."
"I think although we've done quite a lot of work in trying to bring it all together with Tsogo Sun, but if you go and speak to an employee in Montecasino, they'll tell you that they work at Montecasino...it is not there yet, you still want people that work in a Garden Court to be passionate about the brand …"
"One thing I need to add to is the Tsogo Sun halo effect, if casino advertising is banned, it is going to be a very, very valuable thing that we've done, but I think it is quite specific to our business, and it might impact on our research, where a strategic reason why we need to be able to advertise Tsogo Sun which people will link to the casinos … which you might not have in another industry…"
"I think Montecasino as a brand has always been very strong, and SunCoast in Durban has been a very strong brand, although I must say I think the other units have each got their own brand identity to a … lot bigger extent now than in the past. If you look at Silverstar and Golf Reef City, even Golden Horse, there is much more of an individual branding also linked into the master brand."

Summary of results pertaining to access to the corporate brand via the product brand

The above quotations referred to the way in which stakeholders were exposed to the corporate brand via the product brands. Before the rebranding of the organisation from Southern Sun Hotels and Tsogo Sun Gaming to Tsogo Sun, most stakeholders were only exposed to the product brands. It seemed that perceptions about the product brand hugely influenced the stakeholder's perception of the corporate brand.

One respondent cautioned against the current corporate brand approach which is to build the corporate brand, Tsogo Sun, first and foremost. This respondent believed this was being done to the detriment of the product brands, considering the fact that customers mostly accessed Tsogo Sun via the product brands (hotels, casinos, restaurants and movies).

Another respondent referred to the potential ban on casino advertising in the future, thereby justifying the company strategy of actively building the corporate brand. Most of the above comments made reference to the fact that the larger, more established brands in the portfolio did not necessarily directly benefit from the relationship with the corporate brand; however, were in agreement that the smaller, newer and lesser known brands definitely did.

Table 6 – Corporate brand as employment brand

RESPONDENT VIEWS
"So from a corporate branding perspective then, it is one way of having everybody aligned and subscribed to the values and principles of the business …"
"...and do even the stakeholders like the internal stakeholders realize that they also need to fit in with certain needs that the company has, in order to deliver consistent service throughout the group..."
"So I wanted to achieve two things, I wanted the market, as in the consumer of our product and our shareholders, to

understand what the group consisted of, because nobody believed the scale and the variety, et cetera, and I wanted the people internally to understand who they worked for, and they didn't work for a unit … or a business division, I had to break all those barriers down. And the way to do that the simplest, was to make sure everybody had exactly the same business card. Now how do you do that when you have multiple brands all over the place? And the unifying thing that we said is the most valuable is the sunburst."

"If you lose the corporate integrity then people won't trust the integrity at the casino, or even as an employee, because now … 'do I trust you as my employer, you know, when you've lost your integrity' … I think that is very important at corporate level."

"I think by and large we have developed a people set, where there is a … where there is a DNA within the people that work for Tsogo that is beginning to permeate, even more strongly. I think it needs a bit of definition, not to be academic, but we need to understand that we keep that value set."

"...and I think if the corporate brand … makes sense … if it makes sense externally to the public, depending on which way you look at this … it is going to make sense internally…and if the staff get it, it is going to start marking sense to the public as well."

"I think pride is something that you find when you watch the rugby or anything like that, and you watch the TV and you see the Tsogo Sun coming up there, you do feel proud, because I work for that company. I think staff now feel that … and also now with livingTsogo, the branding goes through everything, even in all the HR things, so … So I think there certainly is a big amount of pride in that..."

"In the past they were very sort-of individualistic, so you worked for Garden Route Casino, and that is where you worked, I mean that was it. You weren't part of a group really. That very little interaction between the units … and I think now you find a lot of that people, you know … you won't find somebody saying I work for Emnotweni, you say I work for Tsogo Sun at Emnotweni … So I think that has been very good overall."

"...and the one thing I said that, from a corporate point of view, which is crucially important is integrity. If you lose the corporate integrity then people won't trust the integrity at the casino, or even as an employee, because now … 'do I trust you as my employer, you know, when you've lost your integrity' … I think that is very important at corporate level."

"...to go back to people, I mean we do have our own livingTsogo value set, which drives us as employees, but I think you need to say, what part of our value set are customer value set … is corporate, okay … and what part of our value set do we then … add onto the way we deal with the customer in each particular brand …"

"...we need to look at how we dress people, because how you are dressed determines how you act …the way we dress, and the way we let people look, actually starts to almost be our face …the next brand journey for us is work on people, that is what it is. It is how we start … to react to people…"

"So before my time, there was this campaign that was run by … Southern Sun Hotels: *You've Arrived* … I still remember it, it touched me, and I think it is one of those campaigns that will be forever embedded in my mind...it talked to me, I saw it and I was like 'wow' … You know it was one of those things that made me want to work for the company. But what also reinforced, for me, the liking of the brand was the fact that, it wasn't only the message that we were pushing out to the customer, but it was also doing inside, to make sure that our people deliver on that promise we make to the customer."

"Right now, I don't know what we are doing inside to make sure that they deliver on the Tsogo Sun experience … Nobody is looking at, if you are saying the Tsogo Sun is about delivering great experiences, what are these great experiences, either by brand, or generally?"

"...when it came to Southern Sun Hotels brand, we had the hallmarks, so we said, this is the promise we make outside, these are the things that are going to help us deliver on the promise that we make outside, these are the things that our teams, our people have to do, to make sure that we deliver, and this is what we are going to do to empower and up-skill to make sure …. You know right now there isn't, I'll be honest with you, in my head right now, Tsogo Sun is just a logo …"

"Look, I think it is managed in a way to unify people, it is managed in a way to make people have a sense of pride … it has managed to bring the group together, and that is also … because we operate as hotels and gaming."

"...internally we know what we stand for, and internally we know what Tsogo Sun stands for."

"(New employees are) induct(ed) into Tsogo, they get inducted to the company, and in their career they will move between brands and so on … Underneath that there is their function, and they tend to know what their function is, so if you are being inducted as a rooms division manager in a Garden Court Mhlanga, you pretty much know what your job is, otherwise you are the wrong person anyway. It is far more important you understand the company, and where that environment sits than there is a Garden Court personality that you need to be inducted into, I don't believe that. That you will get on the job, because you'll run the unit the way you are supposed to run the unit."

"...for the other stakeholders we want the Sunburst on Montecasino so that they know, I'm a Tsogo Sun employee

and we own Montecasino..."

"...if you go and speak to an employee in Monte, they'll tell you that they work at Montecasino, and the livingTsogo single value system is incredible important in driving it even further, because you just entrench Tsogo more, but it … it is not there, you still have people that work in a Garden Court to be passionate about the brand …"

"There is a distinct pride, I've been very close as well to living Tsogo engagement … and you see there, results coming out that, we are proud of our industry, as you can understand, and also of the company."

"...see people are working for Tsogo Sun now, there is no doubt about that. I've seen the change from people working at Montecasino … and now they have the pride, and why do they have the pride in my view, because of the power of the variety of what we offer here, and the … the sexiness of those brands."

"...it was always talked about that we would use Tsogo Sun eventually, we just added the sunburst. So I think it is an incredible powerful … symbol. There were some concerns about the meaning, which I was involved in, that it was too close to Southern Sun, and that it would be perceived by staff as being taken over by Southern Sun, and it is just Southern Sun."

"I can tell you that the results of the livingTsogo survey do still show a degree of … lack of working together in hotels and gaming …I think it is going to be there for a while, because they are two different products."

"It was almost like that was the beginning of the journey, from my point of view, because suddenly, you know, as an employee, you sort of identify with your company name, so the company took a decision to deliberately, whether that was right or wrong, keep Tsogo Sun separate from Southern Sun, in every way you can imagine. So from culture to look and feel, to the nature of the way they conducted their HR practices, to how they marketed their business, all this kind of thing, it wasn't seen as needing to have …"

Summary of results regarding corporate brand as employment brand

This section considered comments pertaining to how the corporate brand contributed or changed perceptions around Tsogo Sun as an employment brand. Prior to the merger new employees were inducted into either hotels, casinos or corporate. There was little exposure to what the other divisions were doing; little interaction between divisions and employee growth was also division-bound. This meant less opportunity for growth. The merger brought with it

a common set of internal values, referred to as *livingTsogo*, as referred to in some of the comments above and with it pride, trust and scale. There are definitely still departments working in isolation of each other resulting in a "silo mentality" that exists between gaming and hotels. This is evident in a recent internal survey with employees.

However, according to the comments made by respondents, employees seemed to be starting to feel like they belonged to something bigger and it was evident in the way in which they were slowly shifting from stating that they work for a property, i.e. Montecasino to saying that they worked for Tsogo Sun. The introduction of the corporate brand appeared to be particularly useful among employees working in what would be regarded as a smaller or less significant property, with the references above to Garden Court and The Garden Route Casino.

One respondent raised concerns regarding the introduction of the corporate brand, stating that with the emphasis shifting to the corporate brand, the product brands had become a bit less distinct – referring to the group as "just a logo" and employees within the properties not sure how to deliver the brand experience. In the past each brand had a distinct set of hallmarks which drove behaviour within the properties of the respective product brands. With the introduction of the corporate brand and its external facing brand values, it seemed, according to this particular respondent, that it was unclear where the corporate values stopped and where the product brand's hallmarks started.

Table 7 – Corporate brand definitions

RESPONDENT VIEWS
"I say, think of Tsogo Sun as the surname, and this big family. And then each of the brands are the first name of … always connected by the family name, but you can have children and grand children and … you know … and that is a very simple way of describing it, but for me I like the idea of this … corporate brand being the surname that connects the family of the brands."
"People see the master brand as the intangible thing that is keeping everybody together. So it is showing the corporate responsibility to the assets that we've got, and it is showing the people within that you have a responsibility to the assets that we have."
"...As far as I'm concerned the corporate brand doesn't stop, I think the product brand must be supportive of the corporate brand... but if people say to me, 'Where do you work' and I say 'Tsogo Sun', and then they look at me blankly and I say, 'Montecasino', the immediately know who I'm talking about."
"If the corporate brand is strong enough in the public domain, the product brand needs to just enhance that corporate brand."
"As Tsogo Sun (hotel name), because I don't have any public Tsogo Sun Montecasino hotels, then as a person in the public, I'm not going to make that connection, so it is hard to make that connection, and is it necessary, to make that connection? So I guess the corporate brand automatically seems to stop, when the product you are selling is not called the same as the corporate brand."
"I think what we haven't done is, we haven't done a good enough job of communicating exactly what the brands in our portfolio are, and the only reason we haven't done that, is because … it has been a journey just to position them in itself, during the past two and a half years. Our job now, in my mind … is to go and … make sure that the customer knows what each of things stand for …"
"I think on the hotel side you might find people saying, I'm a Tsogo Sun customer. And sometimes I may stay in a Garden Court, or Southern Sun or StayEasy, but I am a Tsogo Sun customer. Then comes the casino, first and foremost, I am a Montecasino customer. And I think that will always be the case because it is not as though people generally travel to other casinos, you know … when you live in Fourways you are going to come to Montecasino..."

Summary of results around definitions of corporate branding

From the above it is relatively clear that the respondents interviewed had a clear and pretty common understanding of what the corporate brand was. With the organisation having a very deep and varied level of skill, ranging from senior management to contracted unskilled workers, some managers have had to find easy ways of explaining the shift from a product brand environment to a corporate brand strategy to their respective teams internally.

All the respondents seemed to agree that the changes in the brand architecture had added a degree of clarity; however most agreed that a fair amount of communication was still required before current and potential stakeholders fully understood the extent of the portfolio and how the brands fitted together.

On the gaming side, the introduction of the corporate brand was welcomed as an endorsement or as a way of showing size and scale when looking at expansion; however it would appear to have had very little impact on the actual casino customer. As one respondent stated when asked who they work for, Montecasino was easier understood than Tsogo Sun and another respondent stated that guests still referred to themselves as "Montecasino customers".

Table 8 – Corporate identity

RESPONDENT VIEWS
"I think since the new branding exercise and the listing, we've now got a corporate identity, which we simply didn't have in the past … I mean we were a private company, the name Tsogo Sun was not known, the casino names were known to the individual … or the customers in the various areas … The hotel brands... Southern Sun, Garden Courts, StayEasy were, but Tsogo Sun was not a known brand. I think that has come out very strongly now as a corporate brand. "
"I think the power of the symbol being the sunburst has been extremely well represented by being the legacy sort of part of the company, going back without the word 'Southern Sun' or 'Tsogo Sun' just having this picture that people

can identify with."

"Bringing the sunburst across everything … that was the Number 1 thing … if we got something right in the last three years, I think that was it."

"When we acquired Gold Reef Resorts...and had a really good hard look at the situation, and whether it was serving the business, holistically or not, to operate these two separate divisions any more. And through that acquisition of Gold Reef Resorts and the merger and stuff like that, we were forced to take a step back from ourselves and say, how are the public actually in this organization, does anybody realize, for example, that the Sandton Convention Centre is part of this company"

"Ja 'Tsogo' having derived from the Tsogo Investments name and 'Sun' from Southern Sun, that brought the two together, and … over time for the cultures have better simulated and the businesses having better simulated over time, that distinction between Tsogo Sun gaming and Southern Sun as a hotel business has dissipated, largely dissipated."

" … and do even the stakeholders like the internal stakeholders realize that they also need to fit in with certain needs that the company has, in order to deliver consistent service throughout the group, or whatever the case may be. So I think we've only started getting it in the last, probably about two years or so, and I think that we are moving into a space where we are discovering collectively who we are, and it makes so much more sense to work for a company that knows its own identity, that we all understand that we are all connected by this one name, this one company …"

"I see the sunburst as that basic trust factor … and the names that go across the rest are of the more product specific …"

"… if you're employed as an example, at Garden Court Umtata, for instance, and you don't have this connected feeling to something larger than that particular property … you behave in the way that is representative of the Garden Court Umtata, and you may not even behave in a way that is representative of Garden Court, if there are more than one, so you sort of localize your little … environment. So I think that there has been a substantial impact on people …the sort of real feeling of being one company and everyone understanding they are employed ultimately by one organization with one identity, with one set of values, and so on. That certainly the outward facing brand has a huge impact on what the inward, the internal people are experiencing."

"Draw people in through Tsogo, let them trust Tsogo … that's why we've got those brand values, leadership, you know, passion, variety, seductive … we create experiences … throughout our entire business, and then when they get to the hotel, the hotel brand should be their hero … and the dominating thing. It shouldn't contradict Tsogo Sun,

it should built Tsogo Sun subtly, so that by the time they leave …they want to stay at another Tsogo Sun or when they are in a one-horse town, and they see the sunburst …. a hotel that they would never have had in their basket … they would now consider."

"And initially, there was very much a Southern Sun Hotels culture, and then there was a Tsogo Sun Gaming culture, which was difficult to bridge...over time the cultures have better simulated and the businesses having better simulated over time, that distinction between Tsogo Sun gaming and Southern Sun as a hotel business has largely dissipated."

"So, Tsogo Sun has I suppose a corporate name and a trading name and a business name, I think this architecture is very clever and works particularly well, taking the sunburst logo through to everything."

"I think Tsogo Sun has carved out a good space for itself in what is quite a cluttered hotel brand market."

"I think that Sun is losing, has lost its uniqueness, I mean for one you always had the … the confusion with Sun International, now you've got Sun Couriers, African Sun, Sun Media, you know, there is a number of Sun business out there, every day we get trademark queries being sent to us, whether we want to challenge the use of the work 'Sun' … so I don't know if too much brand equity attaches to Sun alone, I think the logo and Tsogo is strong."

"He said he doesn't understand our branding nomenclature, how we associate different names with different products and properties, he says he get terribly confused, he doesn't know what is in the business and not … I think it has largely been cleared up, you just have to look at the names to see that we are part of one and the same group."

"You know what Tsogo Sun and the sunburst businesses deliver, largely. You know that they are not going to deviate to an extreme for offering you very poor product service … and then within that you can then choose your pricing point, where you want to come in..."

"I'm a Tsogo or a Protea or City Lodge kind of guy …. It is not so much loyalty, it is branding thing..."

"I think the brand loyalty and affinity to the sunburst, so if I get to Cape Town, I see the sunburst on the Waterfront, I know I'm going to stay there, because that is the brand I know. So I think that has been very good from that point of view, for the casino customers."

"...bringing them (casinos) all together now under one master brand, which is good from a customer experience point of view, customer expectation, they know what they can expect to get."

"There has been very little interaction between the units … and I think now you find a lot of that people, you know … you won't find somebody saying I work for Emnotweni, you say I work for Tsogo Sun at Emnotweni … So I think that has been very good overall."

"...so it is not just Tsogo Sun 1 or Tsogo Sun 2 and it is from five-star to two-star, nobody knows what they are going to get. So I think it is very good to maintain the customer facing brands, because it is important that the customer knows, this is who I am, and when I get to a Garden Court, this is what I get, when I get to a StayEasy that is what I get."

"Because the customer is saying, Sun International and, Tsogo Sun is the same, they … don't get it. The corporate world, when you look at the analysts and the investors they get it. In time that is what I think is going to happen, we are going to become Tsogo without the Sun, and Sun International will be Sun International, because even when the analysts and the journalists write about us, they write about Tsogo and Sun … So Tsogo is us and Sun is Sun International, so I think in the end Sun will fall away …"

"I think the TV advert has gone a long way to reinforce what it is that we do … but I think a lot of people still just see the sunburst and Tsogo Sun like at rugby and sporting events and say, 'yes I see the name but what do they do?' …. "

"The sunburst has helped consolidate everything that sits under Tsogo Sun, and that for me was a good job done and I'll give that a plus, because now when people talk about Tsogo Sun, and you see the sunburst you sort of know, okay Montecasino is part of Tsogo Sun, Southern Sun Elangeni Maharani is part of Tsogo Sun, but in terms of what is common between Montecasino and Southern Sun Elangeni Maharani I don't know …"

"So we've already done the job of linking all of these, and for me that is where the weakness lies, that the linkage is only to the extent that you've got a sunburst … and nothing more."

"We haven't unpacked the values, how the values impact on all the other brands, what does it mean for each of these product brands, because right now we said to the consumer, it is Tsogo Sun, and this is what Tsogo Sun is...".

"...you almost didn't find a single soul who would have a negative comment towards it (the sunburst), therefore you knew everybody would adapt …. would absorb it and … be happy to be associated with it."

"We didn't at the time have the idea that Tsogo would be as consumer focused as are trying to make it now, and I

still don't really understand the difference in the corporate and consumer brand … but the name Tsogo took off better than we thought, and that is why we use it now. It's worked in – certainly my little world where … admittedly the media consumed is all financial media, but it has been absorbed immediately like Tsogo, people know exactly what it is."

"The consumers themselves like it, it is a very South African brand, with the icon people have suddenly understood …"

"So that was, to me, the biggest and most unifying change, it is a bit scary because if we we're forever, for example split hotels and gaming again, what do you do, you've both got the same, but I think that doesn't matter. I think that unifying part of the sunburst works, and all it gives consumers is a … feeling of …of 'I know that' …. Whether they know it as Tsogo or not, doesn't actually matter, like the sunburst is the 'trust' factor, like a Mercedes badge..."

"… the experience in the hotels has to be consistent and good … Your food and beverage has to be good, all those other things have to be there, your pricing has to be relevant, but I think particularly with the market shares we've got, you get a default where people will default to the sunburst."

"There is also a bit of status in that … because Garden Court itself will never have huge status because it is three star, but instead of saying I'm a dedicated Garden Court customer, I can say I'm a dedicated Tsogo Sun customer."

"It is the whole package, the name is the least relevant. You know, a bad name doesn't help, so if you've got something that is unpronounceable, unspellable, unwritable …"

"...but when you are in some of the less upmarket, we have to find ways to do that, because … our essence 'Escape to great experiences' has to become our mantra in this company, and that is the only way you can bridge the gap between the two (upmarket and economy), I believe."

"I know through market manipulations we can always drop the 'sun' eventually, and just have Tsogo, but … the sun I just believe has got such value, and I would hate other people to pick up on that …"

"I think through our sporting visibility and I think that was a big change, the single biggest change for the group, in terms of building up Tsogo, was the sporting, I believe. Because it is so dominant, and fortunately we are a sports mad nation and I know there is a huge audience that is looking, and we also play a fantastic role in soccer, and that Tsogo Sun is coming through in those elements … I think the point is that it is part of an exciting, celebratory type of thing, and it is very dominant, and it is very distinctive and clear."

"So as an example, the Theme Park at Gold Reef, we have to spend a lot of money digging up the gardens and cleaning it up, cleaning up the paving, because it is just not a Tsogo Sun experience … but you can have a Tsogo Sun experience in a Sun1, which is a quality 1-star, and you can have a Tsogo Sun experience in a Southern Sun, which is a 4-star..."

"I think we still think we struggle in a 5-star, which is why we just have a small endorsement in the sunburst…not sure that is the case, but that is how we are perceived, we are perceived as a one to four, with a stretch to a five in hotels, and in casinos, they are also not the same. Goldfields is not the same experience as Montecasino … but it is, you know, you're going to get a … you see the sunburst and there is a recognition of excitement and quality."

"...let's say we were going to go into internet gaming … would you do at Tsogo Sun site or would you do a Montecasino site, or would you do a SunCoast site? My gut is you do a Montecasino site, it is sexy, it is high end, it is …. I think that is what we would use."

"Heritage … And time … when we had Garden Court, was it North Beach, which was Maharani, everybody called it the Maharani … it never lost that name, ever. And now it is back to what is should have always been … it takes a very long time to kill a good brand …"

"I do think the money that we invest in the Tsogo Sun brand has been very, very worthwhile, but you are going to get to a point at some stage where, that is mature enough to be able to start focusing on your product brands again."

"I think specifically with the way media is going now, social media and the access, to publish whatever you like, blogs and everything else, I think that the consistency of our experience becomes more and more important, because now that we put the sunburst on everything, everything impacts on everything else."

"The employee who is checking the guest in, is an important as Marcel (CEO) on television, to get across to the guest or the punter … what the Tsogo Sun experience is, which is why it is the whole business that has to work together to do that."

Summary of results pertaining to corporate identity

Comments from respondents which pertained to corporate identity revolved around clarity, symbolism and a common purpose towards which all employees could be geared.

The decision to follow a corporate branding strategy allowed the business to have a clear corporate identity which seemed to make decision making easier – as referred to by one respondent when considering expansion plans. According to the respondents it also appeared to elevate the status of the smaller or less significant brands.

In terms of the choice of name for the organisation, Tsogo Sun was deliberately chosen, with *Tsogo* having positive associations with local audiences and, with gaming being a strict regulatory environment. *Sun* had heritage and trust as mentioned in the introduction to Tsogo Sun. However, a couple of respondents said the word Sun does add a layer of confusion as one of the other major players in the hospitality landscape, Sun International, also has the word Sun in both the company name and in some of their products, i.e. Sun City.

When referring to symbols as a part of corporate identity, each and every respondent positively associated with the sunburst symbol. They also welcomed the application of the sunburst symbol across the entire brand portfolio, with the exception of one respondent who believed that stretching the sunburst from the budget brand (Sun1) to the ultra luxury property (Maia) was expecting the symbol to do too much. In principle however, it appeared that the application of the sunburst to all product brands had assisted in clearing up some of the confusion pertaining to the brand architecture to both internal and external audiences. It also contributed to the increase in employee pride, as discussed under employee branding.

The introduction of a common purpose for the group as a form of endorsement: *Another Tsogo Sun Experience* has contributed further to tying the brands together and creating synergy across the organisation. It is possibly also the greatest contributor to ease of decision making when considering new business ventures, immediately eliminating opportunities that do not involve an "experience". The application of the endorsement on the product brand

also adds pressure in terms of it being a promise that the products need to deliver on – an experience. One respondent was concerned stating that exactly what this 'experience' was still needed to be identified and communicated.

A few respondents flagged concerns around Tsogo Sun becoming too generic with the blanket approach of applying the endorsement and the symbol, and warned against the potential loss of the unique experiences associated with each of the product brands.

Table 9 – Corporate brand reputation

RESPONDENT VIEWS
"I think the power of the symbol being the sunburst has been extremely well represented by being the legacy sort of part of the company, going back without the word 'Southern Sun' or 'Tsogo Sun' just having this picture that people can identify with, and so I think that the more we proceed in that direction, we more cohesive and more sensible things seem to become, or running the actual business."
"You're not going to go to Virgin Active and expect to get a credit card saying Virgin Money from a gym. So … for us, the equivalent of the word Virgin is the Sunburst, you are not going to go to a Sun1 hotel and expect to get a Sandton Sun experience..."
"Some people don't understand that branding is deliberately created as part of a greater strategy..."
"As far as reputation goes, you can't really create a reputation through a brand, but you can reinforce a reputation, in my opinion, through a brand. And you can continue to build on the reputation through behaviour. So I don't know if a brand necessarily is going to be responsible for creating a reputation, "
"Companies have attempted to create a differentiating reputation for themselves, using their brand, so that when people look at that brand, they identify immediately with something that isn't necessarily related to the product that they are selling..."
"So reputation and especially in our country and that … often is related to ethical behaviour of the company and how much it invests in the communities, and also obviously counteracting the perceived issues with gambling and casinos

… and how much good one does..."

"So the reputation of a brand has got a lot, obviously to do with the product and the consistency and all that kind of thing, but the reputation in people's minds, when you want to appeal to people's mind because we are selling experiences and it is nice to have experiences … you want to sort of appeal to the heart of a person, rather than the logic of a person, so then you need to give a lot of thought and time and attention to how you are going to structure your marketing efforts around the softer stuff, but you have to be doing it, and you can't … actively market it because then it loses its credibility."

"When you think of Tsogo Sun, what comes to mind ….A great experience? And that greatness can come from doing good stuff … providing great product, having kind of good service, beautiful places, exciting events … fun stuff to do with the kids … in a safe environment …"

"You have to be authentic about what you are doing. If everybody is doing what they are doing in a company believes in what they are doing … so, it is a belief in something bigger than the product, then … it sort of seems to happen naturally. But I think that structuring the way that enables people to believe in it, is definitely helpful … the first step …"

"...we were talking about reputation … so it is all very well to have a nice branding on your property etc and a nice ad that goes out to magazines and so on, but your actual active communication has to be credible and properly managed and authentic, for people to …. For it to begin to earn that reputation of being what you are intending it to be …"

"It brings through all of those attributes, you know, dependability, reliability, the cleanliness, the service, the staff, all of what you expect from a Tsogo Sun property."

"Whereas with us it is a business, there are so many constituting components … service delivery, product, your linen, your pillows ….the dealer if you are gaming, but whatever it is, that all goes to what the brand constitutes, so I don't think we are at risk reputationally for that behaviour ."

"To me reputation is everything, especially in our business. We, as I say, sell only an experience, and our reputation is as good as that experience. So it is not as if you go home and you say, Well I've had a bad customer service experience, but I'm happy with my iPhone, because I've still got the iPhone. You can forget about the bad customer experience, because you are still happy with the phone. With use it is not like that. If you are unhappy with the experience, you are unhappy with the brand."

