



**destea**

department of  
economic, small business development,  
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FREE STATE PROVINCE



# Study on the State and Ownership Patterns of the Hospitality Industry (Tourism Sector) in the Free State and the Linkages with Other Economic Sectors in the Province

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## **1. INTRODUCTION**

Globally, tourism is regarded as one of the fastest growing sectors, continuously exhibiting high levels of growth irrespective of both the ever changing economic and geopolitical factors in its operating environment. The South African tourism sector shares this same growth trajectory as the country continuously leads the Southern African Development Community (SADC) on this front. The tremendous growth, development and transformation opportunities garnered by the tourism sector have been highlighted by President Cyril Ramaphosa in his 2018 State of the Nation Address as well as in the 2018 Budget speech (Gigaba, 2018; Ramaphosa, 2018).

The Free State provincial government also recognises the role that tourism can play as a driver of economic growth and job creation for the province. One of the main reasons for this is the sector's ability to lend itself to other economic sectors through its broad value chain. The sector is interlinked with other priority sectors including agriculture and manufacturing, thus possessing a multiplier effect on economic growth and development.

A number of policy documents have been developed at national and provincial levels to provide a guiding framework for the sector's development. The first of these in the democratic era was the Tourism White Paper of 1996. The White Paper provided the foundation for which other national policy instruments would be constructed for the sector. In the context of the Free State province, the Free State Tourism Master Plan (FSTMP) and the Free State Growth and Development Strategy have a direct impact on the provincial sector's development priorities.

The hospitality industry is a part of a wider group of economic activities within the tourism sector. Hospitality is one of the fastest growing industries in the world, contributing billions to the global GDP (UK Essays, 2015: n.p.). The South African Department of Labour (DOL) defines the hospitality industry as "any commercial business or part of a commercial business in which employers and employees are associated for the purpose of carrying on or conducting one or more of the following activities for reward:

- Providing accommodation in a hotel, motel, inn, resort, game lodge, hostel, guesthouse, guest farm or bed and breakfast establishment, including short stay accommodation, self-catering, time shares, camps, caravan parks;
- Restaurants, pubs, taverns, café's, tearooms, coffees shops, fast food outlets, snack bars or, industrial or commercial caterers, function caterers, contract caterers that prepare, serve or provide prepare food or liquid refreshments, other than drinks in sealed bottles or cans whether indoors or outdoors or in the open air, for consumption on or off the premises; and
- Includes all activities or operations incidental to or arising from any of the activities mentioned above" (RSA Department of Labour, 2016: 5).

Hospitality is divided into four subsectors namely: accommodation, food and beverage, travel and tourism as well as recreation. Of these, the accommodation subsector traditionally contributes the most to the hospitality industry (Statistics South Africa, 2018:5).

## **2. PROBLEM STATEMENT**

The South African tourism sector, as previously mentioned, is currently receiving a lot of attention from researchers due its potential to create employment and increase the national output. Much of this attention however has been concentrated in provinces and regions with vast amounts of natural and cultural resources such as the Western Cape (Gustav and Visser, 2006: 88). As such, very little attention is paid to provinces such as the Free State and the Northern Cape, which contrarily do not seemingly have a competitive advantage in this respect. According to Statistics South Africa Domestic Tourism Survey Bi-annual report for 2017, day trips to the Free State province between April and June only accounted for 5.4 per cent of the national total. During the same period, the province recorded only 5.8 per cent of the country's total overnight trips. These figures show that the province is one of the least visited in the country, second only to the Northern Cape (Statistics South Africa, 2017c:6)

Data show that, when compared to other provinces in South Africa, the Free State province is currently not achieving its tourism goals as set out in the FSGDS and FSTMP notwithstanding its attractive tourism resource base and offerings (Statistics South Africa, 2017c:6). Tourism, one of the province's priority sectors, thus requires

urgent intervention from both the private and public sectors to positively change its economic contribution in line with other South African provinces, such as Gauteng and Limpopo which record a high number of tourist activity.