"Once you lose your reputation or you have lost it, I mean it is not something you get back easily, so … to me that is very important. And I think that is why it is so important that, you know we talk about the customer experience the whole time, and even in the living Tsogo scores, it came out that our staff are really, really, focused on the customer experience, because they know that is where it all hangs together."

"You see that is the thing, they are putting the Sunburst on everything … you've already … whatever happens at Montecasino affects everything else that carries that symbol. So the decision is already taken, that we want to carry that symbol, and that symbol has to stand for something. So there is going to be that association, good or bad, if something good happens at Montecasino."

"So that you are managing, you have your systems for that, not because you are protecting your brand, but because your business will fail if you do not deliver to your customers what you promised in the first place."

"The very reason that you wanted the market in the consumer and the shareholder and the employee and everybody else, all the stakeholders to understand how everything fitted within Tsogo, that you've got this enormous scale, means that when something messes up at the top, it's everywhere."

"So that is something that I'm relatively scared off … and the bottom up is just the ordinary course of business, and if we don't look after that we are going to go out of business anyway, we have to look after the customers and deliver what we say …. But the reputation side I'm worried about is top down."

"...brand values are held at marketing, they are not communicated, they are not lived externally, but go back to the Nestle example, go to Kellogg's, the mere fact that there is a brand name on there, you feel comfortable …"

"...if the master brand stumbles, it will impact everybody, I think if a product brand stumbles, depending on the size, the this, et cetera, will influence the top …"

"...if something happen terribly from a PR perspective at Monte, it would ripple effect across the group … Each hotel can be isolated but if something, I don't know what, catastrophic happened in the Southern Sun portfolio, it would impact us across the group."

"We are creating a culture where the responsibility lies …and that makes the platform much broader."

"I think that the consistency of our experience becomes more and more important, because now that we put the

sunburst on everything, everything impacts on everything else."

"Whether somebody is not going to stay at a Sun1 because HCI is in the news, it is probably stretching it a bit far … but if there was a corporate governance breakdown within Tsogo, I think definitely it would react on our whole business."

"Marcel is incredibly honest when he talks. He calls a spade a spade, if we have an issue, he talks about it, and … I've heard a lot of comments from analysts who said that, the experience that we give them versus what they used to have at Sun International, is like chalk and cheese. And there is no arrogance, it is just this is what we are, take it or leave it . … Not too much of a spin …"

"I always used to say that Monte … the tall trees catch the wind … every time something small happens, it is in the paper. Somebody wanted a quote, somebody wanted to know what is happening … and we would baulk against it … why does the tall trees always catch the wind? What about those other 10 000 trees, that are smaller, and they do just as bad as we are doing in X area … but they don't catch the wind, we catch the wind."

Summary of results pertaining to corporate reputation

All respondents believed that a favourable corporate reputation was something to aspire to. Most mentioned that the corporate brand strategy had made managing corporate reputation so much more important as reputation no longer started and ended in one brand, but permeated the entire business. A bad experience at product brand level affected perceptions about the corporate brand and the organisation as a whole.

Many respondents linked reputation in the product brands to the company's purpose: "to create great experiences" and stated that consistency and quality of experiences was something to strive towards. Non-delivery of this had huge repercussions. It appeared from some of the comments that this breakdown in delivery could occur at so many points during a guest visit, with some comments referring to quality of linen as well as the behaviour of an employee. One respondent compared the management of reputation in an organisation such as Tsogo Sun to that of an organisation such as Apple – if you had a bad service delivery

experience when purchasing your iPhone, you would not necessary default to an alternative, whereas at Tsogo Sun, this could be the case. Issues within the stronger or bigger brands seemed to have a more significant impact on corporate reputation.

In terms of the corporate brand and behaviour at this level, respondents believed that this had an impact on perceptions of both internal and external stakeholders and that it influenced corporate reputation directly. There were no comments from the respondents pertaining to whether or not this would influence behaviour in the product brands; however, comments did include the fact that the honest and direct approach of the CEO had led to favourable relationships with analysts and shareholders.

Table 2 - Corporate brand stakeholders

RESPONDENT VIEWS
"I still hear people saying I see Tsogo Sun everywhere but I don't know what it is they do, and that is strange to me, because you'd think that the … the connection would have been there. On the corporate front, I don't think there is the level of confusion that you still get at the customer …"
"...we are quite difficult to navigate … and even in the hotel side we've got … we're sort of partly centralized, partly decentralized, you know, partly corporatized in that we are very, very mixed up, and I think that is difficult for stakeholders."
"...outside stakeholders, they struggle to understand who they have to deal with all the time … so they then .. you know… use certain gatekeepers within the organization to … this is them navigating the set-up, which is quite difficult."
"We've started to engineer it … I feel that we could do a much more proactive job of it …aligning all of those things … But because there are different people involved in sending the different messages, and different departments, not only different people, it is a little bit complicated to get it absolutely accurate all the time. In a perfect environment we would have an announcement to make, it could go via the JSE first. That would be number one. Second audience, employees, internal stakeholders. And finally, the public."

"So our stakeholders will say that they are proudly Tsogo Sun shareholders, I'm a Tsogo Sun employee, I'm a Tsogo Sun customer, I'm a Tsogo Sun supplier, I'm a Tsogo Sun shareholder … What do you do? I like to go to Montecasino, I like to stay at Garden Court Marine Parade, I often use Sun1."

"Reputation and associations impact on all stakeholders, we obviously want to be able to manager it, we want to be able to manage the balancing act between property, brand, corporate brand, etc … find what that golden thread is …"

"If your stakeholder is an investor, it depends on what we do, with regards to investor relations … if your stakeholder is a customer, it is very important in terms of how we deliver the brand manuals, which I think are …"

"I think from an employee perspective, your employee survey around your values is critically important, and the fact that you respond to the criticisms or weaknesses is just as important … so it really does, to me, depend on who …Which stakeholder you are talking about as to what we should be doing, it is not just a marketing thing …It is not just a corporate thing …"

"The consistent message comes from the CEO, so where you've got the internal magazine - if you want to understand anything about what our group is doing, read that. In fact when I write board papers, I make sure I've read that, because that talks about everything we do. That aligns people to what is actually happening in the business … and when they talk, they are talking from a similar song sheet ….so I think that kind of thing, which I didn't mention, is very important, with regards to having consistency in the message."

Summary of results around corporate brand stakeholders

The respondents had a clear understanding of the corporate brand stakeholders – who they were and their importance. Most respondents listed the stakeholders according to their particular area of expertise and referred to actual examples of stakeholder relationships.

From the comments by respondents, it was apparent that all stakeholders had been engaged regarding the changes in the brand architecture and, where necessary, were shifting/had shifted their focus and relationship from the product brand to the corporate brand. It showed that there was still some work required in this regard in terms of consistent communication;

however the groundwork seemed to have been done and the tools were in place (SAP group codes, group vacancies and one internal magazine for the group, not one by brand).

Table 31 - Corporate citizenship

RESPONDENT VIEWS
"...but what Monte has done for Gauteng for example, the northern suburbs of Gauteng, they feel it sort of endears people to Tsogo Sun, so Southern Sun in particular, Southern Sun for the long … length that it existed, it brings memories and it connects themselves to that, so it is an endearing relationship."
"I suppose one is through the visual translation where you use the signage, I think that is one aspect of it, the other one is … how you conduct yourself as an organization, as a behavioural organization, okay, and your responsibility to that and I think this group is doing very well in your social responsibility zone, all those elements that come in, all aggregate."
"I think what you'll find specifically on the casino side, I think on the hotel side you might find people saying, I'm a Tsogo Sun customer. And sometimes I may stay in a Garden Court, or Southern Sun or StayEasy, but I am a Tsogo Sun customer. Then comes the casino, first and foremost, I am a Montecasino customer. And I think that will always be the case because it is not as though people generally travel to other casinos, you know … when you live in Fourways you are going to come to Montecasino, probably as your casino of choice. When you live in Krugersdorp, it is going to be Silverstar, so you are a Silverstar customer, but at the back of your mind you know that it is part of the Tsogo Sun group, but first and foremost your brand loyalty will be to an individual casino."

Summary of results around corporate citizenship

There were very few comments pertaining to corporate citizenship. It appeared to be as a result of the fact that it was fairly well entrenched in the business already as many casino licences involves an element of commitment to social investment. Most respondents understood the importance of being good corporate citizens from a business perspective, although this was more inferred than expressed.

Table 12 - Corporate culture

RESPONDENT VIEWS
"...if you're employed as an example, at Garden Court Umtata, for instance, and you don't have this connected feeling to something larger than that particular property … you behave in the way that is representative of the Garden Court Umtata, and you may not even behave in a way that is representative of Garden Court, if there are more than one, so you sort of localize your little environment. Substantial impact has been made on people, and I think this is sort of like the transition period, even now, as we more through into the … sort of real feeling of being one company and everyone understanding they are employed ultimately by one organization with one identity, with one set of values, and so on."
"Certainly the outward facing brand has a huge impact on what the internal people are experiencing."
"… initially, there was very much a Southern Sun culture, and then there was a Tsogo Sun gaming culture, which was difficult to bridge … Southern Sun was funding the gaming exploration, the application for casino licenses and so on, and with the expectation and the promise of managing the hotels and doing the F&B, and keeping the Southern Sun name in the hotels, and then ja … Tsogo was as successful as it has been in acquiring licenses initially with five, commencing with Mpumalanga. "
"Ja 'Tsogo' having derived from the Tsogo Investments name and 'Sun' from Southern Sun, that brought the two together, and … over time for the cultures have better simulated and the businesses having better simulated over time, that distinction between Tsogo Sun gaming and Southern Sun as a hotel business has dissipated, largely dissipated."
"...to my mind see that level of integration was … something … I means it's been coming for some time, but it was the first time I saw the ease of socializing and to the betterment of both respective businesses."
"So, Tsogo Sun has I suppose a corporate name and a trading name and a business name, I think this architecture is very clever and works particularly well, taking the sunburst logo through to everything barring paradise, and … I think of late all of the below-the-line marketing has helped too, the Tsogo Sun's branding and names and the stadiums and the sports events and the media, so ja … I think Tsogo Sun has carved out a good space for itself in what is quite a cluttered hotel brand market."
"You have to be authentic about what you are doing. If everybody is doing what they are doing in a company believes in what they are doing … so, it is a belief in something bigger than the product, then … it sort of seems to happen naturally. But I think that structuring the way that enables people to believe in it, is definitely helpful …"

"I think in a listed environment, your board, your main board, must be a strategic part of the arrangements of the company, for it to be effective, and it must inform everything that happens in the company..."

"...although I'd love to think that everybody is receiving all the subliminal messaging that we are sending … I think that there needs to be, in terms of our internal arrangements, more face-to-face buy in from heads of departments in our Tsogo Sun language, in the way one speaks to people, face-to-face … so the written channels that we use are all consistent in their delivery of the message..."

"We develop the corporate identity for that internal brand … with our corporate brand manager. And we align it to the corporate master brand … so that it was a version of the corporate master brand, but that it was specifically speaking to fourteen thousand plus employees, because we wanted to see those people as ambassadors, every single one of them, for the master brand. So how we ensure consistency is we came up with keywords and phrase that we thread through all these things … all the time …"

"Consistency is important … and I think as we move through this period, this last few years, that we've got better at it, and the order that you share the information is very important. So who is notified first, who is notified subsequent to that … complying with JSE requirements… is important. That people are all being informed at the right time, but also we are sending the same message to everybody."

"I think it is everybody (is responsible for building the brand), to a large extent, but it is simple things like everybody having the same business card … The thing about letterheads, I mean I've had this thing with the units, because what will happen is, Hemingway's Casino, that's the name … the legal entity is Tsogo Sun Monte (Pty) Limited, now what you'll get is, you'll get a letterhead that says Hemingway's Casino with a company registration number, and I'm saying 'no'. When you are writing to your guests, there is Hemingways Casino that is the brand with the sunburst. When you are writing a legal letter, you write it as Tsogo Sun Monte (Pty) Limited, and that is … that's it. And then you've got the company registration number and the directors and all of that … so it is simple things like that. And I think we are all responsible, from legal brand of the letterheads, to marketing, to the units..."

"But you do need a brand champion … otherwise you can't just leave it, then nothing will happen, so … I don't see a big office with 8 or 10 people, but you do need at least one individual who is the brand champion, who is the custodian of the brand."

"I'm always very wary of this cult image of the CEO because, as you say, when the person leaves, everybody says the company is dead, and it is not true, you know. In most cases it is not true. So it is a very dangerous game to play, to hang your fortunes onto the name and the face of one individual. So I think I'm must more into a strong brand."

"I think by and large we have developed a people set, where there is a … where there is a DNA within the people that work for Tsogo that is beginning to permeate, even more strongly. I think it needs a bit of definition, not to be academic, but we need to understand that we keep that value set."

"The guest experience is the brand. And there is no way the guest is going to experience corporate, because I don't deal with corporate. I don't consume corporate. I go to a hotel. I … understand the reason why we had to position Tsogo Sun we did, but … in my personal view, I don't experience … I don't go to a Tsogo Sun hotel, because I don't know what Tsogo Sun stands for, and I don't … I go to a Garden Court hotel."

"And if it is the Tsogo Sun experience, then let's define the Tsogo Sun experience, let's do away with all these other product brands. You know … and have Tsogo Sun."

"...when corporate brand speaks, and if you happen to be the mouthpiece for that, or I happen to be the mouthpiece on another occasion or whatever, when you talk brand, you should be talking something that is sacrosanct to the company … I think sometimes we are a little bit, and I'm not saying one must ever be inflexible, I think that is one of the reasons I've said to you I get on well with you from a work perspective, because we try and find a plan together … But I think there should be standards that are acceptable or not, and standards are the hardest thing to communicate in a subjective world …"

"...the problem is, you're dealing in a space where a lot of people think, ag it is iffy, it is this or that et cetera, but, I don't think it is, and some of the work that was done historically, I wasn't part of it, I wasn't even part of hotels then … on the hallmark stuff, I think that took you level from there, to there … and people don't realize it, because the leapers … it is gradual but it is sudden, do you know what I mean?"

"But what does the company stand for, how do we deliver on great experiences. Each hotel can have its own nuances, but when people leave there, there must be a touch of Tsogo magic … that goes with them."

"...I think sometimes just the labelling in publicity in whatever you do doesn't always maybe bring that true value to the product … I think the money spent on the Tsogo element, and we are cascading our culture down into behaviours, I think that is, my personal opinion, is a stronger opinion than trying to build up these brands."

"That is the centre of our universe, is actually sitting in the CEO office, okay, based on his passion and drive of driving value to Tsogo and that is through strategy, product investment, growth, all those elements of it … and we … then if I took it one layer below that, I believe that we were wrong in the past, we had the middle as being very much

part of the custodian or owners of the brand, I actually believe that the … that each of the brands owned in the corporate place … I think your office for example, has the responsibility of ensuring that the elements of the brand …"

"I think there has been a big cultural change in the last two years … is that the so-called decision makers, and I take Marcel (CEO), marketing, we go now to the region… so there is a definite display of the organization. We come to you, to listen to you, and … help you work through those issues. Whereas before, they had to get on planes to come here, into a formal thing, and it was more reporting 'upwards'. They are not reporting really upwards, I get the feeling it is much more sharing information now, than reporting."

"...we are creating a culture where the responsibility lies …and that makes the platform much broader. Okay, before it was a very narrow platform, it all lay here, everybody here trying to carry that responsibility, and you can't. So that has really gone out there, so I think that has worked well."

"And if they are not doing their efficiencies right, all the hard work they have done on the top, is going to be … and it is so easy to see that … and you know there is something wrong. So … I think that is working so well within the organization, it is creating a new culture of how we operate."

"What I find amazing is actually more important internally, than it was externally … because what we were doing was using a single brand to bring three different cultures together, it was the old gaming culture, it was the hotels culture and then it was the new Gold Reef culture, and I find that was incredibly powerful."

"Marcel is incredibly honest when he talks. He calls a spade a spade, if we have an issue, he talks about it, and … I've heard a lot of comments from analysts who said that, the experience that we give them versus what they used to have at Sun International, is like chalk and cheese. And there is no arrogance, it is just this is what we are, take it or leave it."

Summary of results pertaining to corporate culture

The responses received pertaining to corporate culture highlighted both the importance of this aspect of corporate branding as well as the impact that a corporate brand strategy has had on the organisation.

Prior to the merger of Tsogo Sun Gaming and Southern Sun Hotels, the gaming division procured Gold Reef Resorts, comprising a number of hotels and casinos which resulted in a melting pot of cultures, each with their own strengths and weaknesses. The merger resulted in a change in management and with it, a change in corporate culture. Most respondents were in agreement that corporate culture was driven from the top down, starting with the CEO. A few respondents referred to the CEO's no-nonsense and honest approach which seemed to be well received.

All respondents welcomed the fact that the merger marked the start of one corporate culture and a couple expressed their excitement at the single set of values which would streamline behaviour. One respondent mentioned that the new corporate culture seemed to incorporate aspects of each of the three key divisions that led to the merger and another noted that with the merger came a listing, which made the executive board influential in corporate culture.

Many of the comments above mentioned that Tsogo Sun was now able to communicate with one voice via the corporate brand – something that was not possible before. This led to consistency, which in turn supported the company purpose of creating great experiences. However, as one respondent stated, a guest does not "consume corporate". This showed that exactly what the experience should be in the different product brands and the level of homage each of the product brands pay to the corporate brand still needed to be defined.

Table 13 - Corporate marketing

RESPONDENT VIEWS
"We are powerful in terms of being visible in the mind of the consumer, you know the consumer sees us, the consumer knows us. But I don't know if you had to ask the consumer what Tsogo Sun stands for, if they would be able to tell you."

"When you think of Tsogo Sun, what comes to mind ….A great experience? And that greatness can come from doing good stuff … providing great product, having kind of good service, beautiful places, exciting events …"

"You have to be authentic about what you are doing. If everybody is doing what they are doing in a company believes in what they are doing … so, it is a belief in something bigger than the product, then … it sort of seems to happen naturally."

"...we used to do a lot more retail sales driven branding or marketing, in the individual Garden Court, StayEasy Southern Sun, we never really did SunSquare, or Sun1, and we used to do a lot of retail advertising in the others, and I think what we've lost is the market's clear vision of what those retail brands stood for …"

"Well sending a message, also, consistency is important … and I think as we move through this period, these last few years, that we've got better at it, and the order that you share the information is very important. So who is notified first, who is notified subsequent to that … complying with JSE requirements is important. That people are all being informed at the right time, but also we are sending the same message to everybody."

"I do think we need to be more retail, and we need to support the retail brands more on the hotel side than on the casino side. Casinos are more promotions, the hotels is more retail and advertising, but I see it more as advertising than brand building. I know that advertising is branding, but more is retail advertising … than just branding …"

"...so it is all very well to have a nice branding on your property and a nice ad that goes out to magazines and so on, but your actual active communication has to be credible and properly managed and authentic, for people to …. For it to begin to earn that reputation of being what you are intending it to be …"

"You are not ever only communicating from your corporate brand, you are communicating from all of your different brand perspectives … and those brands have their own sub sort-of personalities that one has to be careful to accommodate in the corporate brand, and vice versa. "

"...because the same way that everybody needs to know what their brand looks like and how the architecture is structured and stuff like that, everybody in such a large organization also needs to understand who is responsible for what, and where the lines of communication needs to feed into …"

"The hotel brands individually, Southern Sun, Garden Courts, StayEasy were, but Tsogo Sun was not a known brand. I think that has come out very strongly now as a corporate brand."

"But what I do still here from time to time, strangely enough, because you now see on TV and that, when you see the Tsogo Sun, I still hear people saying I see Tsogo Sun everywhere but I don't know what it is they do..."

"...in the units we communicate a lot, because we've got between 70 and 75% of our gaming revenue come from carded customers who are members of the royalty club, or the reward club, so the issue is this, that we communicate with them a lot, so the danger is that you could over communicate. So we send electronic magazines, we send SMSs, we send mailers, we communicate with them on the property … so I think the danger is more that you can over communicate than under communicate necessarily on the casino side …"

"We are powerful in terms of being visible in the mind of the consumer, you know the consumer sees us, the consumer knows us. But I don't know if you had to ask the consumer what Tsogo Sun stands for, if they would be able to tell you."

"... I would still push Tsogo Sun, but I would highlight a few of the brands, that fall under Tsogo Sun, because for me, the weakness right now is that we go and promote Tsogo Sun, we've done two TV adverts, both of them equally good, but I don't think they did anything ..."

"You know there are so many things, they are confused, they don't know exactly what they are offering..."

"I think hotels, funnily enough, is more Tsogo Sun than individual hotels. I think the Palazzo and the five star, I think they've got to start putting themselves a little bit as individual products, communicating their individuality in the right media, in terms of what they are doing, more from a PR perspective, than maybe necessarily from a hard marketing aspect. So I'm saying is that, I think if we put the money to Tsogo, hotels gain out of it."

"...what you mustn't confuse the market with, is that they think are going to get the same experience everywhere. Because a Southern Sun experience is a very different experience to a Sun1 experience. They should both be a quality experience, but they are different price points and for different needs."

"I think specifically with the way media is going now, social media and the access, to publish whatever you like, blogs and everything else, I think that the consistency of our experience becomes more and more important, because now that we put the sunburst on everything, everything impacts on everything else."

"The employee who is checking the guest in, is an important as Marcel on television, to get across to the guest or the punter … what the Tsogo Sun experience is, which is why it is the whole business that has to work together to do that. If you are not training, if you don't have the right programmes in the Academy, you won't be encouraging the

right behaviours in your staff, and you can say whatever you like, to the press, but the guests will not be living that on the floor."

"...we are selling experiences and it is nice to have experiences … you want to sort of appeal to the heart of a person, rather than the logic of a person, so then you need to give a lot of thought and time and attention to how you are going to structure your marketing efforts around the softer stuff, but you have to be doing it, and you can't … actively market it because then it loses its credibility."

"I don't think that people can be too confused, to be honest. I don't think they arrive at a Sun1 and expect the Montecasino delivery … I don't believe that, so …"

Summary or results around corporate marketing

In terms of corporate marketing, the respondents seemed to believe that the hotels were benefitting more than the casinos. There appeared to be more opportunity to grow in the group either from one hotel to another or from one hotel into a casino rather than from one casino to another.

Most respondents appreciated the benefit, from a cost as well as an exposure perspective, of being able to market under one consolidated name, in this case Tsogo Sun. However a few respondents mentioned that marketing under the corporate brand of Tsogo Sun did not alleviate the confusion pertaining to the lack of clarity in terms of what Tsogo Sun was comprised of.

One respondent commented that despite the corporate brand and corporate marketing, there should still be a focus on the product brands and the marketing thereof, albeit always in support of the corporate brand.

Table 14 - Guest experiences

RESPONDENT VIEWS
"You are going to expect certain standard of service and certain quality - brand reliability. But I think that is why I would be hesitant to get to a point where we become generic in the product brand space … We need to remain emotive, drive people to the personality, and have an identity that the people that are interested in that space, can relate to, so that you don't overpromise..."
"...but what Monte has done for Gauteng for example, the northern suburbs of Gauteng, they feel it sort of endears people to Tsogo Sun, so Southern Sun in particular, Southern Sun for the long … length that it existed, it brings memories and it connects themselves to that, so it is an endearing relationship."
"...we are selling experiences and it is nice to have experiences … you want to sort of appeal to the heart of a person, rather than the logic of a person, so then you need to give a lot of thought and time and attention to how you are going to structure your marketing efforts around the softer stuff, but you have to be doing it, and you can't … actively market it because then it loses its credibility."
"When you think of Tsogo Sun, what comes to mind ….A great experience. And that greatness can come from doing good stuff … providing great product, having kind of good service, beautiful places, exciting events … fun stuff to do with the kids … in a safe environment …"
"I don't think that people can be too confused, to be honest. I don't think they arrive at a Sun1 and expect the Montecasino delivery … I don't believe that, so …"
"...you know what Tsogo Sun and the sunburst businesses deliver, largely. You know that they are not going to deviate to an extreme for offering you very poor product service … and then within that you can then choose your pricing point,"
"Now there is the … I think the brand loyalty and affinity to the sunburst, so if I get to Cape Town, I see the sunburst on the Waterfront, I know I'm going to stay there, because that is the brand I know. So I think that has been very good from that point of view, for the casino customers, and as I said, generally for the casinos, it is just bringing them all together now under one master brand, which is good from a customer experience point of view, customer expectation, they know what they can expect to get."
"I think it is in the experience because that is what we do. We don't sell anything tangible, so … and the trick in that is, when you buy something, you can go and enjoy it for the next five years or three years or whatever long it

lasts … when you go to specifically a casino, we sell you an experience. Now it could be half and hour, two hours, three hours, but you walk out with nothing..."

"The guest experience is the brand. And there is no way the guest is going to experience corporate, because I don't deal with corporate. I don't consume corporate."

"...I will know what Tsogo Sun is, because we've done a good job in communicating Tsogo Sun, but when I get to a Garden Court I don't know what to expect."

"The actual experience … yes it is too late, I have already made the decision, I've already booked. And … the problem with that, because you haven't told me what this is about, I've got my own expectations. And the danger of that is that you're not managing your brand, because then you are not telling people what to expect, they go there, they are expecting their own thing, and then you either surprise and delight them, or you disappoint them very badly."

"If you are talking extensions still within the vein of … experiences, and I think it will work naturally, but if you're talking about something slightly stepping out of there, going the route where, you know, SAB used to own PG Autoglass or whatever … but I do think there is the opportunity to … if it's with an experiences portfolio …"

"I think if it is experiences as in you need to go to a property to experience it, like a restaurant, or concerts, or entertainment offerings, yes … I'm not sure about where we were looking with shops and apparel and …"

"Goldfields Casino is a very different experience to Montecasino … but it mustn't be a poor experience, an unpleasant experience. It must just be an experience in a casino which is much smaller, and there is less on offer, but everything on offer must be relevant to your desired experience, and relevant to what you are willing to pay for it."

"...there are some very unhappy customers, some justified, and some not, with experiences they have had, and we have 14 000 rooms, so you probably got ten thousand people staying with you, let along all the people in the casinos every single day … and there is a chance that somebody is going to have an unpleasant parking experience...I think specifically with the way media is going now, social media and the access, to publish whatever you like, blogs and everything else, I think that the consistency of our experience becomes more and more important, because now that we put the sunburst on everything, everything impacts on everything else."

"We are concentrating on the experience of our guests and punters, rather than trying to manipulate and cover up and

do things like that … I think what we do very well, and the market really appreciates..."

"The Elangeni experience is different to a Cape Sun experience, and people should actually feel it …"

"At Palazzo...the new branding is the most beautiful hotel room in Gauteng … whether it is or isn't … is completely besides the point, but the feeling of that Palazzo, Tuscan village, the home … you know, I was involved in the gaming side right in the beginning, the whole thing about gaming was based on the Vegas experience, where if you open a casino, and on a strip in Vegas there is just one after the other, so … if you just had boxes, it is not going to work. So what do they do? They build venetian gondolas, they built the Eiffel Tower, and we took that and that is why we built Monte as a Tuscan village...it is just bringing them all together now under one master brand, which is good from a customer experience point of view, customer expectation, they know what they can expect to get."

Summary of results pertaining to guest experiences

The respondents all confirmed that the overarching purpose of creating great guest experiences was what aligned the organisation. It offered a sense of trust and quality for which the organisation had, to a large extent, become known. How the various brands in the portfolio delivered on the purpose seemed to be unclear. However, most respondents commented that the experiences would be different. No respondent offered a solution to this lack of clarity, but one respondent did mention that the type of experience in the product brand should be derived from the actual property – which could be location, architecture, style, star rating, category etc.

Guest experiences should also be a premise when considering brand extensions as mentioned by one respondent.

Table 15 - Impact of a merger on a corporate brand

RESPONDENT VIEWS
"We were struggling because it was fractured, everything was all over the place … there was none of this clarity of saying, because now we have a proper brand office, we have … etc, so we didn't have that before, so there was nobody saying, hang on, let's just have a look at this."
"Ja Tsogo having derived from the Tsogo Investments name and Sun from Southern Sun, that brought the two together, and … over time for the cultures have better simulated and the businesses having better simulated over time, that distinction between Tsogo Sun gaming and Southern Sun as a hotel business has dissipated..."
"...I think Tsogo Sun has carved out a good space for itself in what is quite a cluttered hotel brand market."
"There was definitely a divide, it wasn't one and the same business … The strongest branding initiative has been Tsogo Sun … the Tsogo Sun Holdings as a corporate brand taking into each of the respective divisions and then the Sunburst logo taken into the casino properties too …. Unquestionably one and the same company."
"You weren't part of a group really. That very little interaction between the units … and I think now you find a lot of that people, you know … you won't find somebody saying I work for Emnotweni, you say I work for Tsogo Sun at Emnotweni …"
"Look I think the most powerful branding initiative was to bring the company together under one branded environment. I think, operationally, we still have a number of tasks to do … I think organizationally we are not still structured, you know, as one business, it is still quite difficult to navigate the business in terms of, you know, financial stuff, procurement stuff … I think from a marketing perspective, I think we are pretty well …"
"So there was a point before the merger where I really believed that we focused on the brand standards, the minimum requirements per brand, the consistency in terms of delivery, making sure that the guests have a similar experience, making sure that an experience in one Garden Court is going to be similar, not the same, to another Garden Court, because the product is different, but … there was a point where I firmly believed that, if you asked our clients, our customers, our guests, what Garden Court stands for, they would be able to give you the same kind of … their perceived understanding of the brand."
"Right now I don't believe that we are that anymore, I personally believe that Tsogo Sun is just a symbol, that we just … plus in everything that we have, we just took the sunburst and we said, okay, put it there, put it there, put it there … If you had to remove the sunburst, there is nothing that is a similar stretch, that says, This is the Tsogo

experience."

"I don't think we think about the customer and what the customer thinks about the brand, we … we are more focused on the delivery at the individual hotel, and we are more focused on putting the Sunburst on everything that we have without necessarily understanding what the Sunburst stands for."

"...we bought Gold Reef, which had a number of operations, we had gaming … our old gaming which was Tsogo, we had the change from Jabu to me where the gaming hotel split, went away because I didn't believe in all of that … what we said is the one way you can make this, AND we listed, so suddenly there was a public need, more than ever before at a corporate level. So I wanted to achieve two things, I wanted the market as in the consumer of our product and our … shares, to understand what the group consisted of, because nobody believed the scale and the variety, et cetera, and I wanted the people internally to understand who they worked for, and they didn't work for a unit … or a business division, I had to break all those barriers down. And the way to do that the simplest, was to make sure everybody had exactly the same business card. Now how do you do that when you have multiple brands all over the place? And the unifying thing that we said is the most valuable, is the sunburst. Nobody internally argued about the value of the icon of the sunburst, everyone was happy to be associated to that, there was a lot of feeling about whether it is Southern Sun or Tsogo Sun or … what happens to Montecasino, you know because in the gaming world it was the über brand in its own right … all of that I didn't really care about, I can deal with those sensitivities, but the one thing I wouldn't get resistance on, was the value of the Sunburst, and we used the example at the time that it was like, in our little world the Apple or the Nike, et cetera, you almost didn't find a single soul who would have a negative comment towards it, therefore you knew everybody would adapt …. would absorb it and … be happy to be associated with it …"

"... I think that's taken the longest to bed down, to get everybody to subscribe to those brand values … because it is subjective, but also because you have so many product brands underneath there, I think people got confused as to what their role is … I still don't think we are there yet, that is our biggest journey in both hotels and gaming, is to get to that."

"So I think we're in a very, very strong position today, and I think it has been remarkable in the last two years, how this Tsogo Sun brand has actually become a new brand, and it feels completely refreshed, and all the assets, I believe, fit pretty well within the Tsogo branding, and it is the first time in the … looking from a hotel portfolio, that I can feel there is a tangible thing that I can get my arm around, what our assets are."

"Tsogo Sun itself, I would say what we did three years ago when we put everything we did under the one umbrella … I was surprised Marcel (CEO) chose Tsogo Sun with the sunburst, I would have done the Southern Sun Group, but where he was right, was there was major … the thing we used to struggle with the most was the corporate brand Southern Sun hotels, and the four-star brand within that, of Southern Sun hotels, and the differentiation between the

two. So making it the Tsogo Sun group solved that problem."

"...the merger with Gold Reef City, it is because of the incorporation of Southern Sun hotels into the business, and I'm now a big supporter of Tsogo brand, because I … and it is always what happens around the braai, on a Sunday afternoon, okay. Because around the braai on a Sunday afternoon, ten/twelve years ago, it was about … actually worked for Montecasino, I know exactly who we're talking about. I worked for Tsogo Sun … what is that? Okay, now it is around the braai, I work for Tsogo Sun, and 'oh, you guys own Montecasino' …"

"...the company took a decision to deliberately; whether that was right or wrong, keep Tsogo Sun separate from Southern Sun, in every way you can imagine. So from culture to look and feel, to the nature of the way they conducted their HR practices, to how they marketed their business, all this kind of thing, it wasn't seen as needing to have …. Or in fact it was seen as the opposite of needing to have the same values as the hotel business. So the evolution of all that stuff was very interesting to observe and watch, and I think it has really taken all this time, and it was only when we acquired Gold Reef Resorts that we really sat down and had a really good hard look at the situation, and whether it was serving the business, holistically or not, to operate these two separate divisions any more. And through that acquisition of Gold Reef Resorts and the merger and stuff like that, we were forced to take a step back from ourselves and say, how are the public actually in this organization, does anybody realize, for example, that the Sandton Convention Centre is part of this company … and do even the stakeholders like the internal stakeholders realize that they also need to fit in with certain needs that the company has, in order to deliver consistent service throughout the group, or whatever the case may be."

"So I think it has gone smoothly, if you compares it to unifying a company, one looks at it as developing a marketing presence, if one looks at it as educating people as to what that particular brand stands for, I think it has gone very smoothly."

"I definitely think the unifying of the two different divisions under a single name, and the use of the Sunburst. I think that that has definitely been the things that unify us, whether we end up moving towards just a 'burst' down the line, and when I say just a 'burst', I'm not necessarily saying moving away from the name, but Woolworths will remain Woolworths, but you can still use the 'W' in different applications"

Summary of results pertaining to impact of a merger on a corporate brand

Most respondents referred to the period prior to, during and immediately after the merger as being a difficult time. There was a lack of clarity and they were unsure what the priority was. Employees were confused and not aligned. The fact that management was cognisant of this and immediately focussed on alignment made the merger a successful one.

The alignment came at the right time and primarily in the form of one market-facing corporate brand, Tsogo Sun; the consolidation of departments across hotels and gaming; changes in the brand portfolio; the application of the sunburst across the business; one purpose and a single set of values.

4.3. SUMMARY OF RESULTS FOR QUESTION 1

There was clearly strong support from all respondents pertaining to the organisation's adoption of a corporate brand strategy. There were strong positive feelings towards the sunburst and this was reflected in responses from all ten of the respondents. The application of the sunburst and the strength thereof was discussed throughout most of the key themes identified for this question. A word count analysis, as depicted in Table 26 revealed that the sunburst was the most frequently used word during the interview process with 168 mentions.

4.4. RESPONDENTS VIEWS ON HOW BEST TO STRUCTURE THE CORPORATE BRAND PORTFOLIO

This section addressed key themes pertaining to the second research question that emerged from the discussion guide as posed during the in depth, face to face interviews which were on average approximately 1 hour long.

The key themes that emerged pertaining to Question 2 were:

- Corporate brand architecture
- Corporate brand values
- Multi-brand portfolio management
- Multiple corporate brands
- Relationship between the product brand and the corporate brand

The most discussion revolved around the key theme identified: multi-brand portfolio management. With the question specifically addressing issues pertaining to the brand portfolio, gathering information around this point was useful.

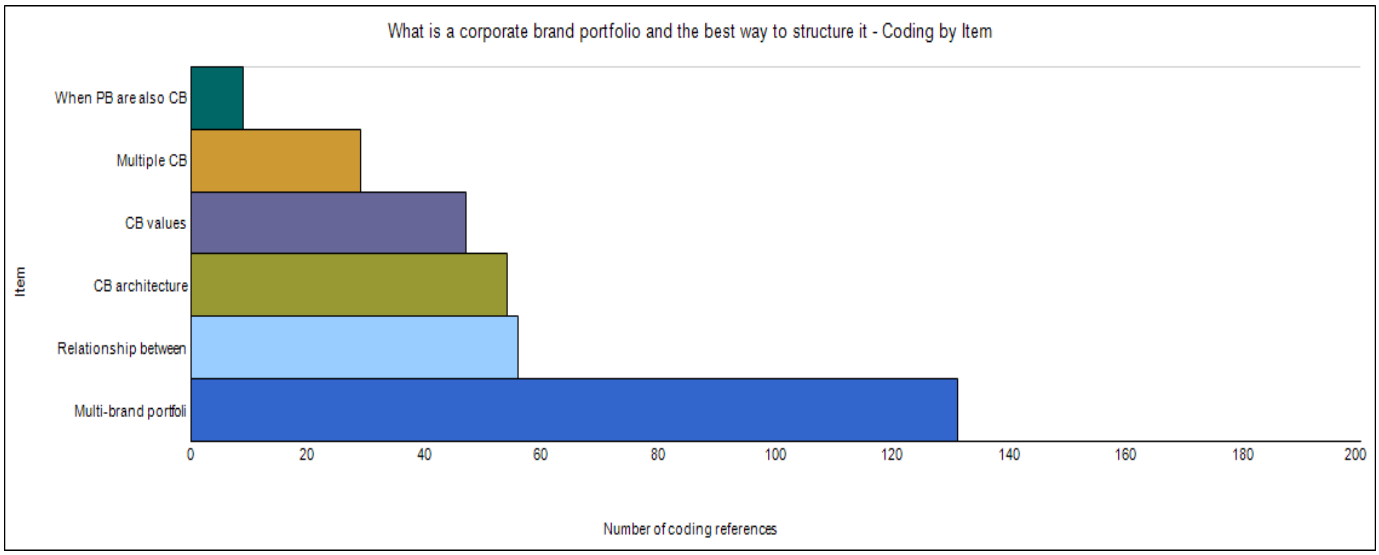

Figure 7 - Themed nodes according to contribution to Question 2 from all sources

As can be seen from the figure below, all the respondents participated in answering Question 2 with respondent six being the second most vocal in this regard.

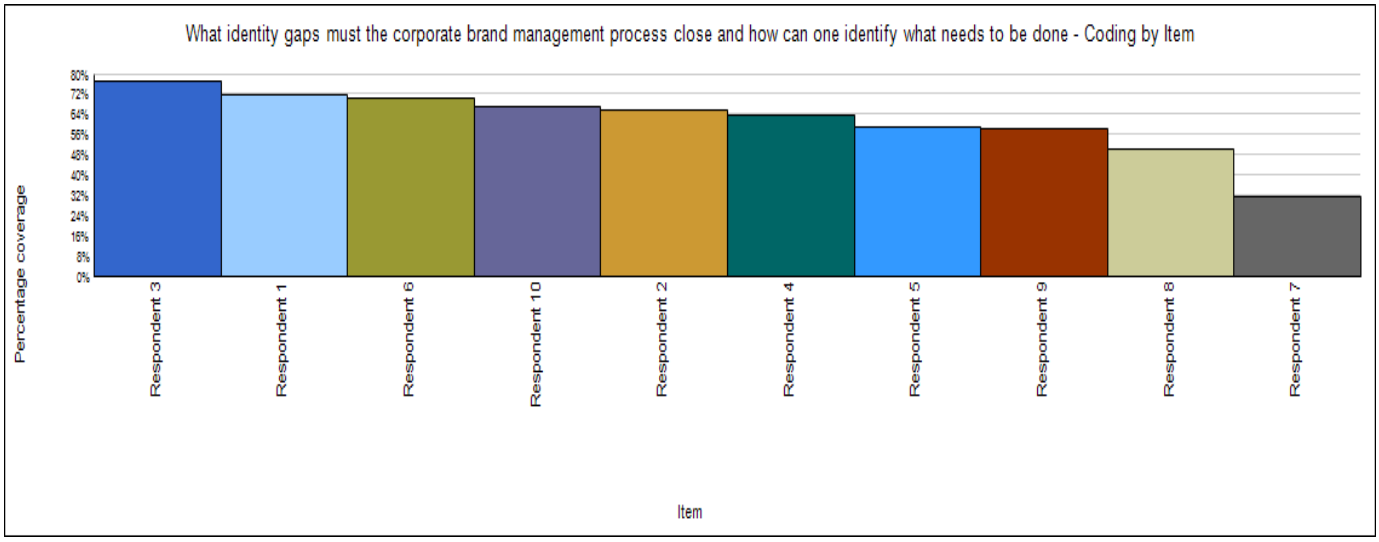

Figure 8 - Input from all sources according to contribution to Question 2

Question 2:

What is a corporate brand portfolio and what is the best way to structure it?

Table 16 – Corporate branding architecture

RESPONDENT VIEWS
"So, Tsogo Sun has I suppose a corporate name and a trading name and a business name, I think this architecture is very clever and works particularly well, taking the Sunburst logo through to everything barring paradise, and … I think of late all of the below-the-line marketing has helped too, the Tsogo Sun's branding and names and the stadiums and the sports events and the media, so ja … I think Tsogo Sun has carved out a good space for itself in what is quite a cluttered hotel brand market."
"I find sometimes the fact that we have a brand architecture, although I know it is important, is a restricting factor for the mentality of people in the business. You take the work we've done on The Cullinan, to get … through that, yes we are going to take the Southern Sun name off, it is not becoming a luxury hotel, immediately people want to put it into the box and into the next category … When we changed the De Waal, from a Garden Court to a SunSquare, the very first thing that the Ops Director said to me was, oh but now we have to do room service …. We absolutely don't. The fact that that hotel has conferencing rooms downstairs, but the one in Montecasino doesn't have, does it mean I have to build conference rooms …. We want to live by brand manuals and in this way we get a bit too restricted from having that unique personality of what the hotel is …"
"...the company was called Southern Sun Hotels, it was actually called Southern Sun Group Hotels, Gaming and Entertainment … So there has been a lot of change over the last number of years, and I think that, in essence, when we created Tsogo Sun Gaming, we created quite a lot of questions for ourselves,"
"Now in our company, you have to, and I'm using Montecasino as an example, you have to go to Montecasino which is considered almost a place that you are visiting, to stay at Sunsquare, Montecasino. Nowhere in that, am I saying Tsogo Sun. Is it necessary to say it?"
"Because of the TV adverts I would say Tsogo Sun itself (is our strongest brand), second I would say, strangely enough, Montecasino, as the retail brand, and after that probably the Southern Sun hotel brand itself."
"... actually it is so exciting but it is complicated. Do we say Tsogo 1, Tsogo 2...You know we could say Tsogo Sun Silverstar, but why would we complicate Silverstar? I don't know, to me it has got to be simple, but it has to

resonate with people and they have to identify with that, for that reason."

"You're not going to go to Virgin Active and expect to get a credit card saying Virgin Money from a gym. So … for us, the equivalent of the word Virgin is the Sunburst, you are not going to go to a Sun1 hotel and expect to get a Sandton Sun experience."

"...in the past, each of our casinos had an individual brand, and there was nothing linking the various brands, so you had Monte, as an individual master brand, you had Suncoast, Hemingway, all the casinos as their own little brand in the local community with nothing to link them, no master brand like Tsogo Sun or anything like that."

"Although people don't necessarily travel between casinos, you have your single homing casino, the one closest to your home normally, the one most convenient for you to attend. It still gives you that sort of loyalty to a brand that you've got, and I think especially when you now find that, in the past, where our casino customers would go on holiday or business or whatever, there would be no brand affinity, because they were … I'm a Montecasino customer, so if I go to Cape Town, it doesn't matter where I stay, because I'm a Montecasino customer. Now there is the … I think the brand loyalty and affinity to the sunburst, so if I get to Cape Town, I see the Sunburst on the Waterfront, I know I'm going to stay there, because that is the brand I know."

"I still think that people are saying, "I'm in a Tsogo Hotel". And it is interesting, some of the e-guest comments and some of the TripAdvisor reviews, good and bad, when you get complaints and when you get compliments, people… 'I stayed at the Southern Sun Hyde Park, and the breakfast was terrible, and I expect better from a Tsogo Sun hotel'."

"...you take something like BlackRock in Newcastle, you know we came up with Black Rock, it is a clever name for coal, coal in Newcastle, blah blah blah. If we've called it something else, would it have made a difference? I don't think so. SunCoast is SunCoast … what's the difference in SunCoast and Wild Coast and Sun City? They are just names to units, et cetera. I don't think they add or detract from the Tsogo brand at all … and I am very happy that we put the sunburst on them, because I think the sunburst adds to those names, but that is where it is."

"I think Elangeni Maharani is stronger than Southern Sun, I think The Cullinan is stronger than Southern Sun, Palazzo is stronger than Southern Sun. What happens when you start getting to more generic hotels that don't have the character, and that's when it comes in with the brand. So Garden Court Eastgate will never be anything but the Garden Court Eastgate, you can't just call it 'The Eastgate'."

"So in those levels I think those underlying hotel brands are important, and are supported by the sunburst, I don't think it detracts from Tsogo, I think they build up to the scale and so on, but they get their value from the

association with sunburst. Higher up I think the names are only identifiers, Palazzo is no different from Montecasino, and ultimately your Tsogo brand gives it a sense of trust behind it, but it would last stand alone on its own two feet, quite honestly … the sunburst doesn't make or break it."

"You know, if the Cape Grace works, Palazzo will work, I think the sunburst helps, but it is not vital to it."

"I think a name brings an understanding where on the ladder you fit … so if you were to talk BMW which is a lot easier than us, am I talking 7-series or am I talking, you know what I mean, the entry level model, and I think that something, with the addition of a Sun1, I think believe it or not, that it actually helped us, because it said there was a top and a bottom."

"To me the consumer should say, I am booking with Tsogo Sun, number 1; in his decision making tree, and number 2, according to location, according to price etc, I'll make my second decision."

"...you pick up the leader brands, the centre of gravity brands within The Hyde Parks, The Cullinans, … Elangeni Maharani, people are starting to talk less about Southern Sun, but I still think you mustn't take away there is a heritage there..."

"I think a name brings an understanding where on the ladder you fit … so if you were to talk BMW which is a lot easier than us, am I talking 7-series or am I talking, you know what I mean, the entry level model, and I think that something, with the addition of a Sun1, I think believe it or not, that it actually helped us, because it said there was a top and a bottom."

"Ja, and also to group your levels of offering, it is helpful. Ja I don't think … everything has a logical place."

"We've confused the waters ourselves, because when I look at Garden Court Mhlanga, which is not Garden Court. When I look at Garden Court Sandton City that is not Garden Court."

Summary of results pertaining to corporate branding architecture

Comments pertaining to the corporate brand architecture revolved mainly around two key tenets: the cleaning up of the architecture post the merger and the impression that the architecture was inflexible in terms of naming and categorisation.

According to many respondents, the architecture was messy and very confusing before the rebrand. The rebrand categorised the brands and clearly positioned each brand in the portfolio.

Some respondents believed that the categorisation of the brands in the architecture was restrictive and encouraged the business to force new properties into a brand or a category. Examples were given in the case of Palazzo and The Cullinan. A similar, but different comment was made pertaining to Montecasino and Southern Sun Elangeni Maharani where both Montecasino and Elangeni Maharani have stronger brand recognition than Tsogo Sun.

The new brand architecture gives clear guidance in terms of application of the sunburst, the size thereof and the use of the endorsement: *Another Tsogo Sun Experience*. Some respondents commented and stated that each brand should be considered carefully before positioning it in the portfolio and that what was good for one brand in the category might not work for another. The example given was for Southern Sun Hyde Park and Southern Sun The Cullinan. Both are 4 star properties in the Southern Sun Hotels brand. However The Cullinan attracts 5 star customers and could be branded in a similar way to the luxury properties which have a smaller, more subtle sunburst and stand alone; therefore not with the prefix: Southern Sun.

Table 17 - Corporate brand values

RESPONDENT VIEWS
"Because it has been somewhat fragmented before, we haven't know which horse to back, whether it is Southern Sun or Tsogo Sun, now we are all unequivocally behind one and the same brand."
"I mean we do have our own Tsogo value set, which drives us as employees, but I think you need to say, what part of our value set are customer value set … is corporate, okay … and what part of our value set do we then, almost

like … add on to the way we deal with the customer in each particular brand …"

"But how do you make sure that we deliver on those values, in both of those two properties? Because we haven't defined the hallmarks, we haven't defined what sits behind those brand values, we say energy, you know we are an energetic brand, what is energy? Montecasino energy versus at Southern Sun Elangeni Maharani, that is what we haven't decided and we haven't defined. How do we measure whether Southern Sun Elangeni Maharani delivers on that energy…yes we've got energy, we've got passion, we've got seduction, we've got all those fancy words, we have explained what those words mean, but we've never really gone back to the product and say, does the product deliver on these? Do the people who work deliver on these?"

"...these are our five brand values that we recommended … and we ended up changing I think, we ended up replacing sexy with seductiveness, and we ended up adding one, and I know that the stakeholders around the boardroom, for the vast majority are non marketers probably thought what are these people on about …. But those to me have become a very, very important part of how we manage and how we present things …"

"I'm a big believer that people display your brand and whatever level you go down to, it is the behaviour of those people driven from the top brand … so if we can live those values and bring them all the way through in our execution of service, attitude and caringness, and preciseness to customers, I think those brands will grow by that interaction."

"...draw people in through Tsogo, let them trust Tsogo … that's why we've got those brand values, leadership, you know, passion, variety, seductive … we create experiences … throughout our entire business, and then when they get to the hotel, the hotel brand should be their hero … and the dominating thing. It shouldn't as you said rightfully so, it shouldn't contradict Tsogo Sun, it should build Tsogo Sun subtly..."

"Substantial impact has been made on people, and I think this is sort of like the transition period, even now, as we more through into the … sort of real feeling of being one company and everyone understanding they are employed ultimately by one organization with one identity, with one set of values, and so on. That certainly the outward facing brand has a huge impact on what the inward, the internal people are experiencing."

"...you want to appeal to people's mind because we are selling experiences and it is nice to have experiences … you want to sort of appeal to the heart of a person, rather than the logic of a person, so then you need to give a lot of thought and time and attention to how you are going to structure your marketing efforts around the softer stuff..."

"We develop the corporate identity for that internal brand … with our corporate brand manager. And we align it to

the corporate master brand … so that it was a version of the corporate master brand, but that it was specifically speaking to fourteen thousand plus employees, because we wanted to see those people as ambassadors, every single one of them, for the master brand. So how we ensure consistency is we came up with keywords and phrase that we thread through all these things … all the time …"

"...but I think if we can all live towards those brand values … And unfortunately brand values are held at marketing, they are not communicated, they are not lived externally, but go back to the Nestle example, go to Kellogg's, the mere fact that there is a brand name on there, you feel comfortable …"

"...there is no doubt that it has caused more pride. And it is because of volume, and I have to say sexiness … that is what it is."

Summary of results around corporate brand values

The comments above pertain to the respondents' responses in their understanding of the role and importance of corporate brand values. The line between internal values and brand values appeared to be a bit blurry here in terms of some respondents' understanding. However it was clear that the consolidation of all values into one set of internal and external values across the group had contributed to pride and alignment and had positively impacted on people, both inside the organisation (employees, suppliers) and outside (guests).

Most respondents listed the corporate brand values, which are: leaders, energy, passion, variety and seductive. The values resonated with them and they believed that they were correct for the organisation. A couple of respondents did raise concerns in terms of how these corporate brand values permeated the business and translated into the product brands.

Table 18 - Multi-brand portfolio management

RESPONDENT VIEWS
"If you look at our brand portfolio before the merger it was complicated. There were descriptors saying Garden Court by Southern Sun …"
"I think that it definitely … you would still default to a Garden Court. You wouldn't look for a competitive 4-star product in that locale, I would think. I mean, I know people who travel and who stay in our properties and pace with exactly that choice …"
"You are not ever only communicating from your corporate brand, you are communicating from all of your different brand perspectives … and those brands have their own sub sort-of personalities that one has to be careful to accommodate in the corporate brand, and vice versa."
"...Nelson Mandela Boulevard … but you kind of feel a little bit embarrassed it is in our portfolio, even those old lifts, you know what I mean … It is almost one of those that had a refurb from the Holiday Inn but never left it …"
"There are centre of gravity properties, but there are also properties that are centre of gravity, but we downplay that Tsogo link, does that make sense? And I think we just have get the balance right …"
"I still have a little funny feeling about the Southern Sun being the four star, because I think it is too … it was so strong and now it's this funny thing in there, and I'm not sure whether it is weakening our sun or endorsing the sun..."
"I think they (the brands) all have their purpose … I understand why we've got our five-star individual brands … I don't think I would … I don't know if we have to make a distinction between brands for Southern Sun Hotels and then Southern Sun Resorts separately..."
"Ja, and also to group your levels of offering, it is helpful. Ja I don't think … everything has a logical place."
"I think it will be interesting to see how The Cullinan does, as a stand-along distinctive product, and we know all the reasons behind that, why we want to do that … but … I think really what we did to is, we did tidy up and we brought the Sunburst into all gaming, so we actually aggregated our assets as a company, within the structure it actually reflects back to the holding company."

"My gut says it confuses the consumer … at least we've got the Sunburst which flows through everything, so that when you are a Garden Court customer, you still would have the Sunburst on there. It's not building the Garden Court brand, what does the Garden Court brand stand for..."