**Table 2.1: Province of destination by expenditure on most recent day and overnight trips, January–December (concluded), 2016 (R'000)**

Province of destination	Accommodation	Food and beverages	Domestic transport	Recreation and culture	Shopping	Other	Total
<b>Overnight trips</b>							
Western Cape	1 142 727	1 219 252	1 744 393	84 011	1 289 768	188 913	<b>5 669 064</b>
Eastern Cape	251 577	636 539	1 599 544	36 696	1 852 170	159 547	<b>4 536 073</b>
Northern Cape	28 789	107 316	246 848	13 576	221 371	17 019	<b>634 919</b>
Free State	111 259	246 341	402 129	21 384	466 794	67 519	<b>1 315 426</b>
KwaZulu-Natal	1 455 274	822 558	1 699 338	96 945	1 834 846	181 127	<b>6 090 088</b>
North West	270 571	323 878	578 378	33 373	512 057	74 792	<b>1 793 049</b>
Gauteng	378 700	694 407	1 707 143	88 987	1 426 649	219 876	<b>4 515 763</b>
Mpumalanga	560 844	955 437	956 824	26 937	771 744	58 135	<b>3 329 920</b>
Limpopo	186 587	625 943	1 369 954	27 147	1 472 912	141 602	<b>3 824 145</b>
Unspecified <sup>1</sup>	924 636	664 967	1 395 107	249 743	927 757	82 178	<b>4 244 388</b>
<b>Total overnight trips spending</b>	<b>5 310 963</b>	<b>6 296 639</b>	<b>11 699 659</b>	<b>678 797</b>	<b>10 776 068</b>	<b>1 190 708</b>	<b>35 952 834</b>

Source: Statistics SA, Domestic Tourism Survey, 2016

The table above shows the total expenditure for the year 2016 per province on overnight trips and indicates that annually R5 310 963 000 was spent on accommodation nationally. On average, guest spending on overnight accommodation was recorded as R323.43 per guest for the Free State province. Total spending on accommodation annually for overnight trips in the Free State province stood at R111 259 000 for the period (Statistics South Africa, 2016a). Although this amount represents a large percentage of tourist expenditure in the province, the total amount generated provincially for accommodation is significantly lower than what has been recorded in the other provinces.

Previous research by the South Africa SME Observatory (2012) identified Mangaung Metropolitan Municipality as one of the two priority geographical focal areas for tourism growth and development in the Free State. Due to the region's tourism asset base, its strategic location and the potential for growth, the focal tourism sub-sectors for the

<sup>1</sup> not stated clearly or exactly

region have been identified as business tourism, heritage tourism, crafts and sporting events (South Africa SME Observatory, 2012: 34). Mangaung's central location as well as its good road networks that integrate the region with the rest of the country add to its potential to be one of the nation's top business tourism destinations.

The region hosts a number of renowned festivals and events such the Rose Festival and Macufe. The Free Provincial Government spends an estimated R46 million annually on Macufe. In return, the festival generates approximately R150 million from both locals and tourists. Macufe attracts approximately 18 000 visitors from outside Mangaung to the region. What is worth noting however is that neither the number of nights stayed in Mangaung nor the number of events attended during the festival have increased since 2009 (Centre for Development Support, 2015: iii). These findings beg the question as to whether or not improving the hospitality offerings in the region would result in a higher return on investment incurred by the festival.

This study aims to examine the current state of the hospitality industry and the accommodation sub-sector of the industry in the Mangaung Metropolitan Municipality. The main objective of this study, which is in line with the objective of the Federated Hospitality Association of South Africa (FEDHASA), is to give recommendations on how to grow an inclusive and transformed hospitality industry (FEDHASA, n.d.). The study will focus specifically on one aspect of hospitality, namely the accommodation subsector.

### **3. RESEARCH METHODOLOGY AND LIMITATIONS**

The study employed both qualitative and quantitative data collection methods. The report commences with a literature view on the following; the performance of the tourism sector, tourism policy and institutional incentives.

It is important for DESTEA to have a much better understanding of the linkages within the tourism value-chain as well as to identify areas that require transformation. Linked to this is a need to understand the extent to which these linkages find expression in the provincial economy, the support needed to strengthen these linkages as well as providing recommendations to address issues of transformation. In that vein, a literature review on the both the tourism value chain as well as empowerment in tourism will follow.