"...we used to do a lot more retail sales driven branding or marketing, in the individual Garden Court, StayEasy and Southern Sun, we never really did SunSquare, or Sun1, and we used to do a lot of retail advertising in the others, and I think what we've lost is the market's clear vision of what those retail brands stood for …"

"... if you take a BMW as an example, the 6-series BMW, which is very different to the 1, you've got people who want that particular kind of experience, but … they like the … logo brings it all together, you know what you are going to get, whether it is the 1, 2, 3, 4, 5, 6 or 7 …. It brings standardization across your brands … where I'm ….still unconvinced is whether Tsogo Sun is a retail brand, and there again, gaming is different to hotels, where …in hotels it is a lot more retails in terms of what you need to be marketing than … or I see it as being more retail than … the gaming side. And, although we use the Tsogo Sun and most of our TV adverts are the Tsogo Sun where we try and show the whole business, we still have to have the call to action in a hotel business with your summer specials and your … individual brand advertising which we've done very, very little of … recently."

"And I believe if you can't shine enough light like the torch between brands, you have a blurred effect, and that blurred effect got them (Intercontinental Group) to actually dump the Garden Court brand."

"So I think we're in a very, very strong position today, and I think it has been remarkable in the last two years, how this Tsogo Sun brand has actually become a new brand, and it feels completely refreshed, and all the assets, I believe, fit pretty well within the Tsogo branding, and it is the first time in the … looking from a hotel portfolio, that I can feel there is a tangible thing that I can get my arm around, what our assets are."

"...should just be Tsogo with the sun, or Tsogo Sun with the crest, and I think the word 'sun' in the South African/southern Africa thing has had such a strong presence, I don't believe we must give that up."

"I think it (the confusion) has largely been cleared up, you just have to look at the names to see that we are part of one and the same group."

"I think it definitely to the benefit and the betterment of those budget brands, because you bring all those attributes associated with the sunburst logo to those properties."

"...it doesn't denigrate the association with the sunburst logo, you don't think any less of the fact that it is applied to

a Sun1 property … It brings through all of those attributes, you know, dependability, reliability, the cleanliness, the service, the staff, all of what you expect from a Sun property, Tsogo Sun property."

"I don't think that people can be too confused, to be honest. I don't think they arrive at a Sun1 and expect the Montecasino delivery … I don't believe that, so …"

"...you know what Tsogo Sun and the sunburst businesses deliver, largely. You know that they are not going to deviate to an extreme for offering you very poor product service … and then within that you can then choose your pricing point, where you want to come in..."

"...but I think (in terms of our strongest brands) it is first and foremost Monte and then … SunCoast. Within hotels, I mean, the Beverley Hills stands out as … iconic. The Palazzo hotels definitely also right up there …"

"...it was quite a journey for us because in the past, each of our casinos had an individual brand, and there was nothing linking the various brands, so you had Monte, as an individual master brand, you had SunCoast, Hemingway, all the casinos as their own little brand in the local community with nothing to link them, no master brand like Tsogo Sun..."

"...then with the coming into being the master brand Tsogo Sun, what we did was to put this sunburst as part of the branding of each property … and I think the benefit to us from that is, that people now know what to expect when they get to that casino … this is part of the Tsogo Sun group, this is what I am going to get here."

"I think Montecasino as a brand has always been very strong, and Suncoast also in Durban has been a very strong brand, although I must say I think the other units have each got their own brand identity to a … lot bigger extent now than in the past. If you look at Silverstar and Golf Reef, even Golden Horse, there is much more of an individual branding also linked into the master brand."

"No, I don't think (the stretch from budget to luxury does damage to the brand portfolio). I think, because even though you've got from the absolute luxury like the Palazzo and Maia and 54 on Bath to Sun1, they all fit into their own brand category, and I think what is good is that, you didn't lose like the Southern Sun hotel, for the Garden Court or the StayEasy, for those are … customer facing brands, and people know what to expect, so it is not just Tsogo Sun hotel and it is from five-star to two-star, nobody knows what they are going to get."

"So I think it is very good to maintain the customer facing brands, because it is important that the customer knows, this is who I am, and when I get to a Garden Court, this is what I get, when I get to a StayEasy that is what I get."

"I think on the hotel side you might find people saying, I'm a Tsogo sun customer. And sometimes I may stay in a Garden Court, or Southern Sun or StayEasy, but I am a Tsogo Sun customer. Then comes the casino, first and foremost, I am a Montecasino customer."

"...three years ago the people would have said Montecasino, if I'm not happy at Montecasino I'm going to Silverstar because I don't like Montecasino … Now they say, if I'm not happy with Montecasino, frankly I'm not happy with the Tsogo Sun casinos..."

"I still hear people saying I see Tsogo Sun everywhere but I don't know what it is they do."

"...there is no confusion between investors and analysts and that, they write about Tsogo and Sun. But the customers will still say, Is Carnival one of your casinos? Or … so there is that between the two Suns, you know, Tsogo Sun and Sun International. So I'm not sure whether that will ever go away completely, because of Southern Sun Hotels …"

"I think the TV ad has gone a long way to reinforce what it is that we do … but I think a lot of people still just see the sunburst and Tsogo Sun like at rugby and sporting events and say, 'yes I see the name but what do they do?' …"

"Look I think the most powerful branding initiative was to bring the company together under one …branded environment. I think, operationally, we still have a number of tasks to do … I think organisationally we are not still structured, you know, as one business, it is still quite difficult to navigate the business in terms of, you know, financial stuff, procurement stuff … I think from a marketing perspective, I think we are pretty well…"

"I still think Southern Sun is the strongest brand that we've got … and I think it is the strongest brand, I think, because it has a history."

"I think that Garden Court has lost some of its impetus, because that … we've become too Netcare, we allowed it to … in its branding environment, we allowed it to have, or develop, some … or we appointed some leaders in that brand that were not really up to the task …and I think that we're in the process of cleaning that up, and I think regionalization has kicked in … in that those managers are seen to have to perform in the total regional set and necessarily not only in the brand set…"

"Each of the product brands that fall under Tsogo Sun, have their own individual brand … I would not necessarily even say brand standards, because I'm not even sure whether the Garden Court in Sandton delivers the same

experience as the Garden Court in Mhlanga … you know, because we would expect that at least the product is new, because the product has been refurbed … the experience would be similar, but in my view, it isn't."

"...we are more focused on the delivery at the individual hotel, and we are more focused on putting the sunburst on everything that we have without necessarily understanding what the sunburst stands for."

"...we have brand custodians, but they don't do anything. They don't mean anything, you know. I mean, if Norman wants to introduce something in Southern Sun Montecasino, John van Rooyen, who is the brand custodian, has nothing to say. He can't do anything about it. So … the Southern Sun brand, which is a product brand under Tsogo Sun, then loses meaning, so I think the company needs to make a decision as to what is important, is it the Southern Sun experience that is important, or is it the Tsogo Sun experience that is important."

"I will know what Tsogo Sun is, because we've done a good job in communicating Tsogo Sun, but when I get to a Garden Court I don't know what to expect."

"Montecasino is part of Tsogo Sun, Southern Sun, Elangeni Maharani is part of Tsogo Sun, and that job has been done, and I think it was a good job, I'll give that a tick. But in terms of what is common between Montecasino and Southern Sun Elangeni Maharani I don't know …"

"I would remove Maia …because it is too high and it does nothing … honestly, we just have it there. I don't think it does anything … for the brand, except maybe pretty pictures on the web..."

"I would also take away Sun1."

"I would still push Tsogo Sun, but I would highlight a few of the brands, that fall under Tsogo Sun..."

"...you know there are so many things, they are confused, they don't know exactly what they are offering, but … and I still didn't know what was Tsogo Sun."

"Ultimately Montecasino will stay Montecasino, the name will never be anything other than Montecasino, it will never be anything than Tuscan, all that sort of thing, it just pulls it into the group with the sunburst."

"You may be a … five star hotel person, and that is what you do, and so when you are in Johannesburg you go to the Palazzo … that doesn't stop you defaulting to us when you go to Cape Town where we don't have a five star, but there will be The Cullinan..."

"There is also a bit of status in that … because Garden Court itself will never have huge status because it is three star, but instead of saying I'm a dedicated Garden Court customer, I can say I'm a dedicated Tsogo Sun customer. "

"So, I think Elangeni Maharani is stronger than Southern Sun, I think Cullinan is stronger than Southern Sun, Palazzo is stronger than Southern Sun. What happens when you start getting to more generic hotels that don't have the character, and that's when it comes in with the brand. So the Garden Court Eastgate will never be anything but the Garden Court Eastgate, you can't just call it 'The Eastgate'..."

"In a big company and especially an old company, you get the outliers, that don't fit in anywhere. So whether it be an associate hotel such as The Gold Reef City Theme Park Hotel, now we can stick a brand on that or we cannot stick a brand on it, I battle to care. It is a 90-room hotel, it is too small, it doesn't matter. Sabie River is a classic one where, if you've got a 60-room hotel there, to really fix it would probably take R70/80 million. No it is not on brand, and I can't afford to fix it, and I can't give it away, so what do you do? You just end up ignoring it forever and say, look in the grand scheme of things, perfection would be nice but we don't have perfection here."

"...it is all about consistency, taking a helicopter view and saying, when you put the sunburst out for Goldfields Casino in Welkom, are you putting it out in a professional, coherent manner that is as … that you will be as proud of as if you are putting out a Montecasino..."

"...the only one I'm a little bit in the back of my head worried about, is Garden Court, because I think we are treating it like a dumping ground and I think that is wrong. It needs to go back to … a brand that we are absolutely proud of, like we are, of Stay Easy and Sun1, which I am."

"There are centre of gravity properties, but there are also properties that are centre of gravity, but we downplay that Tsogo link, does that make sense? And I think we just have get the balance right … And then of course the associate hotels, like the Golf Reef City hotels or whatever they are just no man's land …"

"...to Golden Horse it doesn't matter one jot … if the person is only going to Golden Horse and doesn't use any of our other products, it doesn't matter as it is a Tsogo Sun experience. But the fact that we are a bigger group, that is where it matters …"

Summary of results around multi-brand portfolio management

This theme of multi-brand portfolio management elicited a large response from the participants. Some respondents had fairly strong opinions about recommended changes to the brand portfolio. Some felt that some brands did not receive enough support from a branding and marketing perspective and others felt that some brands did not deserve to carry the sunburst (Sun1). Comments were also made in opposition to the Sun1 comment and stated that the luxury and ultra luxury properties did not benefit from the sunburst.

A number of respondents raised concerns regarding the product brands losing their identity. Although most understood the focus on building the corporate brand, they believed that this should be supported by dedicated support for the product brands. Two respondents mentioned that they believed Garden Court had lost its brand identity. One respondent felt strongly that, although the sunburst symbol was strong and that the application of the sunburst across the portfolio seemed to create alignment and synergy, there appeared to be very little understanding of what the sunburst actually stood for.

Table 19 - Multiple corporate brands

RESPONDENT VIEWS
"When we had Holiday Inns and we had Southern Sun, we set them up as competing divisions … okay so what happened then is, we set them up as competing divisions, and we thought that was good … but in actual fact we ended up with one corporate environment with dog-eats-dog."
"...through that acquisition of Gold Reef Resorts and the merger and stuff like that, we were forced to take a step back from ourselves and say, how are the public actually seeing this organisation, does anybody realize, for example, that the Sandton Convention Centre is part of this company"
"I went through the process of when we bought the Garden Court brand, and de-branded from the various intercontinental brands related, so we brought it all in-house … and I watched over the years, not really from a branding point of view, more about a dysfunctional company point of view, where the choice was to run it in

pockets." "So then we took our five star products, and branded them InterContinental, so you had the Beverly Hills, was Intercontinental, the Palazzo, Sandton Sun Towers… and so on, and those all became five star." "And when they (InterContinental) dumped that brand (Garden Court), we bought that brand because we had a distribution of, I think, about 26 hotels at that stage. But as I say, the local market saw it as a domestic product and that is the strength of a budget brand in terms of … they must see it as that kind of a brand." "...you had Montecasino, as an individual master brand, you had SunCoast Hemingways...with nothing to link them, no master brand like Tsogo Sun...Then with the coming into being the master brand Tsogo Sun, what we did was to put this Sunburst as part of the branding of each property … and I think the benefit to us from that is, that people now know what to expect when they get to that casino … this is part of the Tsogo Sun group, this is what I am going to get here."

Summary of results pertaining to comments around multiple corporate brands

This theme took comments from respondents that referred to the journey the organisation had taken over the past couple of decades. The result of the journey was the emergence of multiple corporate brands, as mentioned by a couple of respondents above. According to one respondent it led to brands or business units within the same organisation competing against each other for a piece of the same business.

Table 40 - Relationship between product brands and corporate brands

RESPONDENT VIEWS
"I don't think the corporate brand stops at all, as far as I'm concerned the corporate brand doesn't stop, I think the product brand must be supportive of the corporate brand, and I think that … currently, my experience has been, in some cases probably lessening as time goes by, but if people say to me, 'Where do you work' and I say 'Tsogo Sun', and then they look at me blankly and I say, 'Montecasino', the immediately know who I'm talking about." "...if the corporate brand is strong enough in the public domain, the … product brand needs to just enhance that corporate brand."

"I think you have to do retail at Southern Sun, you've got to do retail at Garden Court, probably definitely those two because they are big brands. StayEasy is smaller and cheaper, you can get away with less, SunSquare, if you want to change what it is, and be relevant to those kinds of people, you are going to have to do brand marketing."

"As Tsogo Sun hotel, because I don't have any public Tsogo Sun Montecasino hotels, then as a person in the public, I'm not going to make that connection, so it is hard to make that connection, and is it necessary, to make that connection?"

"So you're not going to make a big marketing campaign about Tsogo Sun if you want someone to go and visit Montecasino."

"So I think there certainly is a big amount of pride in that, where especially with the Gold Reef units in the past, they were very sort-of individualistic, so you worked for Garden Route, and that is where you worked, I mean that was it. You weren't part of a group really. That very little interaction between the units … and I think now you find a lot of that people, you know … you won't find somebody saying I work for Emnotweni, you say I work for Tsogo Sun at Emnotweni …"

"I think Montecasino as a brand has always been very strong, and Suncoast also in Durban has been a very strong brand, although I must say I think the other units have each got their own brand identity to a … lot bigger extent now than in the past. If you look at Silverstar and Golf Reef, even Golden Horse, there is much more of an individual branding also linked into the master brand."

"I think what you'll find specifically on the casino side, I think on the hotel side you might find people saying, I'm a Tsogo sun customer. And sometimes I may stay in a Garden Court, or Southern Sun or StayEasy, but I am a Tsogo Sun customer. Then comes the casino, first and foremost, I am a Montecasino customer.

" I mean, three years ago the people would have said Montecasino, if I'm not happy at Montecasino I'm going to Silverstar because I don't like Montecasino … Now they say, if I'm not happy with Montecasino, frankly I'm not happy with the Tsogo Sun casinos..."

"Although I am a Montecasino customer, there is a Tsogo Sun casino here and I'm going to SunCoast."

"Even at the time of booking, I don't know what to expect. To the extent that yes, I know that there is … besides the price differentiator, I am going to Durban, I know that I am going to a SunCoast, there is the SunCoast Towers

and the SunCoast SunSquare, Elangeni Maharani, there is Garden Court, and I don't know if it is Garden Court South Beach. The only thing that will make me book any of those is the price..."

"(people say) 'I stayed at the Southern Sun Hyde Park, and the breakfast was terrible, and I expect better from a Tsogo Sun hotel'."

"...every single employee in the group will present the same look and feel business card, because that is the coherence that works."

"in gaming in particular, if the results get released and they are not that good they will tell you that you are not making the slot machines hold more …"

"I think it is because we are a big group, and we want him to, when he is going to book accommodation somewhere else, see the sunburst and associate the experience, assuming we've given him a decent experience at Golden Horse … because that is the whole point of the thread, of you know what you are going to get when you go to other properties, whether it be a casino or a hotel, no matter what grading it will be, you choose the brand, then you choose the product within that, that aligns with what your budget allows and what you … desire from the experience. I think it is important that it, at least subconsciously, you recognize that you were at one of these properties."

Summary of results around the relationship between the corporate brand and the product brands

This section contains comments pertaining to the interaction between the product brands and the corporate brands. From the above responses it was apparent that most respondents agreed that there was a relationship. The comments included what they believed the ideal relationship should be as well as the current status of the interaction between the brands.

Some respondents believed that the corporate brand did not stop and that it permeated the entire organisation whilst others believed that the corporate brand stopped when the product brand started. Exactly where this point was, is not clear.

There seemed to be strong support for the product brand to remain on the forefront for the guests on the gaming side, with comments made that guests choose to go to Montecasino or SunCoast etc. Despite this, nobody commented that the corporate brand was creating barriers for entry or causing confusion.

4.5. SUMMARY OF THE RESULTS FOR QUESTION 2

The above direct quotations from the interview transcriptions gave insight into the practitioners' views on what a corporate brand portfolio was and what the best way was to structure it. There seemed to be a sound understanding of the complexities involved in managing a multi-brand portfolio, particularly post a merger and these thoughts and opinions have been highlighted.

The most discussion revolved around the key theme identified: multi-brand portfolio management. With the question specifically addressing issues pertaining to the brand portfolio, gathering information around this point was useful.

There were very clear thoughts on what the strongest brands in the portfolio were and these appeared to be consistent throughout the responses. What was interesting was that, despite Montecasino and Southern Sun Hotels emerging as the two strongest brands in the portfolio, the respondents with a casino history seemed to cite Montecasino first and foremost and the ex hotel respondents defaulted to Southern Sun Hotels. Although all respondents were in favour of a corporate branding strategy, some (respondent five and respondent nine) felt strongly that the product brands in the portfolio were currently not getting enough support and exposure.

4.6. PRACTITIONER PERCEPTIONS REGARDING THE CORPORATE BRAND MANAGEMENT FUNCTION

Questions 1 and 2 revolved around corporate branding and portfolio management whereas questions 3 and 4 addressed the actual function and role of brand management within an organisation.

In question 3 the following key themes emerged:

- Corporate brand decision making
- Corporate brand decisions and stakeholders
- Corporate brand management and the marketing department
- Corporate brands must be managed
- Commitment to building the corporate brand

The dominant theme in this section revolved around corporate branding decision making as shown in figure 9 below:

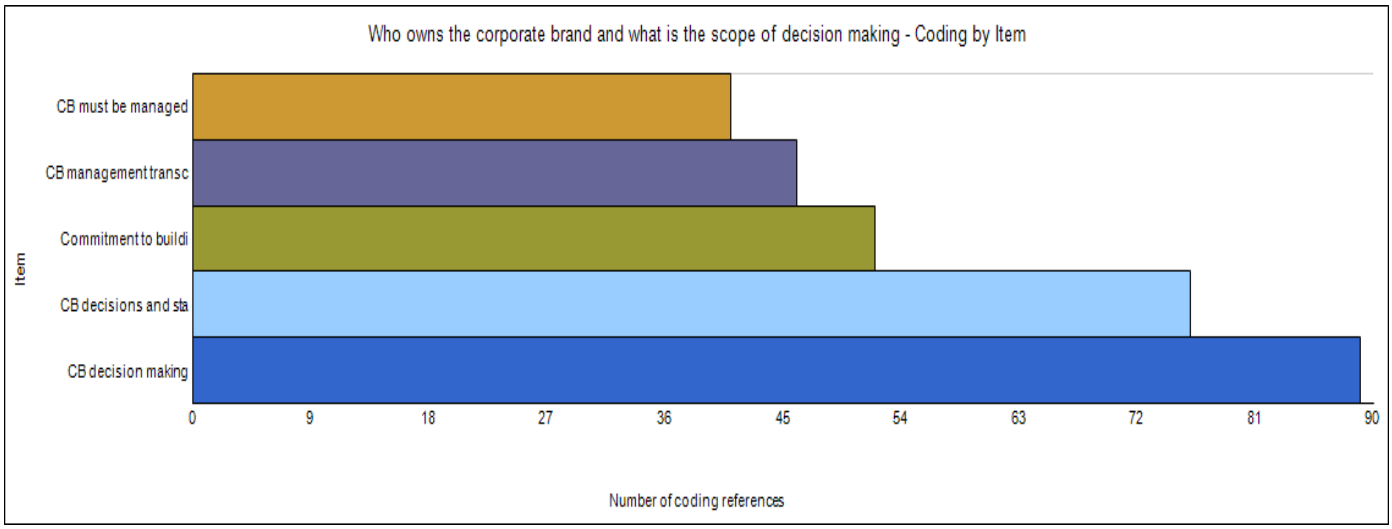

Figure 9 - Themed notes according to contribution to Question 3 by all sources

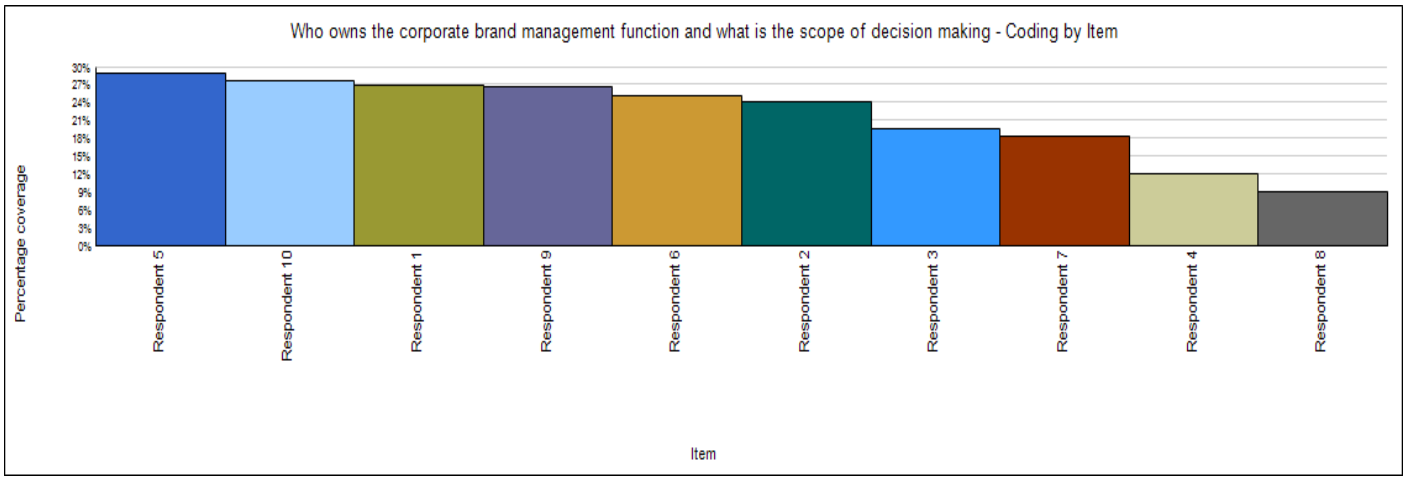

Figure 10 - Input from all sources according to contribution to question 3

Question 3:

Who owns the corporate brand management function and what is the scope of decision making?

Table 51 – Corporate brand decision making

RESPONDENT VIEWS
"I will give you the politically correct answer that everybody says (decisions regarding branding), it would be Marcel. Ultimately your CEO has to do that."
"The consistent message comes from the CEO, so where you've got the internal magazine which we do quarterly, which by the way I think is fantastic … if you want to understand anything about what our Group is doing, read that. In fact when I write board papers, I make sure I've read that, because that talks about everything we do. That aligns people to what is actually happening in the business."
"The CEO … I think the CEO is responsible for managing the corporate brand …it is owned by … biggest shareholder value that … shareholders are actually buying into the assets of that, and are aggregated by that … so ultimately the CEO is responsible to that, and we are the disciples and followers of ensuring that we are adding the value to the shareholder value in terms of that..."
"Well you to (have a space for branding decision making), you have the Brand Council, the thing is, how effective is that to do that, you know …"

"I think the power of the symbol being the sunburst has been extremely well represented by being the legacy sort of part of the company, going back without the word 'Southern Sun' or 'Tsogo Sun' just having this picture that people can identify with, and so I think that the more we proceed in that direction, we more cohesive and more sensible things seem to become, or running the actual business. So that's sort of been my, in a nutshell, the understanding of the brands and the company, because the brand obviously is a representation of what is happening inside the company."

"...your corporate brand, as far as the directing of it, and the management of it, and those sorts of things… I would think that you would need a strategic corporate brand office that managed and cared for those brands, because those are …. sort of the soul of the company …"

"Those messages typically will be guided by the CEO, ja. But again, it is something that we need to work on very carefully, and put in place a much more well-managed system with one person controlling it …"

"We were struggling because it was fractured, everything was all over the place … there was none of this clarity of saying, because now we have a proper brand office, we have … etc, so we didn't have that before, so there was nobody saying, hang on, let's just have a look at this. Also I think the value of having something like a brand council is huge, because the communicating of what the brand's intentions are … the people that … the Ops Directors who go out into the field and communicate that with the staff … all of that is so important, so I think that is also part of the process."

"But really the brand should inform … it should almost like be something that has considered what and who the business is, given it a face and a personality, and then it should inform everything that that business does."

"The strongest branding initiative has been Tsogo Sun … the Tsogo Sun Holdings as a corporate brand taking into each of the respective divisions and then the sunburst logo taken into the casino properties too …. Unquestionably one and the same company..."

"I think it starts with the Chief Executive, I mean he's got … there I think that is the culture, the DNA, the minimum that goes into the name, and he takes ownership of the branding …. Everybody else performs a function, whether it is trademark registration, searching, defending, or disputing, whatever it is, people have roles underneath that. But I think that is where it should begin and end."

"I think that is where the Brand Council works very well, because you get the principle's clarified there, and then the

implementation is practical in the various divisions and departments. I think that works … because once we decided that this is the … business card, this is the look and feel … that is just implementation after that, you don't need a corporate office to do that you can print your own business cards, because you know what it should look like…"

"...but you do need a brand champion … otherwise you can't just leave it, then nothing will happen, so … I don't see a big office with 8 or 10 people, but you do need at least one individual who is the brand champion, who is the custodian of the brand."

"I'm always very wary of this cult image of the CEO because, as you say, when the person leaves, everybody says the company is dead, and it is not true, you know. In most cases it is not true. So it is a very dangerous game to play, to hang your fortunes onto the name and the face of one individual. So I think I'm must more into a strong brand."

"So … and to me, there is no right or wrong, it depends on what this company wants to achieve, and what the business objectives are at the time. But when you look at what I personally feel, what I think about brands right now, I don't then they are a brand focused organization, and I don't think we take our brands seriously..."

"I think it can be managed better … the only thing that is working for us right now, but I'm not sure if it is sustainable or long term, is that we've got a CEO who is very involved, so … for me that works to the extent that … what PR is doing and saying and what HR is doing and saying, he has a view and a say in that."

"And when he (CEO) is not there, we are in trouble, because we are not talking to each other. We are talking to him, and everyone get to talk to him, and he is there to guide and manage how we project the brand, which is a good thing, but in his absence, in my mind, nothing happens."

"I look at every single bit of external marketing that leaves the company A, I want to see what they are marketing, is the thing commercially rationale, is my one way of checking once a day that what we are packaging and presenting to the public, it works. But secondly it is all about consistency..."

"The allocation of capital is fundamental to my job, you said what are you ultimately responsible for the most, is how I allocate the money. Do I send it to the shareholder or do I put it into the product, that's why those are signed off, and I see the brand as very much part of that."

Summary of results pertaining to discussion around corporate branding decision making

From the respondents' comments, it would appear that most believed that corporate branding decisions were ultimately the responsibility of the CEO. Most of the respondents felt that the rebrand and the alignment of business and brand had brought about a focus to the area of branding. This, they believed, had resulted in clearer and more thought through decision making with comments made regarding the centralised brand office and the role of the brand council.

Two respondents felt that the role of the CEO was too dominant, and raised concerns around decision making when he was not around. One of these respondents (an influencer) felt that the organisation had become less brand-focussed than before. This respondent was an employee of Southern Sun Hotels prior to the merger.

Table 22 - Corporate brand decisions and stakeholders

RESPONDENT VIEWS
"I think in a listed environment, certainly one … or in fact in any large corporate, put it like that … your board, your main board, must be …..it must be a strategic part of the arrangements of the company, for it to be effective, and it must inform everything that happens in the company..."
"...because the same way that everybody needs to know what their brand looks like and how the architecture is structured and stuff like that, everybody in such a large organization also needs to understand who is responsible for what, and where the lines of communication needs to feed into …"
"...and I think it is being done, I think for all of our collateral, whether it is out board reports or committee reports or … living Tsogo,, all of that is driving that same behaviour, so it starts to …. Filter down, everybody takes their own responsibility and again … dissipate it to those they have responsibility for."
"Consistency is important … and I think as we move through this period, this last few years, that we've got better at it, and the order that you share the information is very important. So who is notified first, who is notified subsequent to that … complying with JSE requirements, etc etc … is important. That people are all being

informed at the right time, but also we are sending the same message to everybody."

"In a perfect environment the way it would work would be … that … where we would have an announcement to make, it could go via the JSE first. That would be number one. Second audience, employees, internal stakeholders. And finally, the public."

"Because the customer is saying, Sun International and Tsogo Sun is the same, they … don't get it. The corporate world, when you look at the analysts and the investors and that, they frankly get it"

"So our stakeholders will say that they are, hopefully, proudly Tsogo Sun shareholders, I'm a Tsogo Sun employee, I'm a Tsogo Sun customer, I'm a Tsogo Sun supplier, I'm a Tsogo Sun shareholder … What do you do? I like to go to Montecasino, I like to stay at Garden Court Marine Parade, I often use Sun1."

"What I am glad we've got, if you talk about a central repository, is that we have a far more central control approach to everything that we do in communication, whether it be the internal communication to staff, through Talking Tsogo, whether it would be the brand communication through the marketing, what they'd go out and talk to the people about, whether it be changes in it, et cetera, I feel it is far more controlled..."

Summary of results around corporate branding decisions and stakeholders

With the listing of the organisation certain changes had to be made. Communication to stakeholders and particularly shareholders became important and the board had become an integral part of decision making. In order for the corporate brand to deliver on the brand values, communication needed to be on time, consistent and authentic. According to the above comments, all the systems are in place to allow for communication to all stakeholders with channels existing and custodians in place.

Some respondent's comments reflected the sentiments from stakeholders as positive, particularly pertaining to the corporate brand, and referred to themselves as Tsogo Sun stakeholders as opposed to that of a particular brand.

Table 23 - Corporate brand management and the marketing department

RESPONDENT VIEWS
"What the regionalization did was, it de-internalized it, if there is such a word … the brand competitiveness, and moved branding back to its home, which is in marketing. Because branding is not operations … that is what people don't understand. Branding is driven by marketing."
"You are not ever only communicating from your corporate brand, you are communicating from all of your different brand perspectives … and those brands have their own sub sort-of personalities that one has to be careful to accommodate in the corporate brand, and vice versa."
"Put quite frankly I pulled marketing and everything into the middle … And there are only, I would think … I don't know how many people really understand the individual functions, but there are … there is like a core of people that sit in the middle function, and look across divisions and across businesses..."
"I don't think, if you go into that brand versus marketing, I don't think you are ever going to split them completely … because they co-depend on each other so much."
"Traditionally a company our size, listed, et cetera, would have a corporate affairs department, which would have a central person responsible for receiving all the information and then dispersing and making sure it is all coherent, I just don't believe in multiple layers, and quite frankly, we can't afford it because believe it or not, as big as we are, we are watching costs very closely; and I've taken all of that stuff, essentially to myself, where I don't need another person to be briefed about … I just do it myself. That has advantages and disadvantages; the advantage is that I don't spend ten million rand on a corporate affairs department like we used to have … which is a massive saving. The disadvantage is that if I don't do it properly, then it doesn't work. However, I also find that if I do it myself, at least I believe, there is a more honest answer, because I have eliminated 'spin'. If you take what happened in Tsogo, and you ignore the debacle around the executive loans, and … which is a big thing to us all so ignore that … and you ignore the recent breakup of HCI, if you look at what's actually happened in Tsogo, there has been a very coherent message, and a very consistent message for the last three years, of what we're doing and why. That plan, that strategy, the communication of that plan and strategy hasn't changed at all. That's been absolutely perfectly communicated and implemented, we've stuck to the damn thing, and for better or worse, it has worked. I think where it has gone wrong is … the ability … so I can never defend myself and my own pay, which is a disadvantage, so when it affects me then I'm stuck, because I have nobody to talk on my behalf, that's got to default to the shareholder, which largely was taken care of where it matters. You know there is a media buzz around Tsogo, but most people actually got through the thing, and even when the shareholder has problems, I can't talk for the shareholder … and neither could a corporate affairs department. The most you would get there is a quicker turnaround, but for the most part I haven't missed that department."

Summary of results pertaining to corporate brand management and the marketing department

All the respondents that contributed to this question agreed that branding was a function of marketing and that therefore corporate branding, despite it taking its cues from business strategy, should reside in the marketing department.

Some respondents made reference to corporate branding decisions traditionally being in the area of corporate affairs but that this role was not required in an organisation such as Tsogo Sun.

Table 24 - Corporate brands must be managed

RESPONDENT VIEWS
"I don't think people will go and change something in the business on the brand side without coming to you (me) …that they know there is a function and an expertise and it must go there."
"So there was a point before the merger where I really believed that we focused on the brand standards, the minimum requirements per brand, the consistency in terms of delivery, making sure that the guests have a similar experience, making sure that an experience in one Garden Court is going to be similar, not the same, to another Garden Court, because the product is different, but … there was a point where I firmly believed that, if you asked our clients, our customers, our guests, what Garden Court stands for, they would be able to give you the same kind of … their perceived understanding of the brand. Right now I don't believe that we are that anymore..."
"You have to be authentic about what you are doing. If everybody is doing what they are doing in a company believes in what they are doing … so, it is a belief in something bigger than the product, then … it sort of seems to happen naturally. But I think that structuring the way that enables people to believe in it, is definitely helpful … the first step …"
"Your corporate brand, as far as the directing of it, and the management of it, and those sorts of things… I would think that you would need a strategic corporate brand office that managed and cared for those brands, because those are …. Sort of the soul of the company …"

"We develop the corporate identify for that internal brand … with our corporate brand manager. And we align it to the corporate master brand … so that it was a version of the corporate master brand, but that it was specifically speaking to fourteen thousand plus employees, because we wanted to see those people as ambassadors, every single one of them, for the master brand. So how we ensure consistency is we came up with keywords and phrase that we thread through all these things … all the time …"

"But you do need a brand champion … otherwise you can't just leave it, then nothing will happen, so … I don't see a big office with 8 or 10 people, but you do need at least one individual who is the brand champion, who is the custodian of the brand."

"And then, the ultimate phase, I think I can compare it as strong as when it was started in the last two years we brought Tsogo in. I see the sun sign in that naïve period and Tsogo Sun today as probably being on par as building equity into the brand. So I think we are back at the pedestal in terms of the brand, which puts a lot of responsibility on us, how we deal with that."

"...we brought back Southern Sun hotels and we went about this whole brand manual thing..."

"...we made the mistake of seeing brand management in terms of product delivery, to a lesser degree service delivery..."

"(The thing) I think was probably significant at the time, but overstayed its welcome, was … and it was driven as well, by the individuals that managed those brands, in that when we had brand management, I think the brands … the number of properties within those brand portfolios, was too great."

Summary of results around the management of the corporate brand

All the respondents were in agreement that corporate brands should be managed. Exactly how they should be managed differed across the respondents. Some believed that the organisation had confused brand delivery with product delivery with too little focus on the more emotive aspects of the business.

Table 25- Commitment to building the corporate brand

RESPONDENT VIEWS
"I think the company needs to make a decision as to what is important, is it the Southern Sun experience that is important, or is it the Tsogo Sun experience that is important. And if it is the Tsogo Sun experience, then let's define the Tsogo Sun experience, let's do away with all these other product brands. You know … and have Tsogo Sun."
"I would still push Tsogo Sun, but I would highlight a few of the brands, that fall under Tsogo Sun, because for me, the weakness right now is that we go and promote Tsogo Sun, we've done two TV adverts, both of them equally good, but I don't think they did anything ..."
"I'd feel that we're kind of on a very good path with regard to building the strength around Tsogo, I … think through our sporting visibility and I think that was a big change, the single biggest change for the Group, in terms of building up Tsogo, was the sporting, I believe."
"I don't think you have to put Southern Sun ads out there, okay … I'm saying, from time to time you can, like when we use, we use a medium like the Springboks, and they say they stay with us at Tsogo, and we show a picture of a room..."
"I think although we've done quite a lot of work in trying to bring it all together with Tsogo Sun, if you go and speak to an employee in Monte, they'll tell you that they work at Montecasino, and the living Tsogo single value system is incredible important in driving it even further, because you just entrench Tsogo more, but it … it is not there, you still have people that work in a Garden Court to be passionate about the brand … And where it is a bit confusing..."
"One thing I need to add to the Tsogo Sun halo brand is if casino advertising is banned, it is going to be a very, very valuable thing that we've done..."

Summary of results around commitment to build the corporate brand

The respondents' comments all reflected support for building the corporate brand; however most said that this could not be done in isolation of the product brands. It seemed that most believed that in building the product brands, the corporate brand was also strengthened. No respondents gave suggestions in terms of how they believe this could be done.

4.7. SUMMARY OF RESULTS PERTAINING TO QUESTION 3

Emerging from the interviews, there appeared to be a strong sentiment supporting the fact that corporate brands must be managed centrally and that it was not simply a marketing function. Six respondents stated that they believed that corporate branding decisions resided with the CEO. This was supported by the CEO. As the second two questions were a little more complicated for a generalist in an organisation to answer, the amount of information gathered was reduced. However the information gathered showed the respondents understanding of the question and all ten respondents participated in answering this question.

4.8. RESPONDENT PERCEPTIONS REGARDING BRAND MANAGEMENT PRIORITISATION

This section addressed the respondent views according to key themes that emerged in an attempt to answer question 4. It revolved around gaps that occur in practice and how organisations prioritise what the brand management process needed to do. Whereas question 3 revolved around the actual brand management function and positioning within the business in order to be able to make decisions, question 4 addressed what the type of things were that brand management should be focussed on and in what order, based on the needs of the business.

The themes were:

- Brands must have clear strategies
- Product brands influence corporate brands and vice versa
- Product brands must support corporate brand values
- The role of the product brand in the corporate brand portfolio

The fact that the product brands must support the corporate brand values came out as the theme that elicited the most comments as shown in Figure 11 below. The knowledge that the brands were all interconnected and that there was a golden thread that connected the product brands to the corporate brand via the corporate brand values came across strongly.

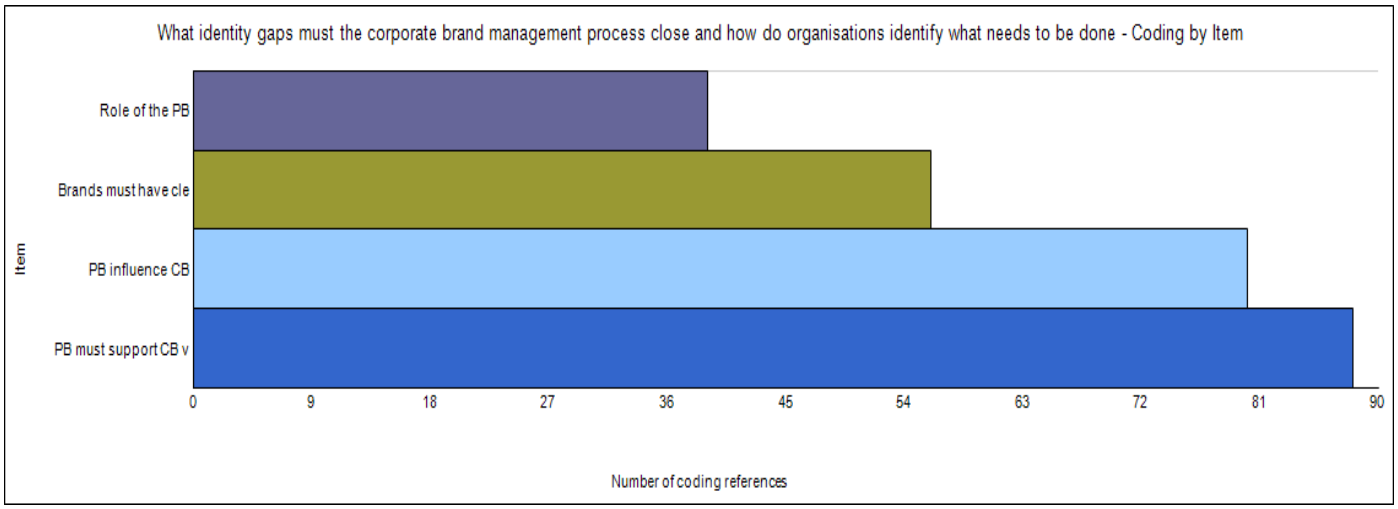

Figure 11 - Themed notes according to contribution to Question 4 from all sources

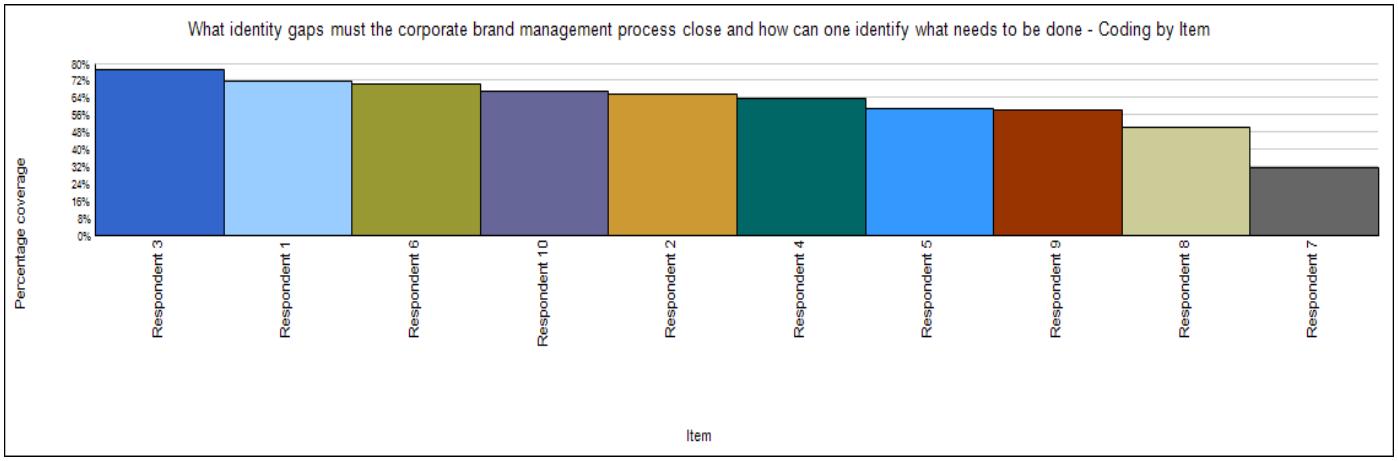

Figure 32 - Input from all sources according to input to Question 4

Question 4:

What identity gaps must the corporate brand management process close and how do organisations identify what needs to be done?

Table 26 – Brands must have clear strategies

RESPONDENT VIEWS
"...it depends what your goal is, your objective, I guess the point is that, now there has been fourteen years of Montecasino, and everyone knows it as that, and we've invested X in developing the public understanding of what that is, how much effort would it take to change it?"
"You are going to expect certain standard of service and certain quality …. Brand reliability …. But I think that is why I would be hesitant to get to a point where we become generic in the product brand space …"
"He said he doesn't understand our branding nomenclature, how we associate different names with different products and properties, he says he get terribly confused, he doesn't know what is in the business and not … I think it has largely been cleared up, you just have to look at the names to see that we are part of one and the same group."
"...we do have our own Tsogo value set, which drives us as employees, but I think you need to say, what part of our value set are customer value set … is corporate, okay … and what part of our value set do we then, almost like … add on to the way we deal with the customer in each particular brand …"
"I don't think we are a brand focused organization, and I don't think we take our brands seriously, I don't think we think about the customer and what the customer thinks about the brand, we … we are more focused on the delivery at the individual hotel, and we are more focused on putting the sunburst on everything that we have without necessarily understanding what the sunburst stands for."

Summary of results regarding the importance of clear brand strategies

Most respondents agreed that both product brands and corporate brands needed to have clear strategies and that the one could live in isolation of the other. There were strong views about the way in which Tsogo Sun was currently managing brands with some feeling that there was not a clear strategy around the role of the product brands. Exactly how the brands interact was also unclear. One respondent warned against the product brands becoming too generic and another gave a hint as to where one could potentially start, by stating that the brand strategy chosen would depend on the overall business objective.

Table 27 - Product brands influence corporate brands and vice versa

RESPONDENT VIEWS
"I don't think the corporate brand stops at all, as far as I'm concerned the corporate brand doesn't stop, I think the product brand must be supportive of the corporate brand..."
"Where do you work' and I say 'Tsogo Sun', and then they look at me blankly and I say, 'Montecasino', the immediately know who I'm talking about."
"...if the corporate brand is strong enough in the public domain, the …product brand needs to just enhance that corporate brand."
"So if you want someone to stay at Southern Sun Montecasino … you need to advertise what it is you want … are selling. So you're not going to make a big marketing campaign about Tsogo Sun if you want someone to go and visit Montecasino."
"Now in our company, you have to, and I'm using Montecasino as an example, you have to go to Montecasino which is considered almost a place that you are visiting, to stay at SunSquare Montecasino. Nowhere in that, am I saying Tsogo Sun. Is it necessary to say it?"
"...draw people in through Tsogo, let them trust Tsogo … that's why we've got those brand values, leadership, you know, passion, variety, seductive … we create experiences … throughout our entire business, and then when they get to the hotel, the hotel brand should be their hero … and the dominating thing. It shouldn't as you said rightfully so, it shouldn't contradict Tsogo Sun, it should built Tsogo Sun subtly."
"Or when they are in a one-horse town, and they see the sunburst …. In a hotel that they would never have had in their basket … they would now consider it."
"...that for me has been the key so far, really, it (the sunburst) connects everything..."
"You are going to expect certain standard of service and certain quality …. brand reliability …. But I think that is why I would be hesitant to get to a point where we become generic in the product brand space … We need to remain emotive, drive people to the personality, and have an identity that the people that are interested in that space, can relate to, so that you don't overpromise."

"You know, the product brands must always look to the parent, or the grandparent, or whatever the case may be …"

"I think it definitely to the benefit and the betterment of those budget brands, because you bring all those attributes associated with the Sunburst logo to those properties."

"Because Sun1 in itself has got a ….brand equity in that name, you've already got an association and a reputation in Sun1 … but it is being … elevated with again, certain attributes associated with the sunburst …"

"The mistake, or the problem that I think we have made, is that we haven't communicated with the Garden Court brand … so yes, I will know what Tsogo Sun is, because we've done a good job in communicating Tsogo Sun, but when I get to a Garden Court I don't know what to expect."

"I still think that people are saying, "I'm in a Tsogo Hotel". And it is interesting, some of the e-guest comments and some of the TripAdvisor reviews, good and bad, when you get complaints and when you get compliments, people… 'I stayed at the Southern Sun Hyde Park, and the breakfast was terrible, and I expect better from a Tsogo Sun hotel'."

"I think the money spent on the Tsogo element, and we are cascading our culture down into behaviours, I think that is, my personal opinion, is a stronger opinion than trying to build up these brands."

"I think in gaming, from an outsider, it is a very different model, because they are destinations that have multiple elements that attract different people, and at the end of the day you want footfall and you are competing to create this destination where it is a safe entertainment choice …because there's great choices from that aspect, so … I think gaming is probably product, more … I think hotels, funnily enough, is more Tsogo Sun than individual hotels."

"The minute that you start going to a Tsogo Sun 1, (Tsogo Sun 2, as opposed to Garden Court and Southern Sun), I think you … you are changing the perception of … because you are bringing the lower, unfortunately what you are driving is the lowest denominator of your element, which is an efficient model, which is what is therefore, can affect the glamour and glory of the whole master brand."

"When I showed them numbers of Montecasino, in turnover, people would still not believe it, they say 'are you sure there are not too many noughts on that number' so … there is a lot of pride in the theme, and I do worry sometimes when we don't theme places, I've just been to Emnotweni for a conference, and their new developments

is deliberately not themed. Now we're all about themes, especially from a product brand side … think about the work we've done now recently on Gold Reef City, the time theme, it is all about the turn of the century … evolution … you keep that, to make it sexy, because Tsogo Sun doesn't have a theme..."

Summary of results around product brand influences on the corporate brand

In this section the comments pertaining to the fact that there was a relationship between the product brands and the corporate brand were listed. All respondents were in agreement that the brands influenced each other. Most believed that the product brands needed to work harder, particularly those in the hotel space, so as to remain unique and authentic in an attempt to not become too generic.

One respondent related the relationship between the brands as one of a child and a parent stating that the product brand should always look towards the corporate brand for direction. Some respondents mentioned that some product brands in the portfolio were stronger than the corporate brand. How this influenced the corporate brand and what the correct brand strategy was for these strong product brands in the future was not answered.

Table 28 - Product brand must support corporate brand values

RESPONDENT VIEWS
"Because we haven't defined the hallmarks, we haven't defined what sits behind those (inaudible), we say energy; you know we are an energetic brand, what is energy? Montecasino versus energy at Southern Sun Elangeni Maharani, that is what we haven't decided and we haven't defined. How do we measure whether Southern Sun Elangeni Maharani delivers on that energy? Versus how we measure Montecasino …yes we've got energy, we've got passion, we've got seduction, we've got all those fancy words, we have explained what those words mean, but we've never really gone back to the product and say, does the product deliver on these? Do the people who work deliver on these?"
"I'm a big believer that people display your brand and whatever level you go down to, it is the behaviour of those people driven from the top brand … so if we can live those values and bring them all the way through in our execution of service, attitude and caringness, and preciseness to customers, I think those brands will grow by that

interaction."

"...for us it is an exciting experience, whether it is a hotel or whether it is a casino, but you know you are going to get a quality experience wherever you go, experiences relevant to you..."

"My gut says it confuses the consumer … at least we've got the sunburst which flows through everything, so that when you are a Garden Court customer, you still would have the sunburst on there. It's not building the Garden Court brand, what does the Garden Court brand stand for, what does the Daisy brand stand for … there is not a lot of that."

Summary of results around the product brand adoption of corporate brand values

One respondent stated that the product brands should take on the corporate brand values to some extent. This was supported to some degree by respondents who stated that there should be some kind of golden thread across the brand portfolio. Exactly how this needed to be done was unclear. There were opposing views in terms of how to clear up the existing confusion in terms of what comprised Tsogo Sun. Some respondents believed that more focus was required on positioning the product brands and others believed that, by focussing on the corporate brand, the product brands should take care of themselves as the behaviour and the corporate brand values would permeate the organisation.

4.9. SUMMARY OF RESULTS PERTAINING TO QUESTION 4

The comments made by respondents indicated that the brand management function was a marketing function but with a strong influence across the organisation. This insight came from the key themes that showed the influence the product brands had on the corporate brand and vice versa. With the product brand management role currently being done by the respective marketing managers, this made sense. The fact that the brands were all

interconnected and that there was a golden thread that connected the product brands to the corporate brand via the corporate brand values came across strongly.

4.10. SUMMARY OF ALL THE RESULTS

Throughout the ten interviews the respondents' responses seemed to be congruent, with the exception of respondent five who believed that the organisation currently puts too much emphasis on the marketing of the corporate brand. This was supported, but to a lesser degree, by respondent nine.

In terms of question 1, the respondents showed a clear understanding of the concepts of corporate brand and product brand. Their comments also showed that they believed that the corporate brand permeated the organisation and one respondent (respondent one) accurately captured this by stating that the corporate brand does not start and end. This indicated a kind of fluidity of the corporate brand.

The respondents understood the role of the brand architecture and supported it. Respondent six believed it was a guideline as opposed to rigid structure whereas respondent five believed that there should be stricter guidelines in terms of what exactly each brand in the brand architecture stood for, particularly in terms of the employee and customer as stakeholders.

Although the respondents referred to the brand portfolio correctly, there is no indication that they understand that a brand portfolio can be actively managed as a strategic business activity.

The importance of the corporate brand values came across strongly and most respondents had views in terms of the amount of brand stretch that the organisation could accommodate. Some felt that the organisation's core was in 4 star hotel delivery, and that the stretch into the ultra-luxury category, Maia, was not useful; whereas others felt that the inclusion of the sunburst on the Sun1 budget hotel brand was not good for the portfolio.

The responses received around key themes that emerged from question 3 strongly revolved around the fact that the corporate brand management role was a role that relied heavily on relationships. It linked the product brands to the corporate brand; it communicated to the various stakeholders; it needed to understand the brand vision of the CEO, who most agreed was the custodian of the corporate brand, and it also needed to ensure that the corporate brand values permeated the organisation.

Although not all respondents had clear answers pertaining to the exact positioning of the role, they supported it being a marketing role with the ability to have an overall view of the business and a direct link to the CEO as the overall brand custodian.

Question 4 solicited the least conversation as it was not something that was currently happening within Tsogo Sun. This could be supported by the fact that there seem to be very little thought around the active management of the brand portfolio as indicated under the results of question 1. The information gathered did however clearly suggest the respondents' support for a process whereby the corporate brand management role contributed to solidifying and crystallising the corporate brand's identity by understanding what the status of the corporate brand was and prioritising what needed to be done to achieve this.