The current statistics relating to the accommodation subsector in Mangaung are presented alongside similar statistical information for Nelson Mandela Bay Metropolitan Municipality as well as Buffalo Metropolitan Municipality. The rationale for this comparison is to show how other metros of a similar population size are performing in relation to Mangaung.

A semi-structured questionnaire was used to gather in-depth information from respondents, based on their accommodation establishment. The data collected from the respondents was analysed using Microsoft Excel. The aim of the research was explained to all participants prior to commencement of their involvement in the study

The most notable limitations to this study were a lack of resources, both material and human, as well as the small sample size. The initial topic of the study was the state and ownership patterns of the hospitality industry (tourism sector) in the Free State and the linkages with other economic sectors in the Province. Due to a lack of capacity, the scope was narrowed down to focus on only one aspect of the hospitality industry, and furthermore the focus area was shifted to Mangaung Metropolitan Municipality.

Of the overall total establishments requested to participate in the study (over 200), only a few respondents (14) completed and returned the questionnaire. This was due to a number of reasons cited by the various establishments. Many of the participants expressed that they had previously participated in similar studies which had not yielded tangible results. Consequently, the aggrieved chose not to participate in the study, which negatively influenced the quality of the data collected.

It is therefore imperative that the findings and recommendations of this, and other research reports, be made available to all relevant stakeholders.

As part of this research, an updated Mangaung Tourist Accommodation Database will be presented as part of the report's annexures. This is in an effort to assist in bridging the gap between tourism accommodation product owners and the general public.

#### **4. PERFORMANCE OF TOURISM**

In 2016, Travel and Tourism contributed US\$7.6 trillion to the global economy. This amount accounted for 10.2% of the global GDP. Additionally, the sector generated 292 million jobs, equivalent to 1 in every 10 jobs worldwide. The Travel and Tourism sector contributed 6.6% of total global exports as well as approximately 30% of total global service exports. The World Travel and Tourism Council (WTTC) predicted that the direct Travel and Tourism growth would continue to grow in 2017 to 3.8% from 3.1% in the previous year despite the occurrence of a number of challenging headwinds. This expected growth was said to be attributable to the sector's role as a tool for economic development and the sharing of cultures subsequently creating peace and building on mutual understanding amongst states. Continuous growth in the sector in the coming years will be dependent on on-going investment and development in an open and sustainable manner (World Travel and Tourism Council: 2017).

The African continent reached a record 62 million international arrivals in 2017. The tourism sector grew by 13% in North Africa while Sub-Saharan African experience only a 5% increase. Despite sustained economic growth factors such as air connectivity, travel cost, visa policies and poor infrastructure continue to challenge tourism growth in Sub-Saharan Africa. Currently tourism in the region is driven mainly by natural tourism. There is also significant room for improvement in guarding, valuing and communicating cultural richness.

According to the WEF Travel and Tourism Competitiveness Report for 2017, South Africa was ranked as the most economically competitive travel and tourist destination in the African continent. Mauritius followed closely in 2<sup>nd</sup> position. Globally South Africa, Mauritius, Kenya and Namibia represent the continent well ranking at 53, 55, 80 and 82 respectively. Europe continues to dominate the list with Spain, France and Germany occupying the top three positions on the list (Tourism Business Council of South Africa: 2017).

The World Economic Forum's (WEF) Global Competitiveness Report measures the competitiveness landscape of 140 economies, providing an understanding of the factors that influence their productivity and prosperity. The report for 2016 and 2017 shows that South Africa has improved slightly in terms of both in its score and ranking,

now ranking at 47 globally up two places from last year. South Africa has showed significant progress in areas such as enhanced competition, better use of talent in terms of how pay reflects productivity, and quality of education. The report has also recorded a number of factors which impact negatively for conducting business in South Africa. These include inefficient government bureaucracy; restrictive labour regulation, and an inadequately educated workforce (World Economic Forum: 2017).