The table below indicating the most frequently used words during the ten interviews reiterates the key findings as stated above:

Table 29 - Most frequently used words during interview process

Word	Count	Weighted Percentage (%)
Sunburst	168	0.63
Experience	152	0.57
Montecasino	141	0.53
Branding	99	0.37
Customer	88	0.33
Portfolio	86	0.32
Marketing	50	0.19
Experiences	48	0.18
Reputation	46	0.17
Everybody	45	0.17
Stakeholders	43	0.16

5. DISCUSSION OF THE RESULTS

5.1. INTRODUCTION

The purpose of the research was to understand how organisations comprising a multiple corporate brand portfolio could optimise the brand management process by ultimately providing them with a framework for corporate brand decision making. Ten senior executives of Tsogo Sun were interviewed over a period of two months. Although the literature review assisted in providing some answers to the four research questions posed, the interviews contributed further and allowed for the testing of the literature in practice. This section takes findings from interviews and compares them to what the theory in the literature review revealed.

The following sections discuss the results of the research by question, showing similarities between the literature and practice, highlighting the differences and aims to offer possible explanations, where appropriate.

5.2. DISCUSSION AROUND THE ORGANISATION OF THE CORPORATE BRAND IN AN ORGANISATION COMPRISING MULTIPLE CORPORATE BRANDS

Question 1:

What comprises the corporate brand in an organisation with multiple brands?

The first question intended to understand the composition of a corporate brand in an organisation that has multiple brands and more than one corporate brand, either through

legacy, merger or acquisition. When comparing the theory of what a corporate brand was made up of against the responses from executive management, it was clear that they understood the bigger picture of the benefits of adopting a corporate brand strategy. When comparing Balmer's model in terms of what comprised corporate branding (Balmer, 2008), which are corporate identity, corporate communication, corporate marketing and corporate reputation, to the key themes that emerged through the interviews, all four of these components were mentioned by most executives as can be seen under section 4.2.

Although the executives interviewed did not always use the correct theoretical terminology, it was evident that they understood that a corporate brand involved multiple stakeholder engagement, as stated by Balmer (2008): With the emergence of corporate branding as a business concept, many companies realised that what they had in fact previously perceived as product brands offering goods and services to customers, were in fact evolving into corporate brands with multiple stakeholders. Those interviewed made mention of the following stakeholders of Tsogo Sun: shareholders, employees, the board, guests and suppliers.

The respondents were cognisant of the fact that there needed to be a commitment to build a corporate brand and that time is required to see the investment made. The theory supported this, as per Abratt and Kleyn (2012) and Hatch and Schultz (2001), who stated that these associations had been formed in the minds of all the various stakeholders over a period of time. As per the theory these associations are deep rooted and very difficult to change, but if positive, can be very powerful (Aaker, 2004b). The respondents gave clear examples of the powerful impact the adoption of a corporate brand strategy had on Tsogo Sun, even over a short period of three years.

In terms of corporate identity, the respondents seemed to all have a very narrow, albeit correct, understanding of what it was, mostly referring to visual expressions such as logos and symbols as opposed to it being only the result of Tsogo Sun's visual identity, the promise it makes to its customers, the brand personality and the way in which the brand was communicated (Abratt & Kleyn, 2012; Van Riel & Balmer, 1997). All the respondents welcomed the application of the sunburst symbol on every brand within the organisation's portfolio and made reference to an emotional connection to it. They also made reference to the fact that the application of the sunburst symbol across the portfolio allowed the business to attract and orientate the right audiences and stakeholders (Hatch & Schultz, 2003) as supposed by the theory.

According to the theory, due to the integral role of employees in the management of the corporate brand, corporate branding relies on consistent messaging about the brand's identity in order to result in a coherent delivery across all the stakeholder groups, internally and externally (Abratt, 1989). The respondents all supported the role of the employee in the corporate branding strategy – some more than others. Most respondents referred to the internal values as drivers of employee behaviour; however there was no evidence that the identified values were developed to purposefully support the corporate brand.

When an organisation's corporate communication is brand driven, it results in a consistent and coherent brand image in the mind of all the stakeholders. In order to do so successfully all employees need to fully understand the organisation's core values (Malmelin & Hakala, 2009). The respondents made mention of the fact that employee behaviour had changed – with references to pride and opportunity – with the adoption of the corporate brand strategy and the roll out of the internal values. As mentioned above, the adoption of the organisation's values would be most powerful if they directly impact the growth of the corporate brand.

When making recommendations to Tsogo Sun management, the importance of this correlation needs to be reiterated to ensure that there is a direct relationship between the organisation's values and its corporate brand strategy.

All the respondents were aware of the fact that the large brand portfolio of Tsogo Sun had in the past created confusion in the minds of some of the stakeholders. They reiterated the importance of good corporate communication. Some respondents were concerned that the corporate communication at present did not address stakeholder confusion in terms of what comprised the corporate brand portfolio and also each of these brands' respective positioning. This is a realistic concern and supported by the theory that states that corporate communication can impact stakeholder images pertaining to more than one brand. This could result in confusion relating to the individual brands in the portfolio (Biehal & Sheinin, 2007). In order to avoid this confusion, corporate communication should be managed and organisations need to plan to communicate their corporate brand through marketing initiatives that could increase perceptions around the clarity of the brand portfolio, making product brand communication easier (Muzellec & Lambkin, 2009).

The respondents seemed to have a very limited understanding of corporate marketing, referring to marketing mostly as marketing to the guest as a stakeholder. Corporate marketing encompasses corporate communication and transcends the traditional marketing approach. It furthermore acknowledges the value of the role of employees as brand ambassadors and it also understands the importance of organisational culture (Balmer, 2001a). This insight is important as successful corporate marketing considers the organisation's core values and will ultimately have a positive impact on its reputation. Should Tsogo Sun consider this holistic approach to marketing, it could lead it to reconsider the way in which they market the organisation as well as their organisation's product brands (Van Riel, 1992). It appears that

currently Tsogo Sun predominantly markets the corporate brand to all stakeholders, including the end consumer. One respondent was opposed to this approach stating that the guest has no relationship with Tsogo Sun and that the guest 'consumes' the product brand, be it for example a casino, a hotel, a movie or a restaurant. The figures below depict two corporate brand strategies with figure 13 showing Tsogo Sun's current approach to corporate marketing and figure 14 showing a potentially more suitable alternative strategy.

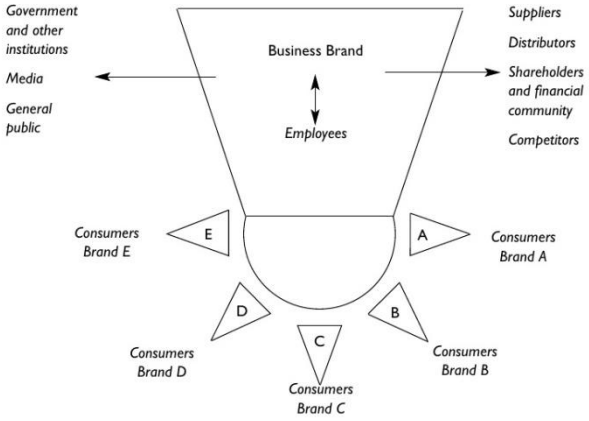

Figure 13 - Corporate brand strategy ***Figure 14 - Alternative brand strategy***

Source: Muzellec & Lambkin, 2009

The literature review offered Ikea as an example of a strong corporate brand with a strong organisational culture which underpinned its corporate marketing approach. Its corporate strategy is based on Ikea's vision and brand values which contribute to its strong corporate identity thereby gearing it towards consistent corporate marketing. Tsogo Sun differs from Ikea in a number of ways; most profound for this discussion is the fact that Ikea is a monolithic brand and Tsogo Sun is not. What is relevant to this discussion is the way in which Ikea has translated its vision into brand values, its brand values into a strong corporate identity, its corporate identity into developing a strong corporate culture and then lastly a consistent and authentic corporate marketing message. Tsogo Sun needs to check if it has in

fact followed the same steps in terms of its corporate brand. From the interviews there is evidence that most of these steps were followed, but this does not seem deliberate or strategic.

All of the above components of corporate branding are done in an effort to create a favourable corporate reputation. Therefore managing each component of the corporate brand is of utmost strategic importance to an organisation such as Tsogo Sun, particularly as corporate reputation is, according to the literature, very difficult to manage, often shaped by narratives surrounding the brand. It guides consumer decision making and contributes to the brand value of the organisation. Reputation affects the way in which an organisation operates. Whilst valuable this also makes it vulnerable when considering the speed of innovation and change, particularly when considering the pace and all encompassing space in which the media operate (Malmelin & Hakala, 2009).

According to Aaker (2004b) employees are the basis for the corporate brand image in organisations with a heavy emphasis on service such as Tsogo Sun. Therefore all employees need to understand the brand image and be aligned to it in order to deliver the brand promise (Mangold & Miles, 2007). Although all respondents were quite vocal stating that Tsogo Sun employees were the organisation's brand ambassadors, they differed in the way in which they should be aligned. This mostly stemmed from the fact that most of the product brands, where most employees work, have been in existence for longer than the corporate brand. In many cases, the product brands within the Tsogo Sun portfolio are stronger than the corporate brand. Historically, the product brands were clearly defined, both internally and externally, as most of the organisational efforts were geared towards creating unique experiences within each of the brands. With the introduction of a relatively new market facing corporate brand,

these brand building efforts have been put on the backburner in support of growing the corporate brand.

In the literature review Hillenbrand and Money (2007) suggest a causal relationship between corporate reputation and corporate responsibility. Corporate responsibility or good citizenship is consumed with creating an environment where the organisation is respected and admired, both internally and externally. It is closely linked to an organisation's values. Citizenship in practice reveals itself through an organisation's environmental policies and social and community initiatives (Aaker, 2004b). Tsogo Sun has successfully entrenched corporate citizenship, in part due to the very strict legislative nature of the casino side of the organisation. From the respondents comments it seemed to just be something that the organisation did and did well.

In the literature review it was mentioned that organisations create the impression through marketing initiatives that they have certain abilities and expertise. If leveraged well the organisation can become known for a specific ability (Aaker, 2004b). Tsogo Sun has turned its internal purpose: *We create great experiences,* into an external endorsement: *Another Tsogo Sun Experience*. The respondents often referred to this as something that aligned the organisation, both internally and externally. Communicating this specific component of the corporate brand well can positively impact the corporate brand. In the case of Tsogo Sun, *great experiences* are an example of how the organisation wants to communicate its ability or expertise. When having a *great experience,* guests are satisfied. Guest satisfaction is a result of a positive engagement between an organisation, albeit it through its products and services and a guest's expectations (Churchill & Surprenant, 1982). Guest satisfaction has a direct positive influence on the corporate brand affecting corporate reputation (Anisimova, 2013).

Continuing to focus on *great experiences* to align and market the organisation could prove to be very useful for Tsogo Sun and more so as the foundations are already in place.

Despite the fact that all the respondents had a good understanding of the corporate brand and what it comprised of, nobody indicated any efforts by the organisation to identify and understand exactly how these factors influenced it, a vital step in the corporate brand management process. Understanding what the factors are that influence the corporate brand is of particular importance in an organisation such as Tsogo Sun with a relatively new corporate brand, where some of the product brands could be considered corporate brands in themselves. This shortcoming in the corporate brand management strategy could inhibit the growth of the corporate brand into the future as management have not mapped out a clear growth path for the corporate brand, considering all its components.

5.3. CONCLUSION TO QUESTION 1

The move to branding an organisation as opposed to only its products is, in part, a result of shortening lifecycles of products within the organisation. This, together with the insight that communicating to all stakeholders as opposed to only the consumer, has benefits to both the business and the bottom line (Hatch & Schultz, 2009).

Further to the research on Tsogo Sun, it can be concluded that, in practice, a corporate brand within a company comprising multiple corporate brands can adopt the theoretical definition of corporate branding. Although the composition of the factors that make up the corporate brand will vary from organisation to organisation and will change over time, the research has revealed that they are all relevant and sufficient.

What has become evident from the interviews, and not found in the theory, is that organisations such as Tsogo Sun have no guidelines when trying to identify which brands in the portfolio contribute to the corporate brand and by how much.

Knowing this will allow them to manage both the corporate brand and the respective product brands more effectively.

5.4. DISCUSSION PERTAINING TO THE UNDERSTANDING OF A CORPORATE BRAND PORTFOLIO AND THE BEST WAY TO STRUCTURE IT IN ORGANISATIONS SUCH AS TSOGO SUN

Question 2:

What is a corporate brand portfolio and what is the best way to structure it?

If the corporate brand strategy is managed effectively, it could lead to increased sales and profitability of the organisation, a reduction in costs together with a well perceived brand image in the market (Shahri, 2011). For this reason, organisations such as Tsogo Sun will directly benefit from obtaining an answer to the second research question.

Every one of the ten respondents was positive about the recent rebrand at Tsogo Sun which resulted in cleaner brand architecture and the application of a common endorsement, both through the sunburst symbol and the written endorsement: *Another Tsogo Sun Experience*. A brand portfolio comprising brands with attribute compatibility refers to brands that have features that link the individual brands together via experiences, as is the case with Tsogo

Sun (Chernev, 2005). Having a golden thread in the form of a common endorsement could result in shorter search time and speedier decision making by the guest (Liu & Hu, 2011). In the case of Tsogo Sun, it will also assist with alleviating confusion in terms of what the brand portfolio comprises – a concern raised by many respondents.

Optimising the structure of the corporate brand portfolio at Tsogo Sun is a process that will not happen overnight. Opinions in terms of how and what should be done were divided between respondents. Some stated that the corporate brand should be built first and foremost and that the product brands in the portfolio should take care of themselves, with a strong influence by the corporate brand. However others believed that if the product brands became too generic, the organisation would lose an integral part of what had contributed to its success to date.

Within corporate brand architecture, the corporate brand should be the strongest and therefore have the most brand equity (Hatch & Schultz, 2003; Ind, 1997). This is not the case at Tsogo Sun due to its corporate brand being a relatively new market facing brand. Tsogo Sun shares a similar challenge that Unilever had, in the sense that their respective brand portfolios comprise strong product brands that also happen to be corporate brands. Dove at Unilever and Montecasino or Southern Sun Hotels at Tsogo Sun are examples of such brands. These examples illustrate how the dichotomy between product brands and corporate brands are in many cases outdated (Malmelin & Hakala, 2009). Most corporate branding literature, despite it stating that there are different types of brand strategies and most companies adopt a combination of one or more of the strategies, does not provide clear guidelines as to how to treat product brands that are also corporate brands when deciding to follow a corporate brand strategy.

A corporate brand strategy exists in an attempt to create a monolithic brand name that ultimately represents all the products and services that an organisation has to offer when communicating to stakeholders (Xie & Boggs, 2006). When considering this statement from the literature review, accepting it would require an organisation such as Tsogo Sun to apply a rigorous brand management strategy in order to align the brands within the portfolio. Some brands appear to be too strong and others appear to be fairly weak. Interestingly enough, most respondents seemed to be very comfortable with the strong brands in the Tsogo Sun portfolio, with only one respondent strongly opposing the current lack of marketing particularly for the product brands in the hotel division.

When considering Muzellec and Lambkin's (2009) proposed classifications of the corporate brand portfolio as identified in the literature review, according to the interview responses, none apply completely to Tsogo Sun. However the "Business Brand" classification, stating that the corporate brand is not actively visible to guests when looking at the marketing of the product brand while still remaining a strong brand for specified stakeholders, seemed to be the most relevant.

Combining the insights of the above two theoretical statements, one promoting a corporate brand strategy with a monolithic approach and the second statement advocating the active marketing of the product brand to the guest, if true, then it can be derived that Tsogo Sun needs to manage its brand portfolio more effectively. Their aim should be, first and foremost to build the relatively new corporate brand; secondly to identify the experiences that create the golden thread across the portfolio to contribute to the monolithic approach, and thirdly to apply brand strategies for each of the product brands as well as the corporate brand in order for them to remain attractive to their respective stakeholders.

5.5. CONCLUSION TO QUESTION 2

From the above discussion comprising aspects of the literature review as well as interview responses, it is accepted that a corporate brand portfolio comprises multiple brands of various natures with the strongest brand being the corporate brand. The portfolio can be optimised by actively managing each of the brands in the portfolio; considering the respective stakeholder needs as well as the golden thread between the brands, but at the same time ensuring that the balance between the brands and their role in the portfolio remains in place. The active management of the brands includes identifying criteria to ascertain when a brand in the portfolio is too strong or too weak and implementing a plan to align it in order to fulfil its role in the portfolio optimally.

5.6. DISCUSSION AROUND THE OWNERSHIP AND SCALE OF THE CORPORATE BRAND MANAGEMENT FUNCTION

Question 3:

Who owns the corporate brand management function and what is the scope of decision-making?

This is a very common question within the area of corporate branding and even though the literature is quite consistent in providing guidelines as to how to structure the organisation to support the corporate brand, and where the management of the corporate brand function should be located (Hatch & Schultz, 2009), the reality is that in practice it almost always becomes a bit more complicated.

The second part of the question in terms of the scope of corporate brand decision making lies in the fact that the literature has highlighted the fact that the lines between the corporate brand and the other brands in most organisations are blurred. The reasons for this vary (Balmer, 2008; Muzellec & Lambkin, 2009; Shahri, 2011). Tsogo Sun is no different and for that reason, it is very difficult to identify the scope of the corporate brand management function without considering the role and status of the product brands.

Most of the respondents highlighted a couple of strong product brands; most consistently Montecasino and Southern Sun Hotels. These product brands have, in themselves, corporate brand characteristics when considering the definition of a corporate brand in that they have multiple stakeholders and strong corporate identities (Balmer, 2008). A guideline in terms of how best to manage the strong product brands in the portfolio in an effort to ensure that each brand receives the support it requires to maximise the strength of the corporate brand could be useful for Tsogo Sun.

In terms of the first part of the question, around ownership of the corporate brand, the literature seems to be quite consistent in stating that it lies with the CEO; however that the actual function is fulfilled by corporate communication, which, depending on the organisation, is either centrally located or a function of marketing (Balmer, 2008; Balmer & Greyser, 2003; Shahri, 2011; Uggla, 2006).

From the interviews it was apparent that most senior executives did not see the need for a corporate communications department and that most of the corporate branding decisions were made by the CEO. Some felt that this put too much responsibility in the hands of the CEO, despite the fact that most acknowledged that it was currently working well. It was however clear that the corporate brand strategy, albeit it existing in the mind of the CEO, was not

clearly communicated throughout the organisation. This could potentially mean that the marketing department becomes order takers from the CEO based on his strategic business objectives, as marketing does not have an overview of the business. Furthermore, internal communications is a central function reporting into Human Resources with a very informal relationship with the Marketing department.

The fact remains that most of the literature (Harris & De Chernatony, 2001; Hatch & Schultz, 2009; Uggla 2006) supports the fact that the day to day management of the corporate brand happens as a function of marketing but that it requires access to the overall business strategy, which necessitates close relationships with many key individuals across the organisation.

A potential way to overcome this is to have marketing prepare a corporate brand strategy, considering the CEO's key business objectives, in discussion with all other departments that directly affect stakeholder relationships. This could then become the framework against which all branding decisions are made and communicated, considering all stakeholders affected. The framework should be clear, yet flexible as it is very difficult to define exactly where the corporate brand starts and ends in practice as its role can change depending on the business objective (Aaker, 2004b; Strebinger, 2014). It should also be linked to the allocation of financial and physical resources as identified by Balmer (2001b).

5.7. CONCLUSION TO QUESTION 3

The interview responses and the literature supported the view that the CEO was the owner of the corporate brand. The discussion revealed that, despite the literature stating that the scope of corporate brand decision making being across the organisation, the Marketing department, as the implementers of the strategy at Tsogo Sun, did not have a clear view across the

organisation. They were not directly involved in the creation and implementation of the core values of the organisation, which is an integral part of corporate branding strategy (Kotler, 2003). This structure could impact the corporate brand strategy and is compounded by the fact that there is no formalised relationship between for example, Internal Communications who directly communicate to a key stakeholder component. With this insight, a framework is offered to formalise the relationship and the flow of communication to all stakeholders affected by the corporate brand.

5.8. DISCUSSION OF THE PRIORITISATION OF THE BRAND MANAGEMENT PROCESSES

Question 4:

What identity gaps must the corporate brand management process close and how do organisations identify what needs to be done?

The literature review states that the corporate brand can be leveraged to positively impact performance, but in order for this to happen all stakeholders need to have fairly consistent views of the brand (Harris & De Chernatony, 2001). This involves the careful management of all the brand components, starting with the vision and including the translation of brand values.

Using this as a starting point in prioritising what needed to be done, and considering the responses from those interviewed, all had positive views about the clear set of brand values that span Tsogo Sun and its role in aligning stakeholders. There was no mention of the vision by the respondents, but other documentation revealed this to be: Our vision is to provide the

greatest possible variety of quality hospitality, leisure, gaming and entertainment experiences at each of our destinations (Tsogo Sun Brand Key, 2012).

What emerged through the literature and the interviews is that it was unclear to what extent employees needed to adopt the values of the brand in which they operate, and how much influence the corporate brand should have. This area of lack of clarity needs to be addressed as, despite the fact that a corporate brand strategy could be beneficial, the lack of management thereof could negatively impact both the organisation's product and corporate brands (Shahri, 2011).

Another factor that needs to be considered when identifying what has to be done and in which priority, is the guests' view of Tsogo Sun and how their view affects their opinion of the product brands in the portfolio (Shahri, 2011). Tsogo Sun has done ad hoc consumer research in this regard and they also have a very effective guest satisfaction tracking tool which takes the form of a post visit survey sent to all guests of hotels, casinos and restaurants which encourages each guest to give feedback on their latest visit. These results were made available for this piece of research and revealed that in most cases guests were aware of the fact that the product brand that they visited was a part of Tsogo Sun. Interesting to note was that often guests that had a very bad experience would state in the comments section of the post stay survey that they did not expect that level of service of a Tsogo Sun establishment. Most exceptionally good comments attributed their great experience to the actual delivery within the product brand.

What did seem unclear across both sets of research, and which was affirmed by the Tsogo Sun respondents interviewed, was exactly which brands made up the Tsogo Sun brand portfolio. According to the literature, one of key roles of the corporate brand manager is to

actively manage the brand portfolio. As product markets constantly evolve, it is the corporate brand manager's responsibility to seek opportunities and make recommendations in terms of changes, additions or reductions of brands (Aaker & Joachimstahler, 2000). The respondents all supported this role; however some believed that currently the product brands did not have clear enough brand strategies or sufficient support in maintaining and building these brands. The Tsogo Sun Integrated Annual Report (2015) stated that most marketing support revolved around retail campaigns and promotions for all the product brands as well as sponsorships and partnerships that promote the corporate brand, Tsogo Sun. Very little support was given to building the product brands or communicating the actual size and scale of the Tsogo Sun brand portfolio.

Two respondents felt that the corporate brand management focus should be to first and foremost build the Tsogo Sun brand – and, according to them, the rest would follow. It is true that a strong corporate brand strategy with a visible corporate brand will make the brand portfolio management process less painful (Aaker, 2004a). However, as seen from the results of the feedback from Tsogo Sun guests, poor product brand experiences impact the corporate brand directly and, for that reason, the product brands should be managed as a component of the corporate brand strategy. The number of resources allocated to the management of each brand in the portfolio should be driven by the corporate brand strategy.

In essence, considering the above discussion, the corporate brand manager's role requires good relationships with internal stakeholders to allow for clear and consistent messages to the various teams operating centrally, as well as in the other brands in the portfolio in an effort to close the gap between the actual brand identity and the intended brand identity (Harris & de Chernatony, 2001; Mitchell, 1997). This ongoing process in search of congruency in an effort

to build a coherent intended brand identity lies at the centre of corporate brand strategy and will ultimately lead to consistent, on brand external communication (Abratt, 1989).

5.9. CONCLUSION TO QUESTION 4

Identifying and prioritising what needs to be done to build the corporate brand starts with a good understanding of the brand portfolio. This understanding is based on contributions from all stakeholders, both internal and external and for this reason, the emphasis on good relationship skills, as mentioned in the discussion, cannot be underestimated. These good relationships will prove useful when considering the fact that the internal executives were not in agreement in terms of the correct level of support for each of the brands within the portfolio.

The answer to this question lies in listing each of the brands in the portfolio and then firstly identifying their strength based on a common set of attributes, which could include heritage, revenue, location, size, association with corporate brand etc. Secondly each brands marketing spend and allocation of spend - whether or not the contribution was for retail campaigns or for brand building, should be considered. Thirdly a collection of core brands should be identified – core brands should be the brands that have strong brand equity and that, if managed correctly, could directly contribute to the strength of the corporate brand.

Based on the results of the listing, the corporate brand management process could then identify and prioritise what needs to be done to optimise the Tsogo Sun brand portfolio.

5.10. SUMMARY OF THE RESULTS

The research has reaffirmed the role and importance of a corporate brand strategy and the fact that many organisations that have adopted it, have benefitted from the decision. Tsogo Sun has recently embarked on a corporate branding strategy and, although positive results are already evident, there are still some things that can be done to optimise the process.

The adoption of a corporate brand strategy which came at the same time as the organisation's public listing and an internal merger on the back of a successful external merger compounded the complexity of implementing the strategy. When considering this, together with the fact that a corporate brand is flexible, it becomes clear that organisations such as Tsogo Sun could benefit from a framework against which corporate branding decisions can be made. The framework should support the growth of the corporate brand, Tsogo Sun, in an effort to ensure that it becomes and remains the strongest brand in the portfolio. This should be done by dedicated corporate branding efforts with sufficient support in the realm of the product brands.

This process is not static and would need to be actively managed by a dedicated resource team, which could be located in marketing, but which has a view of the entire organisation. They would have to be able to build and maintain good relationships with both internal and external stakeholders in an attempt to align the current brand delivery with the intended brand promise, in an effort to provide information to ensure authentic and consistent external communication.

Identifying where to start and what needs to be done in terms of building and managing the corporate brand is guided by the brand portfolio and a clear understanding of the role of each of the brands in the portfolio and their contribution to the growth of the corporate brand.

6. CONCLUSIONS AND RECOMMENDATIONS

6.1. INTRODUCTION

This chapter reviews the conclusions of this study in relation to the literature review presented in Chapter 2. It examines how organisations with a multi-brand portfolio, comprising of multiple corporate brands, follow a corporate brand strategy in practice, compared to the theory and research presented by previous studies.

The purpose of this study was to identify such an organisation and provide it with a framework that would assist it to prioritise and make corporate branding decisions. Tsogo Sun was identified as a case study. With this in mind, four research questions were developed to guide the study in an attempt to gain rich and insightful information from a small sample of carefully selected executives that represented the organisation and their stakeholders.

The study wanted to gain answers to the questions in order to establish what the corporate brand comprised in practice in an organisation with multiple corporate brands; what the best way would be to structure the brand portfolio and then how to identify what needed to be done to manage the portfolio and who was responsible for doing the work.

To conduct the study, the literature review formed a basis to test how the theory revealed itself in practice by asking broad research questions based on the content of Chapter 2.

6.2. CONCLUSIONS OF THE STUDY

The research conducted showed that most of the theory presented in the literature review was verified in the study.