The country's tourism performance is influenced greatly by policy. Policy provides a clear plan of action which seeks to position destinations as targets not only for travel, but also for cultural and commercial development, in order to attract investors and foster broad social and economic growth. The following section looks at the various policy which relates to the Tourism sector as well as incentives offered to participants in the sector.

## **5. TOURISM POLICY AND INCENTIVES**

### **5.1 National Tourism Policy Framework and Incentives**

Both national and provincial tourism initiatives are influenced by policy developments and market initiatives. The section below provides a brief overview of these policy initiatives in the context of economic development.

Although the National Department of Tourism (NDT) is primarily responsible for the formulation of tourism policy, other government departments such as the Department of Trade and Industry (DTI) and the Department of Economic Development (DED) have inter-related policies which also highlight the importance of the sector in achieving economic growth and employment creation.

Post-apartheid, the first document to recognise the potential of the tourism sector in contributing to the country's economic development was the Tourism White Paper 1996. The White Paper identified a number of guiding principles for the sector including; assuming the sector will be driven by the private sector, underpinning sustainable environmental practices in the sector and involving the community in tourism to ensure effective and efficient growth in the sector. The New Growth Path (NGP), which serves as a central economic development plan, identifies the sector as one of the six priority sectors integral to the creation of employment. According to the framework, tourism employment creation will be supported through strengthening

measures to expand the tourism infrastructure and services, by promoting targeted marketing campaigns, managing costs, quality assurance and logistics, improving training and identifying employment and entrepreneurial opportunities for the youth (RSA Economic Development Department, 31: 2011). Stemming from this policy document, the NDT developed the National Tourism Sector Strategy (NTSS) to give clear detail and direction as to how the sector is to fulfil its role as determined in the NGP. The aim of the strategy is to establish South Africa as one of the top 20 tourism destinations in the world by 2020 (South Africa SME Observatory, 2012: 12). The policy identifies specific actions through which to achieve this, including the following:

- Encouraging South African's to travel domestically
- Improving the working conditions of workers in the tourism sector
- Addressing safety and security misperceptions
- Improving regional and international air access
- And growing business and events tourism amongst others

The national policy documents mentioned above are without a doubt, at the core of growing the South African tourism industry. It is however important that practical solutions be implemented to reach any goals towards the sector's advancement. One of the ways this can be achieved is through institutional incentives and support structures. The NDT, along with its partners, offer a number of these to both emerging and established participants in the tourism sector. A few of the department's offerings are noted below:

#### **i. SMME Markets Access Programme (Hidden Gems)**

This programme is a collaboration between the Southern Africa Tourism Services Association (SATSA) and South African Tourism (SAT), which identifies small tourism businesses in each of the nine provinces to receive training and mentorship by industry professionals, as well as providing them with access to travel agents and other key industry stakeholders. The initiative aims to develop the SMME tourism sector and contribute toward transformation (South Africa Tourism, 2017: 11). Top-10 tourism products are selected per province to participate in the peer-to-peer mentorship and trade marketing platforms. Participants are also given the opportunity to network with key decision-makers from leading inbound tourism trade at a speed marketing session

hosted prior to the annual Tourism Indaba in Durban. This initiative is specifically aimed at historically disadvantaged SMME tourism businesses across South Africa (Tourism Update, 2016).

#### **ii. Tourism Enterprise Support Programme (TEP) Grant in the Tourism Sector**

The objective of this grant is to encourage and facilitate the development of tourism facilities. Large operators, investors and SMMEs engaged in tourism activities stand to benefit from this grant. Benefits of the grant include skills development, market access and business support (Government Investment Incentives, nd).

#### **iii. Tourism Transformation Fund (TFF)**

The Tourism Transformation Fund (TTF) is a dedicated capital investment funding mechanism established by the NDT in partnership with the National Empowerment Fund (NEF). The TTF focuses specifically on financial support for black investors and communities investing in capital projects in the tourism sector. The aim of the fund is to drive transformation in the tourism sector in a more direct and impactful manner that will not only assist black-owned tourism enterprises to expand and grow, but also catalyse the rise of a new generation of black owned youth, women and community owned tourism enterprises to take the tourism sector to new heights.

The total value of this fund amounts to R40 million annually, over a period of three financial years up to 2020. The grant funding will be used to reduce the funding gap that may exist between the prospective investor's own contribution and the approved loan finance and/or equity contribution by the NEF for tourism projects. Successful participants stand to be awarded a maximum investment of R5 million.

#### **iv. The Culture, Art, Tourism, Hospitality, and Sport Sector Education and Training Authority (CATHSSETA) Grants**

CATHSSETA, formerly known as THETHA, is one of 21 SETAs established under the Skills Development Act (No 97 of 1998) in 2001. The SETA facilitates skills development within a number of sub-sectors, including hospitality, travel and tourism, arts, culture and heritage among many others. This is done through the disbursement

of grants for learning programmes, monitoring of education and training as outlined in the National Skills Development Strategy (NSDS).

**v. Tourism Broad Based Black Economic Program (B-BBEE)**

Tourism Broad-Based Black Economic Empowerment (B-BBEE) is committed to empower of all stakeholders in the Tourism Sector. This will be achieved through transformation of the sector as well as working collectively to ensure that the opportunities and benefits of the Tourism Sector are extended to black South Africans as well.

The South African government moved away from a narrow form of advancing economic transformation by broadening the scope of Black Economic Empowerment (BEE), resulting in Broad-Based Black Economic Empowerment (B-BBEE) in 2007. This policy aims to broaden participation in the economy of the country to result in an equitable society. This will be achieved through the creation of opportunities for those people who were previously excluded from meaningful economic participation. The policy seeks to address issues such as the ownership of enterprises, management and control of those enterprises, procurement, enterprise development, skills development, employment equity and socio-economic development (RSA:NDT, 2018).

**vi. Executive Management Development Programme**

The NDT in partnership with SA Business School have developed an Executive Management Development Programme to further advance the empowerment of women. This programme aims to equip black female managers for top senior management positions. Additionally the programme prepares women to become entrepreneurs who will contribute to the creation of black industrialists (Regional Tourism Organisation Southern Africa, 2015).

**vii. Tourism Service Excellence Programme**

The Lillizela Awards were established by the department to celebrate companies which contribute positively to socio-economic development, transformation, responsible tourism and service excellence in the industry (Regional Tourism Organisation Southern Africa, 2015).

### **viii. The Green Tourism Incentive Programme**

The NDT working together with the Industrial Development Corporation (IDC) has initiated the Green Tourism Incentive Programme (GTIP). The programme focuses on the implementation of renewable energy generation and efficiency solutions that will assist private sector tourism enterprises to reduce input costs, ultimately enabling increased competitiveness and operational sustainability. Qualifying small and micro tourism enterprises stand to receive grant funding on a sliding scale from 30% to 90% -capped at R 1 million (RSA:NDT, 2018).

### **5.2 Provincial Tourism Policy Framework and Incentives**

The Free State province has two main policy initiatives which have direct implications for tourism, namely the Free State Growth and Development Strategy (FSGDS) as well as the Free State Tourism Master Plan (FSTMP).

In respect to the tourism sector, the FSGDS identifies the province's competitive advantages. These include the province's abundance of natural scenery, its rich history and vast cultural heritage sites. Adding to this the province has good road networks which integrate the province with the rest of the country, thus allowing the Free State to take advantage of its central location. Aside from the aforementioned, a number of priorities are mentioned in the strategy including marketing Bloemfontein's heritage and cultural attractions, developing a business focus in Mangaung as well as marketing the province to domestic tourists.

The FSTMP builds up from the FSGDS, further identifying major risks to the development of tourism in the province and setting out developmental priorities for the Free State.

At a provincial level, the Free State province has in the past facilitated a number of programmes to enhance tourism skills development through the Department of Economic, Small Business Development, Tourism and Environmental Affairs (DESTEA). Currently only a few programs remain to assist participants involved in tourism. These include hospitality training in Thaba Nchu, the Mohokare Lodge Revitalization Programme as well as the Krugersdrift and Rusfontein dams projects which are currently in their planning phase. The dam projects will entail good

management of reserves, recreational use and livelihood programmes linked to tourism (Tello Tebesi Mangaung, 2018).