It appeared, however, that in practice the theory was sometimes too purist with practitioners often having to apply a hybrid of approaches or merge more than one theoretical classification in order for the theory to be useful. With this in mind, a framework was developed to assist organisations such as Tsogo Sun with a portfolio of multiple corporate brands to manage their corporate brand strategy more effectively. The ultimate purpose was to ensure that the corporate brand became the strongest brand in the portfolio and the product brands were optimised to be strong in itself, while at the same time supporting the corporate brand.

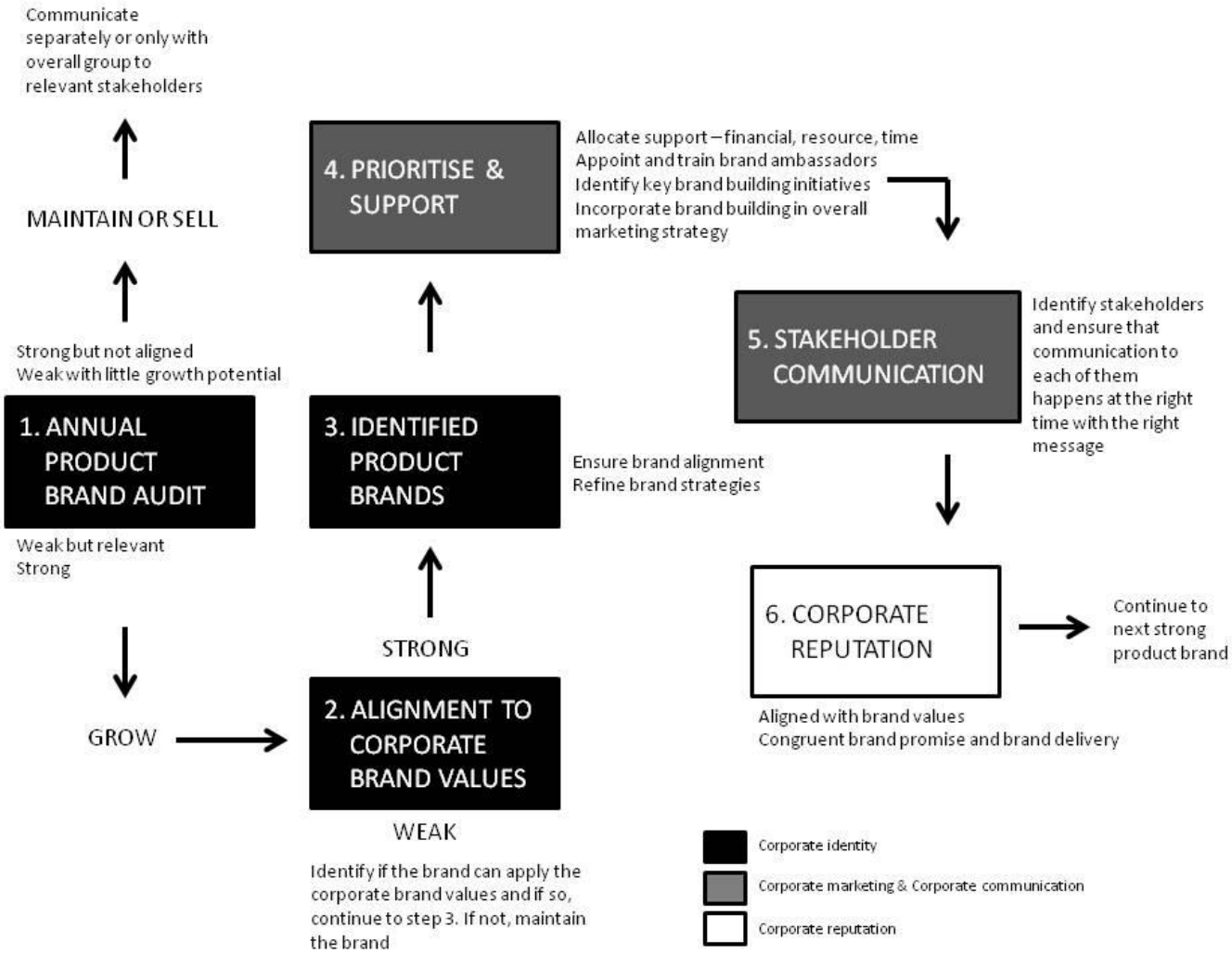

Figure 15 - Corporate Brand Management process in practice (larger under Appendix I)

The framework is based on the results from the research which concluded that a well positioned, empowered corporate brand manager with a view across the business is an integral part of the implementation of a corporate brand strategy within an organisation. With this in mind, the framework should guide the way in which the corporate brand manager approaches his or her function. The first step in the model requires the corporate brand manager to conduct an annual audit of each brand within the brand portfolio, starting with the corporate brand, and consider its status. Based on the results of the audit and the brand's strength, the brand can either be maintained or sold or identified for growth. The next step

would be to check if the brands identified for growth support the corporate brand values. If they do or have the potential to do so, they should be earmarked for careful management under a corporate brand strategy as supporting and growing these brands will directly impact the corporate brand and by underpinning the corporate brand values there will be a golden thread linking each brand. Weak brands, or brands that are unable to support the corporate brand values should be maintained and given relevant support to ensure that they continue to drive revenues or sold off, but they should not be incorporated into the corporate brand strategy.

In step 3, the identified brands should either relook or refine their brand strategy to ensure that the growth of the brand is aligned to the corporate brand strategy and that there is a strong enough endorsement of the corporate brand in the corporate identity of the product brand. The level of endorsement will depend on the organisational strategy. Step 3 marks the end of the corporate identity phase.

With this in mind, the model moves to step 4 - the corporate marketing phase where resources are allocated to support and grow the brand. This includes the identification and training of brand ambassadors. This step also involves the preparation of a strong marketing and communications plan which forms part of the overall brand strategy. This will allow the brand to communicate with a clear and consistent message to all the relevant stakeholders. During this phase the timing of the communication is important as certain stakeholders need to be engaged before others in order to ensure buy-in and support.

As the message is thought-through, planned and aligned to the corporate brand strategy, it should ensure a favourable corporate reputation, which would lead to step 6 and the final phase of the corporate branding cycle. This process is repeated until all brands have been considered and prioritised according to the corporate brand strategy of the organisation.

When applying the framework for each brand within the Tsogo Sun portfolio, one could consider using a table as per the below example used for Montecasino. Montecasino is one of Tsogo Sun' strongest brands and it supports all of the corporate brand values, as shown in the table. The table is a snapshot that can be used to motivate for changes in the brand portfolio at a strategic level.

Table 30 - An example of the application of Figure 15 at Tsogo Sun's Montecasino

BRAND STATUS	ALIGNMENT TO CORPORATE BRAND VALUES					SUPPORT	STAKEHOLDERS	CORPORATE REPUTATION
Strong/weak with potential	Leaders	Energy	Passion	Variety	Seductive	Main support required to ensure growth	List key stakeholders	Contribution to corporate reputation
Strong	x	x	x	x	x	Align product brand strategy to corporate brand strategy	Employees	Great experiences – aligned to brand purpose
						Appoint brand ambassadors	Board	Strong endorsement to corporate brand
						Marketing plan to include dedicated brand building support	Guests	Strong community involvement
							Community	
							Suppliers	
							Government	

6.3. RECOMMENDATIONS

The research objective was to understand the role and assess the decision making factors that determine corporate brand strategy within an organisation that has a multitude of corporate brands in its portfolio, and to provide a set of guidelines to allow these organisations to manage their corporate brand portfolio more effectively in practice.

Upon reviewing the research conducted in this study, this objective has been met and there are a number of stakeholders within organisations that could benefit from the recommendations that unfolded.

Recommendations for organisations:

Adopting a corporate brand strategy can have a multitude of benefits to an organisation as highlighted in the study. Most notably, it could allow for a strategic approach to the growth of the corporate brand, easier decision making due to a clear strategy and ultimately increased revenues due to a stronger corporate brand.

The research revealed that organisations that comprise a multi-brand portfolio and who are committed to adopting a corporate brand strategy need to understand that a corporate brand strategy is not a marketing strategy – it is a business strategy and as such the corporate brand management process should be positioned as a central part of the organisation's strategy for success. The day to day role of the corporate brand manager remains however a function of the marketing department.

Further to the positioning of the corporate brand management role the successful adoption of a corporate brand strategy would require a commitment to allocate the necessary resources, as

indicated in the proposed framework. These resources include human, time and financial resources.

In terms of corporate communication to stakeholders, a one size fits all approach is not necessarily optimal and organisations should consider different types of communications messages and mediums to best reach the targeted stakeholders at the right time. This could mean that one change in the business could be communicated in a number of different ways in order to have the best result.

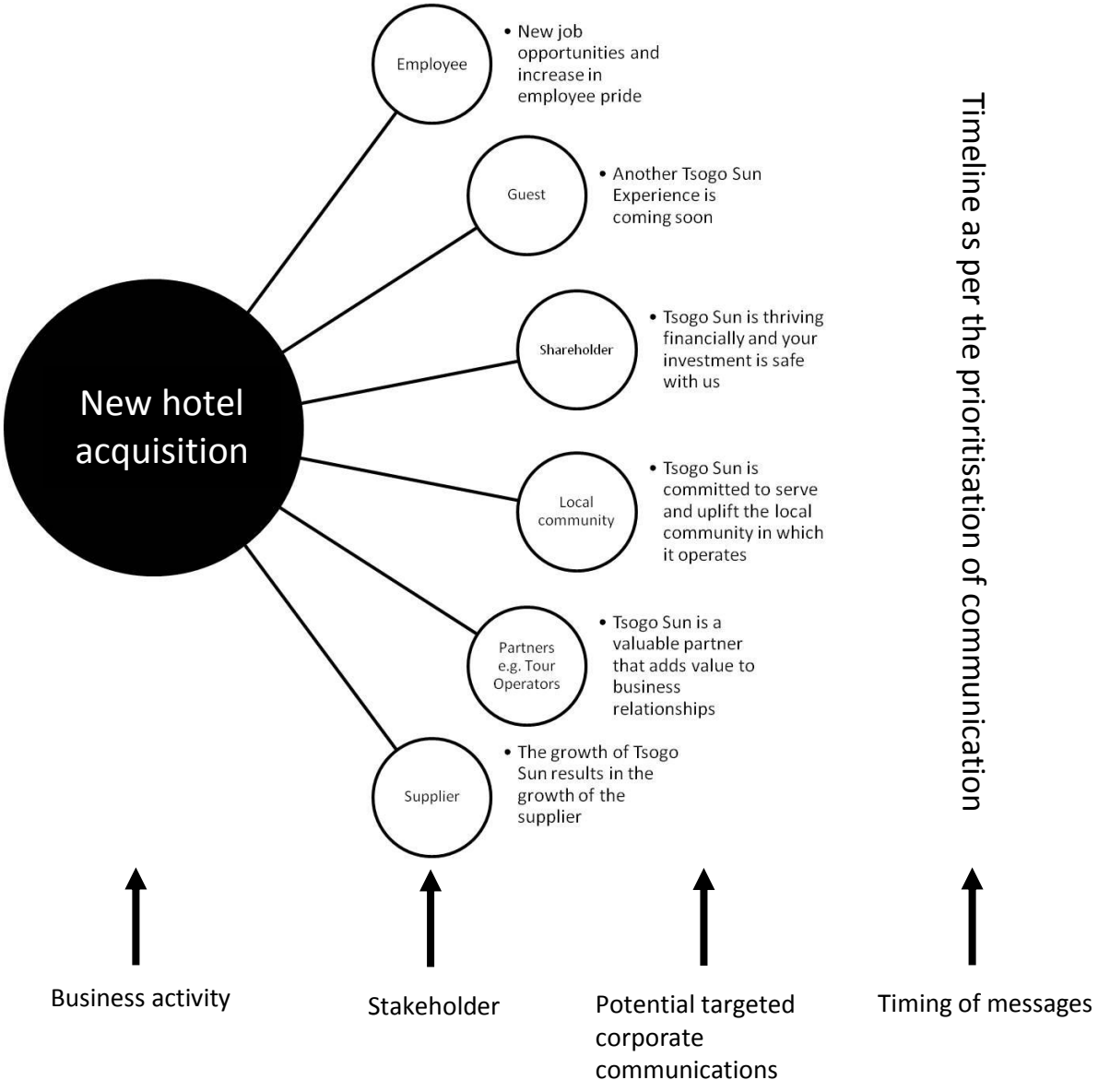

Figure 16: An example of targeted corporate communication to stakeholders of Tsogo Sun

6.4. SUGGESTIONS FOR FURTHER RESEARCH

From the research it is unclear if how to treat product brands that display characteristics of corporate brands within an organisation that follows a corporate brand strategy and what the business strategy should be to manage them.

Another area that emerged as a potential for further research is in the area of corporate identity. There appears to be no comprehensive instrument that measures corporate identity. This could be a useful tool in managing the corporate brand even better.

The literature review revealed that it is also not clear to what extent the employee brand influences the corporate brand, although it is known that it does, as suggested by Balmer as presented at Corporate Branding Symposium held in Cape Town on 24 July 2014.

A final area for potential further research that emerged from the study is that the literature seemed to refer to brand identity and corporate identity interchangeably and there is no literature clearly defining what the differences are, and if, in fact, there are differences.

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APPENDICES

APPENDIX A – CONSISTENCY MATRIX

RESEARCH PROBLEM: An evaluation and analysis of corporate branding and corporate brand management within an organisation comprising multiple corporate brands, arising from the fact that management do not know what exactly comprises the corporate brand in practice and who is responsible for corporate branding decisions. It is also unclear how the various corporate brands influence each other. This includes the basis on which decisions are made as well as the scope of their influence.					
Sub problems	**Literature review**	**Research Question**	**Source of data**	**Type of data**	**Analysis**
Sub problem 1: It is unclear what exactly comprises the corporate brand in practice. The absence of clarity can result in bad decision-making as management are unaware of the factors that influence the corporate brand. This has an impact on corporate reputation.	• Aaker (2004a, 2004b) • Abratt & Kleyn (2012) • Abratt (1989) • Anisimova (2013) • Balmer (1995, 2001a, 2001b, 2008, 2012) • Balmer & Wilkinson (1991) • Bendixen & Abratt (2007) • Bick, Jacobson & Abratt (2003) • Biehal & Sheinin (2007) • Churchill & Surprenant (1982) • Dacin & Brown (2002) • De Ruyter & Wetzels (2000) • Devasagayam, Buff, Aurand & Judson (2010) • Dowling (2001) • Eisenhardt & Martin (2000) • Fombrun & Rindova (1996) • Harris & De Chernatony (2001) • Hatch & Schultz (2001, 2003) • Hemsley (1998) • Hillenbrand and Money (2007) • Kay (1993) • Maathuis & van Bruggen (1998) • Malmelin & Hakala (2009) • Mangold & Miles (2007) • Melewar & Jenkins (2002) • Muzellec & Lambkin (2009) • Roberts & Dowling (2002) • Schneider & Bowen (1985) • Souiden, Kassim & Hong (2006)	***Question 1:*** What comprises the corporate brand in a company with multiple brands?	• A general purposive sample of subjects participating in an in depth, structured interview • Case studies • Journal articles • Tsogo Sun transcripts	Qualitative data	• Transcribing narrative interviews • Coding of keywords from open ended questions • Categorisation of data • Identification of key themes • Triangulation of data

	• Tarnovskaya, Elg & Burt (2008) • Urde (2003, 2013) • Van Riel (1992) • Van Riel & Balmer (1997)				
***Sub problem 2*:** The rationale for adopting a corporate branding strategy is not always well thought through as it is often is a result of business decisions made during mergers or acquisitions or over a period of time. Due to this, management are unaware of what exactly is required to manage a corporate brand portfolio comprising multiple brands that might not always have been strategically developed.	• Aaker (2004a, 2004b) • Argenti & Druckenmiller (2004) • Carlotti (2004) • Chailan (2008, 2009) • Chun & Davies (2006) • Cravens, Piercy & Prentice (2000) • DeChernatony (2012) • Hatch & Schultz (2003, 2009) • He & Balmer (2006) • Ind (1997) • Kapferer (2002) • Keller (1998) • Kumar (2003) • Mann & Kaur (2013) • Melawar & Walker (2003) • Morgan & Rego (2009) • Muylle, Dawar & Rangarajan (2012) • Muzellec & Lambkin (2009) • Petromilli, Morrison & Million (2002) • Pierce & Moukanas (2002) • Rao, Agrawal, & Dahlhoff (2004) • Shahri (2011) • So, Parsons & Yap (2013) • Strebinger (2014) • Uggla (2005; 2006) • Van Riel & Bruggen (2002) • Varadarajan, DeFanti & Busch (2006) • Xie & Boggs (2006)	***Question 2:*** What is a corporate brand portfolio and what is the best way to structure it?	• A general purposive sample of subjects participating in an in depth, structured interview • Case studies • Journal articles • Tsogo Sun transcripts	Qualitative data	• Transcribing narrative interviews • Coding of keywords from open ended questions • Categorisation of data • Identification of key themes • Triangulation of data

Sub problem 3: Organisations do not understand where corporate branding decisions start or end. For this reason, the role of the corporate brand manager is unclear and often not optimised. This makes it very difficult to ascertain the work that needs to be done to build the respective brand brands, including the corporate brand, in the portfolio.	• Aaker & Joachimstahler (2000) • Aaker (2004a, 2004b) • Abratt (1989) • Balmer (2001a, 2001b, 2005, 2008, 2012) • Balmer & Greyser (2003) • Balmer & Wilkinson (1991) • Harris & de Chernatony (2001) • Hatch & Schultz (2003, 2009) • Ind (1997) • Kotler (2003) • Mitchell (1997) • Muniz & O'Guinn (2001) • Muzellec & Lambkin (2009) • Shahri (2011) • Strebinger (2014) • Uggla (2006) • Urde (2003)	***Question 3:*** Who owns the corporate brand management function and what is the scope of decision making? ***Question 4:*** What identity gaps must the corporate brand management process close and how do organisations identify what needs to be done?	• A general purposive sample of subjects participating in an in depth, structured interview • Case studies • Journal articles • Tsogo Sun transcripts	Qualitative data	• Transcribing narrative interviews • Coding of keywords from open ended questions • Categorisation of data • Identification of key themes • Triangulation of data

APPENDIX B – PERMISSION TO CONDUCT RESEARCH

Louise Sevel

86 Westmeath Road
Parkview
2193
011-4860061

3 September 2013

ATTENTION: Marcel von Aulock
CEO of Tsogo Sun

Dear Marcel

PERMISSION TO USE TSOGO SUN AS A CASE STUDY FOR MMSM RESEARCH AND ACCESS TO INTERVIEWS WITH SENIOR EXECUTIVES

As you are aware, I am currently completing my masters' degree at Wits Business School. It has been a very constructive course which has benefitted me tremendously.

The time has come for me to submit my research proposal and before I do so, I would like to ask your permission to use Tsogo Sun as a case study. My research topic is: The Role of Corporate Branding within an Organisation, however it might be refined after presenting my proposal to the panel next month.

Gaining access would require me to interview most of your senior executives, including yourself. The interviews will be about one hour long and will not put any member of management in a compromising position as I will not require any sensitive information to be divulged in order to answer my research questions.

As you know, I pride myself in my work ethic and I will apply the same principles during the research process. I would also like to offer you access to my research during and after completion.

I look forward to hearing from you.

Sincerely

Louise Sevel

Approved.

APPENDIX C - RESEARCH INSTRUMENT

Discussion guide template as used in the data collection phase conducting in-depth interviews

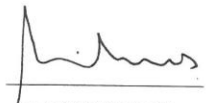
INTRODUCTION KEY COMPONENTS: • Thank you • My name • Purpose • Confidentiality • Duration • How the interview will be conducted • Opportunity for questions • Signature of consent	I want to thank you for taking the time to meet with me today. As you know, my name is Louise Sevel and I would like to talk to you about your experience, particularly relating to changes within the space of branding at Tsogo Sun over the past couple of years. I am particularly interested in the area of corporate branding and how a company such as Tsogo Sun manages multiple corporate brands. The interview should take about one and a half hour. I will be audio-taping the session because I don't want to miss any of your comments. Although I will be taking some notes during the session, I am unable to write fast enough to get it all down. Because we are on tape, please be sure to speak up so that we don't miss your valuable comments. All responses will be kept confidential. This means that your interview responses will only be shared with research team members and we will ensure that any information we include in our report does not identify you as the respondent. Remember, you don't have to talk about anything you don't want to and you may end the interview at any time. Having said this, the questions are generally not sensitive and should generate some great conversation. Are there any questions about what I have just explained? Are you willing to participate in this interview? _____ _____ _____ PARTICIPANT DATE INTERVIEWER

QUESTIONS: • No more than 15 open ended questions • Ask factual before opinion • Use probes as needed	1. Tell me how you have experienced the Tsogo Sun branding journey to date? 2. What do you consider to be the strongest branding initiative to date? 3. Which brand within the Tsogo Sun portfolio do you consider to be the strongest brand and why? 4. Following on from question 3, in what ways do you think this brand contributes and/or detracts from the Tsogo Sun brand? 5. How would you manage an organisation such at Tsogo Sun, with multiple corporate brands? PROMPTS: a. Would you remove/add brands? 6. What influences the reputation and associations of each of the brands? 7. How best could each of these brands be managed? 8. Whose responsibility would this be and why? 9. Symbols are an important part of branding. What symbols to you associate with at Tsogo Sun and why? 10. How do you believe the sunburst symbol influences the brands? 11. What do you believe is the relationship of the Tsogo Sun brand with each of the corporate brand? 12. How would the Tsogo Sun brand be affected by a factor negatively influencing a corporate brand's reputation? 13. Vice versa, how would a corporate brand be affected by a factor negatively influencing Tsogo Sun's reputation? 14. How can this process best be managed? 15. Who should ultimately be responsible for the management of brands at Tsogo Sun?
CLOSING KEY COMPONENTS: • Additional comments • Next steps • Thank you	Is there anything more you would like to add? I'll be analysing the information you, and others gave me and submitting a draft report to the organisation within one month. I'll be happy to send you a copy to review at that time, if you are interested. Thank you for your time.

APPENDIX D - SIGNED CONSENT FORMS FROM PARTICIPANTS

RESEARCH INSTRUMENT

Discussion guide template as used in the data collection phase conducting in-depth interviews

INTRODUCTION KEY COMPONENTS:	I want to thank you for taking the time to meet with me today. As you know, my name is Louise Sevel and I would like to talk to you about your experience, particularly relating to changes within the space of branding at Tsogo Sun over the past couple of years. I am particularly interested in the area of corporate branding and how a company such as Tsogo Sun manages multiple corporate brands. The interview should take about one and a half hour. I will be audio-taping the session because I don't want to miss any of your comments. Although I will be taking some notes during the session, I am unable to write fast enough to get it all down. Because we are on tape, please be sure to speak up so that we don't miss your valuable comments. All responses will be kept confidential. This means that your interview responses will only be shared with research team members and we will ensure that any information we include in our report does not identify you as the respondent. Remember, you don't have to talk about anything you don't want to and you may end the interview at any time. Having said this, the questions are generally not sensitive and should generate some great conversation. Are there any questions about what I have just explained? Are you willing to participate in this interview?  PARTICIPANT DATE INTERVIEWER

- Thank you
- My name
- Purpose
- Confidentiality
- Duration
- How the interview will be conducted
- Opportunity for questions
- Signature of consent

RESEARCH INSTRUMENT

Discussion guide template as used in the data collection phase conducting in-depth interviews

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RESEARCH INSTRUMENT

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• Thank you • My name • Purpose • Confidentiality • Duration • How the interview will be conducted • Opportunity for questions • Signature of consent	

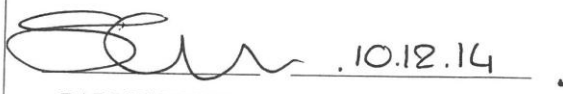
RESEARCH INSTRUMENT

Discussion guide template as used in the data collection phase conducting in-depth interviews

INTRODUCTION KEY COMPONENTS:	I want to thank you for taking the time to meet with me today. As you know, my name is Louise Sevel and I would like to talk to you about your experience, particularly relating to changes within the space of branding at Tsogo Sun over the past couple of years. I am particularly interested in the area of corporate branding and how a company such as Tsogo Sun manages multiple corporate brands. The interview should take about one and a half hour. I will be audio-taping the session because I don't want to miss any of your comments. Although I will be taking some notes during the session, I am unable to write fast enough to get it all down. Because we are on tape, please be sure to speak up so that we don't miss your valuable comments. All responses will be kept confidential. This means that your interview responses will only be shared with research team members and we will ensure that any information we include in our report does not identify you as the respondent. Remember, you don't have to talk about anything you don't want to and you may end the interview at any time. Having said this, the questions are generally not sensitive and should generate some great conversation. Are there any questions about what I have just explained? Are you willing to participate in this interview? Steve Harvell 4/12/14 _____ PARTICIPANT DATE INTERVIEWER
• Thank you • My name • Purpose • Confidentiality • Duration • How the interview will be conducted • Opportunity for questions • Signature of consent	

RESEARCH INSTRUMENT

Discussion guide template as used in the data collection phase conducting in-depth interviews

INTRODUCTION KEY COMPONENTS: • Thank you • My name • Purpose • Confidentiality • Duration • How the interview will be conducted • Opportunity for questions • Signature of consent	I want to thank you for taking the time to meet with me today. As you know, my name is Louise Sevel and I would like to talk to you about your experience, particularly relating to changes within the space of branding at Tsogo Sun over the past couple of years. I am particularly interested in the area of corporate branding and how a company such as Tsogo Sun manages multiple corporate brands. The interview should take about one and a half hour. I will be audio-taping the session because I don't want to miss any of your comments. Although I will be taking some notes during the session, I am unable to write fast enough to get it all down. Because we are on tape, please be sure to speak up so that we don't miss your valuable comments. All responses will be kept confidential. This means that your interview responses will only be shared with research team members and we will ensure that any information we include in our report does not identify you as the respondent. Remember, you don't have to talk about anything you don't want to and you may end the interview at any time. Having said this, the questions are generally not sensitive and should generate some great conversation. Are there any questions about what I have just explained? Are you willing to participate in this interview?  .10.12.14 PARTICIPANT DATE INTERVIEWER

RESEARCH INSTRUMENT

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RESEARCH INSTRUMENT

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RESEARCH INSTRUMENT

Discussion guide template as used in the data collection phase conducting in-depth interviews

INTRODUCTION KEY COMPONENTS:	I want to thank you for taking the time to meet with me today. As you know, my name is Louise Sevel and I would like to talk to you about your experience, particularly relating to changes within the space of branding at Tsogo Sun over the past couple of years. I am particularly interested in the area of corporate branding and how a company such as Tsogo Sun manages multiple corporate brands.
• Thank you • My name • Purpose • Confidentiality • Duration • How the interview will be conducted • Opportunity for questions • Signature of consent	The interview should take about one and a half hour. I will be audio-taping the session because I don't want to miss any of your comments. Although I will be taking some notes during the session, I am unable to write fast enough to get it all down. Because we are on tape, please be sure to speak up so that we don't miss your valuable comments. All responses will be kept confidential. This means that your interview responses will only be shared with research team members and we will ensure that any information we include in our report does not identify you as the respondent. Remember, you don't have to talk about anything you don't want to and you may end the interview at any time. Having said this, the questions are generally not sensitive and should generate some great conversation. Are there any questions about what I have just explained? Are you willing to participate in this interview? PARTICIPANT _____ DATE _____ INTERVIEWER

APPENDIX E - NOTES MADE DURING INTERVIEWS

Contact Summary Sheet

Contact type: Face to face interview

Contact date: 21 November 2014

Participant: [redacted]

Site: Tsogo Sun Head Office

Interviewer: Louise Sevel

What were the main issues or themes that struck me in the interview?