To assist the province in leveraging its tourism potential, more funds must be allocated to ensure institutional support and incentives for participants in the industry.

## **6. TRANSFORMATION AND EMPOWERMENT IN TOURISM**

### **6.1 Gender Transformation**

According to research by the World Economic Forum (WEF), every 30 new tourists to a destination create one new job (WEF, 2017: 26). Tourism is one of the key drivers for economic growth and employment creation in South Africa (Rogerson, 2009), therefore reviving and investing in the sector could potentially tackle the employment crisis faced by the country. The WEF reports that globally the travel and tourism industry has almost twice as many women employees as other sectors. Judging from the findings above, the sector has the potential to play a major role in employment gender transformation. In addition to this, the travel and tourism industry offers job opportunities for both people entering the labour market with no prior experience as well as those without many options in other sectors. Furthermore, the industry plays a vital role in creating prospects for low-skilled workers as well as other marginalised groups (WEF, 2017: 26). Given the current youth unemployment crisis in South Africa, efforts should be made to absorb as many youths as impossible into the industry. The UNWTO Global Report on Women in Tourism found that women in the tourism and hospitality industry typically earn between 10% and 15% less than their male counterparts. The following section will review different literature on transformation in tourism and hospitality. Transformation in this context refers to gender, race as well as economic transformation of the industry.

A fair amount of literature exists pertaining to gender diversity in the tourism and hospitality industry. Pinara, McCuddy, Birkanb and Kozakc (2011) argue that although there has been remarkable progress with respect to closing the gender gap in hospitality, “patterns of employment ghettos” are still prevalent. These relate to situations where certain departments are filled predominantly by either men or women (Pinara et al, 2011: 73). Adding to this, several studies have showed a disparity in the distribution of income between men and women in the tourism and hospitality industry,

with women earning less than their male counterparts (Biswas and Cassell, 1996; Pinara et al, 2011; Purcell, 1996; Sparrowe and Iverson, 1999). Sparrowe and Iverson (1999) contended that this type of gender based income disparity should be viewed as a form of sexual discrimination within the industry. Baum (2003) presented a gender pyramid showing that lower levels and occupations with fewer career development opportunities with the hospitality industry are dominated by women while key managerial positions are dominated by men. Choices made by women, such as starting families, which stand to interrupt their careers have been cited as one of the reasons for preventing women from attaining better paying positions (Manwa and Black, 2002; Throne, 2007).

However, other scholars have highlighted that gender cannot be the ultimate determinate resulting in the disparities in the distribution of income and senior positions in the industry. In 2003, Abid and Guerir examined ways in which additional factors such as race, ethnicity and other social factors affected workplace power relations between chefs and their employees. Their study revealed that a lack of power stemming from individuals foreign status was the most significant determinant for unfavourable working conditions for women.

According to Statistics South Africa, 54% of individuals employed in hotels, motels and inns are female. Quite the same situation was observed in guesthouses, with 70% of employees recorded as female. Generally across all establishments in the South Africa accommodation industry, female employees were dominant in the year 2015 (Statistics South Africa, 2016a: 41).

Although these numbers seem promising, women tend to occupy lower or entry level positions in the tourism industry. In an effort to change the current status quo, the NDT has initiated the Women in Tourism 30 in 5 (WiT 30 in 5) campaign. The campaign aims to increase the proportion of women in tourism management positions up to 30% in the next five years. The initiative is a collaboration between both the public and the private sector. To date, WiT 30 in 5 has already begun taking concrete steps to increase the number of women in executive management and directorship positions. (South African Tourism, 2017: 10). In addition to this, another programme aimed at advancing the empowerment of women within the sector is the Executive Management

Development Programme, mentioned in the previous section on institutional incentives.

## **6.2 Race Transformation**

Since the demise of the apartheid system, South Africa has been on a path towards a transformation of the economy. The government has continuously expressed disdain at the particularly high levels of white ownership of tourism enterprises still prevalent throughout the country. The sector's benefits often do not extend to poorer communities, nor do they result in economic development. This is mainly due to the fact that South Africa's tourism economy continues to be dominated by a small group of large, mostly white-owned tourism organisations (Rogerson, 2007:7). Rogerson and Visser (2004) argued that, as a pro-poor strategy, tourism has the potential to promote community and sustainable development as well as the potential to promote local economic development (LED) in underprivileged South African communities. In this context, by taking full advantage of increased transformation, the industry seeks to empower disadvantaged individuals. This goal cannot be attained only through creating employment opportunities for disadvantaged individuals, but by placing them in the position whereby they can own tourism businesses. Although, as mentioned above, the tourism industry is economically dominated by larger companies, the vast number of South African tourism enterprises can in fact be classified as small, medium and micro enterprises (SMMEs). This shows the industry's potential to impact transformation and economic development for both large and small enterprises,

The national government set out to achieve racial transformation in the South African economy through the promulgation of the Black Economic Endowment (BEE) policy, later called Broad-Based Black Economic Empowerment (B-BBEE). Following suit, in 2014 the tourism sector established the Tourism Charter sector specific guidelines towards transformation and black participation. In the Tourism Charter, goals towards transformation were clearly set out for 2014 and then later 2017 (Mofokeng, 2017: 1). In a 2017 study on LED in the accommodation sector, Mofokeng presented the table below to illustrate how far the accommodation sector is in attaining the goals set out in the Tourism Charter. The table, as adapted from the study, shows that the Tourism Charter 2014 target and the Tourism B-BBEE sector codes have not been met with the exception of the preferential procurement indicator. This, Mofokeng argued is mostly due to the fact that establishments purchase their goods from BEE compliant

suppliers. These suppliers however were found not to be small Black-owned businesses, but rather larger retailers (Mofokeng, 2017: 90).

**Table 6.1: BEE and B-BBEE Targets 2014 and 2017**

Indicator	Indicator to measure achievement	2014 Target	Was the target met	2017 target
Ownership	% share of economic benefits as reflected by direct shareholding by Black people	30.00%	No	30.00%
Strategic representation	1. Black people as a % of Board of Directors	50.00%	No	50.00%
	2. Black women as a % of Board of Directors	25.00%	No	25.00%
	3. Black people as a % of executive management	50.00%	No	
	4. Black women as a % of executive management	25.00%	No	
Employment Equity	1. Black people as a % of management	50.00%	No	60.00%
	2. Black women as a % of management	25.00%	No	25.00%
	3. Black people as a % of supervisors, junior & skilled employees	65.00%	No	70.00%
Preferential Procurement	Spend on BEE compliant companies as a % of total procurement spend	50.00%	Yes	50.00%

*Table adapted from: Mofokeng, 2017: 90*

It is increasingly important to link black SMMEs to larger enterprises by means of outsourcing, subcontracting or other arrangements. These arrangements are an important means of upgrading the SMME economy, and in turn the national economy at large. This is because business linkages, as explained by Kirsten and Rogerson (2002:33), will enable black-owned local entrepreneurs to participate in growing the tourism economy. A factor of importance in the linkages of these groups is the role of government both at national and provincial levels.

In this respect, the Free State province launched the Free State Black Business Council (FSBBC). The council, as described by the former Free State Premier's Spokesperson Tiisetso Makhele, is a broad body of black business people. The council is an umbrella body of specific business forums such as Black Chisa Nyama owners, Black Game Farmers and Black Guesthouse Owners. The provincial government is in support of the establishment of this council as it will, among its various goals, enhance the province's tourism sector (Bloemfontein Courant, 2017). The DESTEA Tourism Sector Transformation sub-programme aims to address issues of transformation within the Free State Tourism sector. The sub-programme's strategic goal, in line with the departmental goals is to foster tourism sector transformation and

development for improved market share. In an effort to achieve this goal, the sub-programmes has a number of activities scheduled for the current financial year. One of these is the Kasi Tourism programme. The programme is a vigorous marketing initiative to brand the Free State province as preferred inland tourism destination through the promotion of township tourism. Related to this initiative, the sub-programme intends to promote entrepreneurial culture in the tourism sector by providing mentorship, coaching and support to emerging tourism SMMEs in the province. The Tourism Sector Transformation sub-programme also aims to increase the provincial tourism market share by facilitating tourism awards across all sectors to promote the tourism sector (DESTEA, 2018: 112).