As the [redacted] plays a central role in decision making. He has a strong hotel background. He spoke nostalgically about the hotel industry of the past, possibly a sign that operations have become more functional and less about serving the guest. Although he speaks authoritively, he has a humble approach.

Summarise the information gained on each of the discussion points	**Summary**
Most important branding journey	[redacted] been in the company for over 30 years and he believes the strongest brand initiatves to have been the securing of some top international brands in the eighties such as Intercontinental and Holiday Inn
Power of the sunburst	He completely believes in the power of the sunburst and the fact that it can stretch across divisions and categories of hotels from budget to ultra luxury
Custodian of corporate branding decisions	CEO
Other important observations	

Anything else that struck me as salient, interesting, illuminating or important in this contact?

No

What new questions did arise from this interview?

None

Interviewer: Louise Sevel

Source: Miles & Huberman (1994)

Contact Summary Sheet

Contact type: Face to face interview

Contact date: 4 November 2014

Participant: [redacted]

Site: Tsogo Sun Head Office

Interviewer: Louise Sevel

What were the main issues or themes that struck me in the interview?

As the CEO, [redacted] has a strong influence on the corporate branding strategy. He believes in the power of each individual brand within the portfolio and wants each brand to have sufficient support and presence.

Summarise the information gained on each of the discussion points	**Summary**
Most important branding journey	The birth of Tsogo Sun as a corporate brand
Power of the sunburst	He completely supports the strategy to place the sunburst on all brands across the group
Custodian of corporate branding decisions	CEO
Other important observations	

Anything else that struck me as salient, interesting, illuminating or important in this contact?

No

What new questions did arise from this interview?

None

Interviewer: Louise Sevel

Source: Miles & Huberman (1994)

Contact Summary Sheet

Contact type: Face to face interview

Contact date: 20 November 2014

Participant: [redacted]

Site: Tsogo Sun Head Office

Interviewer: Louise Sevel

What were the main issues or themes that struck me in the interview?

[redacted] the Director of Marketing. She has a strong gaming background and discussions around branding are very functional. She is a strong proponent of building the Tsogo Sun corporate brand but also believes in the power of the big casino brands.

Summarise the information gained on each of the discussion points	**Summary**
Most important branding journey	The merger of gaming and hotels and the application of the sunburst on every property within the group
Power of the sunburst	It is evident that [redacted] believes that the sunburst is a powerful brand symbol
Custodian of corporate branding decisions	CEO and marketing
Other important observations	

Anything else that struck me as salient, interesting, illuminating or important in this contact?

No

What new questions did arise from this interview?

None

Interviewer: Louise Sevel

Source: Miles & Huberman (1994)

Contact Summary Sheet

Contact type: Face to face interview

Participant: [redacted]

Contact date: 3 November 2014

Site: Sandton Sun

Interviewer: Louise Sevel

What were the main issues or themes that struck me in the interview?

It was very clear in the interview that [redacted] in his role as CEO had a distinct vision for the Tsogo Sun brand and the steps required to position the brand. Simplicity seems to be his approach to business and to branding. [redacted] spoke confidently and without hesitation.

Summarise the information gained on each of the discussion points	**Summary**
Most important branding journey	The most recent merger of gaming and hotels, as envisioned and implemented by himself
Power of the sunburst	[redacted] believes in the power of the sunburst and its ability to stretch from the most budget to the most luxurious of properties. In his mind the sunburst equals experiences and it can be in any category
Custodian of corporate branding decisions	CEO
Other important observations	Tsogo Sun is the most important brand in the portfolio and should remain the brand that requires the most focus and marketing presence

Anything else that struck me as salient, interesting, illuminating or important in this contact?

No

What new questions did arise from this interview?

None

Interviewer: Louise Sevel

Source: Miles & Huberman (1994)

Contact Summary Sheet

Contact type: Face to face interview

Participant: [redacted]

Contact date: 4 December 2014

Site: Tsogo Sun Head Office

Interviewer: Louise Sevel

What were the main issues or themes that struck me in the interview?

[redacted] was previously the [redacted] of [redacted] and has a strong interest in people. He is now director of training and development for the group.

Summarise the information gained on each of the discussion points	**Summary**
Most important branding journey	Montecasino launch
Power of the sunburst	He is a strong proponent of the sunburst both as a market facing symbol and a recruitment symbol
Custodian of corporate branding decisions	Every employee is a brand ambassador
Other important observations	

Anything else that struck me as salient, interesting, illuminating or important in this contact?

No

What new questions did arise from this interview?

None

Interviewer: Louise Sevel

Source: Miles & Huberman (1994)

Contact Summary Sheet

Contact type: Face to face interview

Participant: [redacted]

Contact date: 10 December 2014

Site: Tsogo Sun Head Office

Interviewer: Louise Sevel

What were the main issues or themes that struck me in the interview?

[redacted] was very comfortable with the interview. Her roles at Tsogo Sun have spanned hotels and gaming and predominantly in [redacted]. She is a senior member of management and supports the recent merger completely, saying that it has made decision making simpler and easier for everyone.

Summarise the information gained on each of the discussion points	**Summary**
Most important branding journey	Placing the sunburst on all properties across Tsogo Sun
Power of the sunburst	Supports this entirely
Custodian of corporate branding decisions	CEO
Other important observations	

Anything else that struck me as salient, interesting, illuminating or important in this contact?

No

What new questions did arise from this interview?

None

Interviewer: Louise Sevel

Source: Miles & Huberman (1994)

Contact Summary Sheet

Contact type: Face to face interview

Participant: [redacted]

Contact date: 10 November 2014

Site: Tsogo Sun Head Office

Interviewer: Louise Sevel

What were the main issues or themes that struck me in the interview?

[redacted] heads up [redacted] and the entity and acts as second in charge of Tsogo Sun. He fulfills a very corporate role and his insights were very narrow, albeit supportive.

Summarise the information gained on each of the discussion points	**Summary**
Most important branding journey	The merger of gaming and hotels in 2012
Power of the sunburst	[redacted] supports the decision to apply the sunburst on every property in the group
Custodian of corporate branding decisions	CEO
Other important observations	

Anything else that struck me as salient, interesting, illuminating or important in this contact?

No

What new questions did arise from this interview?

None

Interviewer: Louise Sevel

Source: Miles & Huberman (1994)

Contact Summary Sheet

Contact type: Face to face interview

Participant: [redacted]

Contact date: 6 January 2015

Site: Tsogo Sun Head Office

Interviewer: Louise Sevel

What were the main issues or themes that struck me in the interview?

[redacted] is the MD of gaming. He supports the consolidation of hotels and gaming and believes in the power of the corporate brand and the Tsogo Sun brand portfolio.

Summarise the information gained on each of the discussion points	**Summary**
Most important branding journey	The most recent merger of gaming and hotels
Power of the sunburst	[redacted] is a proponent of the sunburst and believes that it has allowed for cross selling across divisions which was not easy in the past
Custodian of corporate branding decisions	Ulitmately the CEO, but supported by a strong team that manage stakeholder relationships
Other important observations	None

Anything else that struck me as salient, interesting, illuminating or important in this contact?

No

What new questions did arise from this interview?

None

Interviewer: Louise Sevel

Source: Miles & Huberman (1994)

Contact Summary Sheet

Contact type: Face to face interview

Contact date: 1 December 2014

Participant: Kevin Page

Site: Tsogo Sun Head Office

Interviewer: Louise Sevel

What were the main issues or themes that struck me in the interview?

Kevin has been with the group for more than 30 years and has seen many changes in management and strategies. He believes that the merger of hotels and gaming is probably the most important branding journey to date. He spoke confidently and authoritively on both business and brand and his views are highly respected

Summarise the information gained on each of the discussion points	**Summary**
Most important branding journey	The most recent merger of gaming and hotels as well as the shift in hotels from managing brands to owning brands
Power of the sunburst	Kevin completely believes in the power of the sunburst symbol
Custodian of corporate branding decisions	CEO and management team
Other important observations	

Anything else that struck me as salient, interesting, illuminating or important in this contact?

No

What new questions did arise from this interview?

None

Interviewer: Louise Sevel

Source: Miles & Huberman (1994)

Contact Summary Sheet

Contact type: Face to face interview

Contact date: 22 January 2015

Participant: Lindelwa [redacted]

Site: Tsogo Sun Head Office

Interviewer: Louise Sevel

What were the main issues or themes that struck me in the interview?

Lindelwa oversees the hotel marketing portfolio. She seems to be concerned that with the merger of hotels and gaming, the individual hotel brands have been neglected. It was interesting to hear this. She is a strong believer in brand standards and making the brand standards measurable.

Summarise the information gained on each of the discussion points	**Summary**
Most important branding journey	The implementation of brand standards within hotels that were measurable in terms of operations and tangible in terms of the guest experience
Power of the sunburst	Lindelwa believes in the sunburst, however, she does not believe that the sunburst should stretch from budget to ultra luxury, but rather play in the safe space between economy and luxury offerings
Custodian of corporate branding decisions	Corporate Branding Manager
Other important observations	According to Lindelwa there is a lack of consistent communication between integral departments

Anything else that struck me as salient, interesting, illuminating or important in this contact?

There is still a divide between gaming and hotels on senior management level with one division believing it is distinctly different to the other

What new questions did arise from this interview?

None

Interviewer: Louise Sevel

Source: Miles & Huberman (1994)

APPENDIX F - TSOGO SUN BRAND ARCHITECTURE

APPENDIX G - TSOGO SUN ADVERTISING

APPENDIX H - EXCERPT FROM TSOGO SUN INTEGRATED ANNUAL REPORT

31 March 2014

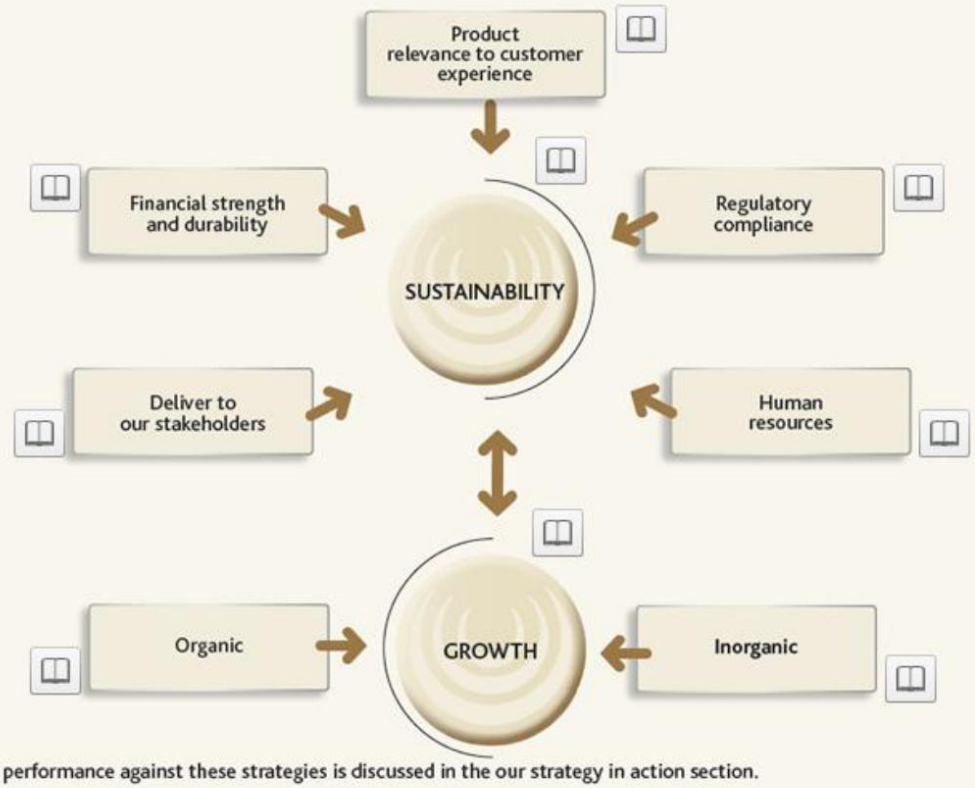
Our strategy

How we create long-term sustainable value

The key pillars of our sustainability include meeting the reasonable requirements of our stakeholders, financial strength and durability, maintaining product relevance to customer experience, regulatory compliance and adequate skilled human resources.

In summary, a business has to stay in business to be able to take advantage of the commercial opportunities that are presented to it. Good businesses fail when they are fragile, inflexible, unethical and/or poorly managed.

Representation of our strategy



Our performance against these strategies is discussed in the our strategy in action section.

The value of a business is the present value of the future cash flows that can be generated by the assets and other capitals owned or controlled. Accordingly, the only true measure of growth for our business over time is the growth in cash flow.

The capitals that generate these cash flows include physical assets such as property, plant and equipment and employees as well as intangible capitals such as licences, brands, trademarks, technology and systems supported by adequate financial capital to pursue growth opportunities and underpinned by quality relationships with key stakeholders. Execution of a robust strategy informed by and responding to material risks and opportunities will lead to optimal utilisation of capitals and generation of cash flow and ultimately value.

Growth in cash flows over time are generated through the optimal operation of the group's capitals or organic growth and building the tangible and intangible asset base of the group through developing and acquiring new businesses or inorganic growth.

While the use of cash flow as the primary measure of growth may appear mercenary, it is only with sustainable and growing cash flows that a business can hope to create value for the organisation, its stakeholders and society and thereby achieve a multitude of additional benefits such as increased levels of employment and meaningful social contributions.

Product relevance to customer experience

Tsogo Sun sells experiences including hospitality, gaming, dining and entertainment. To provide the variety and quality of experiences demanded by the group's various clientèle at the appropriate price points, the group needs to constantly monitor and invest in:

- physical product that caters to the customer – including hotel operating equipment, major and minor refurbishments to both hotel and entertainment complexes, gaming equipment, tenant allowances and mind and mood infrastructure to enhance customer experience;
- technology that works for the customer and makes the product work – including gaming management systems to ensure optimal gaming floor utilisation, guest facing and back-of-house hospitality systems for in-house facilities and reservations, channel and customer relationship management;
- accessibility that allows the customer to utilise the group's products with minimal barriers to entry – including physical facilities as simple as sufficient parking, accessibility for mobility-impaired guests, easy access to reservation systems and personnel for both trade and individual buyers and easy access to information on the group's products; and
- branding which is critical to the way in which the group is viewed by its current and prospective customers.

KEY PERFORMANCE INDICATORS

	2014	2013
Gaming		
Reward club membership contribution to gaming revenue	**71%**	63%
Slot machine average age	**5.3 years**	5.0 years
Guest satisfaction – gaming	**75%**	n/a
Hotels		
Reward club membership contribution to hotel revenue	**28%**	26%
Guest satisfaction – hotels	**87%**	86%

Hotel property audits	**No material deviations from brand standards**	No material deviations from brand standards
Hygiene audits	**No significant issues noted**	No significant issues noted
Maintenance capital spend	**R769 million**	R579 million

2014 PERFORMANCE

Product relevance

In order for the group to deliver the hospitality, gaming, dining and entertainment experiences that our customers desire, it is important that our physical product and service delivery are relevant to our customers at appropriate price points, are consistent in standard and delivery, provide the variety of experiences that will encourage repeat visits and make it easy for our customers to do business with the group. Consumer expectations range from technology preferences to the look and feel of the physical product, the location of buildings, concepts for restaurants and bar offerings, types of entertainment and travel patterns.

The group seeks to respond dynamically to changing trends, refreshing casino and hotel offerings to reflect contemporary tastes and embracing new technologies that will improve customer experience. For example, free capped Wi-Fi has been introduced at all hotel properties. It is important our casinos provide an aspirational setting in which customers can feel encouraged to wager. Therefore, we have committed to investing significantly in the regular maintenance and refurbishment of our properties in order to keep the experiences attractive and relevant to our customers. Slot machines are replaced on an approximate seven-year cycle and the current average age of slot machines is five years four months. Many of these machines, however, have been upgraded or have had game changes to ensure they remain relevant. Physical standards at hotel properties are evaluated through hotel property audits. We believe that our properties offer a superior experience to those of our peers and of other leisure activities. In order to preserve our market position and to attract existing and new customers to our gaming and hotel operations, we intend to continue our disciplined programme of investment to continually refresh the offerings and décor of our facilities. There are no material deviations from the relevant brand standards.

Product development

Development of the casino and hotel real estate is a critical component of the group's business and its plans for organic growth. On average over the past five years, in excess of R800 million has been invested annually in the expansion, refurbishment and maintenance of the group's existing casinos and hotels, excluding the acquisition of new properties. The ability to develop and maintain relevant physical products is a key competency required in the business and the location selection, design concept, budgetary control and project execution during construction and ongoing property maintenance are the core skills required. Key personnel are employed on a permanent basis to deliver these core skills that safeguard and mentor this knowledge. These skills are augmented by a network of experienced professionals that have worked with the business for a number of years but who are regularly supplemented with new professional firms with the objective of introducing change and fresh ideas to established methods, concepts and systems.

Information technology

Information technology strategy and governance is driven centrally with divisional teams delivering operational system-specific solutions to meet the business requirements. Both divisions predominantly utilise third-party packaged solutions which have been purpose built for the industry. Key focus areas are gaming and hotel property management systems, customer relationship management to provide relevant benefits and rewards to customers, business intelligence to drive efficiencies and digital platforms to interact with and provide connectivity to customers.

It remains our strategy to leverage off specialist application software providers and not to invest heavily in our own internally developed systems. We believe suppliers are, in general, better positioned to carry out research and development and keep pace with industry changes and the rapid evolution of technology. However, we position ourselves to actively influence application development direction through direct participation and collaborative design with our suppliers. This approach optimises our technology investment and reduces redundancy.

Our core technology differentiator will remain the manner in which we utilise and integrate the relevant features of our systems to streamline and optimise our operations, enhance the customer experience and ensure Tsogo Sun is the easiest place to do business.

Tsogo Sun master brand

In 2012, Tsogo Sun gaming and Southern Sun, the previous umbrella brand for the group's hotel division, were incorporated into the Tsogo Sun brand, unifying the group under one name and the 'Sunburst' logo. This major rebranding exercise was intended to assist external stakeholders to better understand the variety of products that the group offers and the group believes it has achieved strong recognition within both the corporate and consumer markets in South Africa. The rebranding was also designed to encourage the group's employees in both the gaming and hotel divisions to work together more effectively and to ensure consistency of culture across the Gold Reef legacy casinos and the rest of the gaming business.

The group's marketing emphasises:

- the diversity of our products, from hotels to gaming, theatre, cinemas, dining and conferencing;
- our delivery of exceptional service at excellent value;
- our depth of experience and African heritage; and
- the suitability of our hotels and entertainment complexes for both leisure and business.

The group's retail marketing spend is directed towards its hotel offerings (mainly billboards, radio and print), although initiatives are also launched around the Tsogo Sun master brand, including television campaigns. Marketing spend in the casino business is largely focused on prize promotions, such as cars and cash. By having a centralised marketing department and plan, marketing spend at individual units can be redirected, and in some cases rationalised, to focus on marketing initiatives that are beneficial across the entirety of the group's portfolio. In recent years this has enabled efficiencies to be made in the group's marketing efforts, reducing cost and improving brand alignment. A consistent brand management strategy is essential in ensuring that the group's corporate identity is not compromised and that product brands continue to be closely aligned with the master brand.

Product relevance to customer experience

Customer satisfaction

Guest satisfaction is important to us and delivering consistent experiences is integral to our success and sustainability. The experiences of our guests create loyalty to our brands and properties, and guest retention is one of our primary priorities. In an effort to ensure that our guests are satisfied, after they have had an experience at one of our properties, we provide them with channels for communication that enable them to engage us so that we can collect information about our performance and proactively respond to their feedback.

Our business promises great guest experiences and consistency is a key driver in delivering on this promise. Consistency of brand delivery is made possible by each brand operating according to a set of brand operating standards. These standards are audited annually at hotels and on an ad hoc basis at casinos. The audits are

complemented by data obtained from feedback received from approximately 10 000 guests per month across the business via the eGuestSurv post-stay survey, as well as from third-party sites such as TripAdviser.

The guest satisfaction for Tsogo Sun hotels averaged at 87% this year compared to 86% last year. The improvement of our guest satisfaction at Tsogo Sun hotels is a result of enhanced awareness of our guests' needs and our ability to respond to them efficiently and effectively. With the success of the system in our hotels, the eGuestSurv survey was made available to customers at our casinos this year, and having completed an annual cycle using the system, received an average of 75% guest satisfaction.

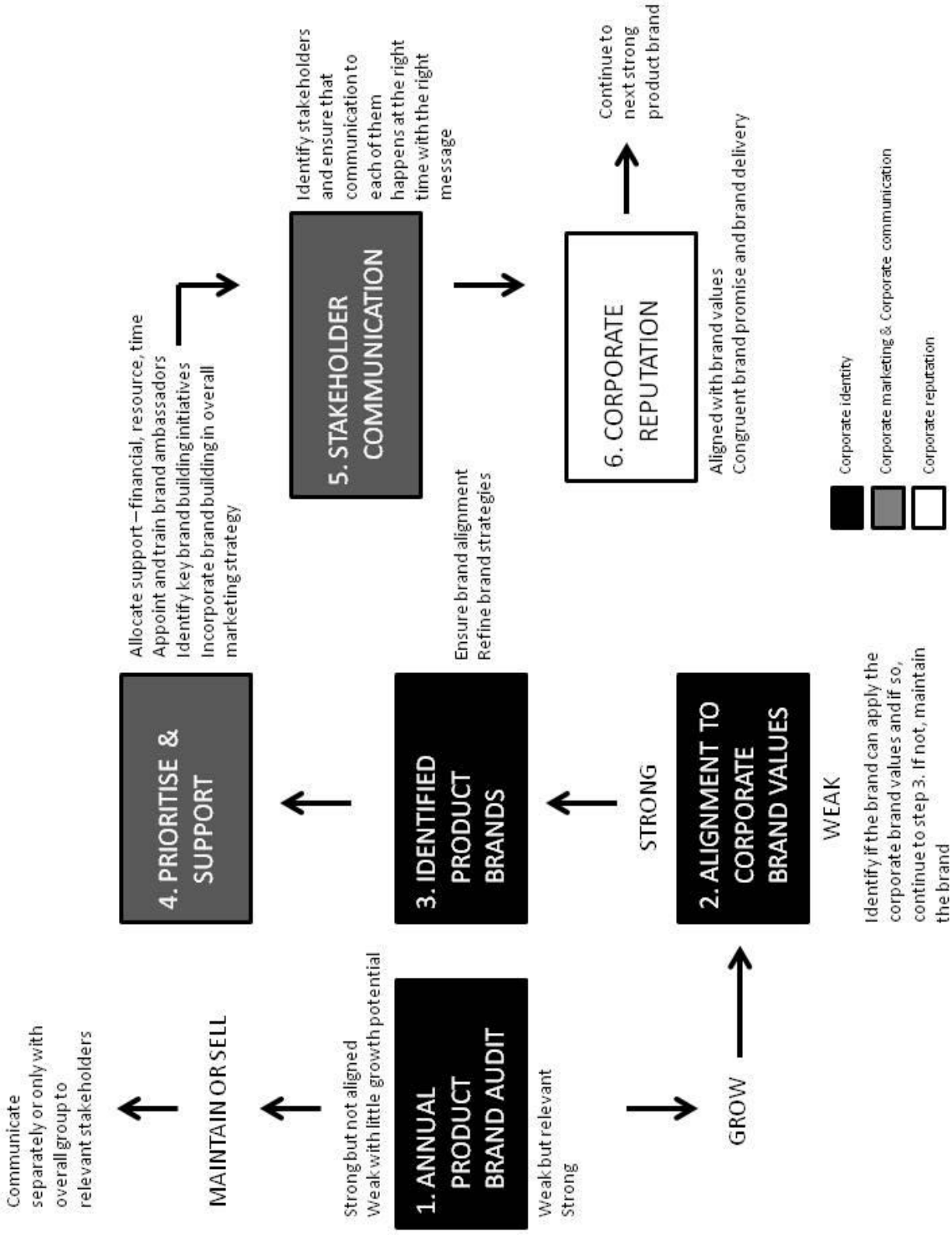
Customer reward programmes

During the year, Tsogo Sun introduced a new rewards programme at our hotels and casinos to better align the benefits with customer expectations and to ensure consistency across the group. The reward programme is designed to encourage relationships of mutual value with customers by giving benefits and rewards to cardholders and provides the group with detailed information about trends across its customer base which enables the group to improve our offering in response to changing consumer behaviour and to meet the demands of top-tier active reward club members more effectively. The programme replaced the different reward programmes that previously existed within our group: Frequent Guest in hotels; and Club Festival and Strike it Rich in casinos. While our gaming management systems do not allow for full portability of rewards and benefits, the programmes were restructured to ensure consistency across the group with regards to card status levels, rewards and benefits. The rewards programme was launched in the casinos over a period between April 2013 and November 2013. The hotel rewards programme was launched in February 2014.

The reward programme provides the group with detailed information about trends across its customer base and the activities of individual clients. This enables the group to improve its offering in response to changing consumer behaviour and to meet the demands of top-tier active reward club members more effectively.

Key components of the programme include:

- the programme has three status levels – gold (entry level), platinum (mid-level) and black (top level);
- the higher the status level, the higher the value of the base benefits offered;
- the status level for hotel cardholders is determined by revenue rather than nights stayed and cardholders are offered rewards based on their spend at our properties and the frequency of their visits;
- cardholders earn points for playing slots and tables and hotel cardholders earn SunRands for qualifying revenue in hotels;
- all cardholders receive accommodation discounts (5% at selected service hotels and 10% at full service hotels);
- there are no restrictions for the redemption of SunRands and no minimum amount or day of the week restrictions;
- hotel cardholders can redeem SunRands for food and beverage, even when they are not staying in the hotel;
- hotel cardholders qualify for 1G free Wi-Fi per day;
- all cardholders qualify for restaurant discounts between 7.5% and 20%, depending on their status level; and
- all cardholders qualify for entertainment discounts at Tsogo Sun entertainment venues.

Source: www.tsogosun.com

APPENDIX I – THE CORPORATE BRAND MANAGEMENT PROCESS