## **7. TOURISM SECTOR VALUE CHAIN AND LINKAGES**

In a study by Mitchell and Ashley (2010), the tourism sector was found to exhibit impressive growth rates in many parts of the global South. Christian, Fernandez-Stark, Ahmed and Gereffi, (2011) argued that the capacity of a tourist destination's ability to capture gains from the sector's growth is highly dependent on its ability to strengthen local linkages in value chains. Particularly in the case of developing countries, the maximisation of the sector's potential to contribute to the welfare of communities requires constant growth and consolidation of these economic linkages (Rueegg, 2009; Sandbrook, 2010b; Scheyvens, 2011). More consideration is needed to understand how to enforce linkages in tourism either through the actions of national or local government (Kelly, 2008; Lacher & Nepal, 2010b; Meyer, 2007; Timothy & Teye, 2009). It is widely acknowledged amongst tourism planners that in context of the developing world, linkages between tourism and various sectors are often weak and require improvement through integrating tourism more thoroughly into local economies, thereby catalysing other local activities (Dodman & Rhiney, 2008; Kelly, 2008; Lacher & Nepal, 2010a; Meyer, 2007). Although great emphasis is put on the value of linkages between tourism and various sectors, it is equally important to note the existence of leakages. Sandbrook (2010) defines leakages as "when revenue leaves the destination as profit to non-local businesses or for the purchase of external goods and services" (Sandbrook, 2010a: 21). This could be the case when non-local are used in the procurement of goods and services for the industry. As such Scheyvens (2011: 153) proposes that the major goal of governments of developing

countries with significant tourism potential should be to reduce leakages and maximise multiplier effects of the sector's linkages.

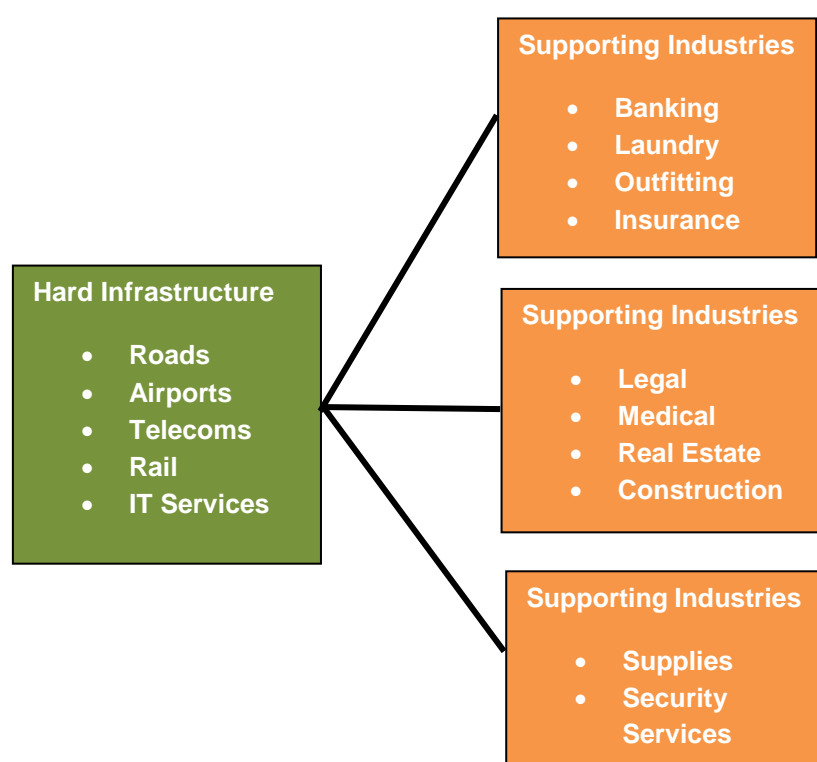
The tourism value chain is the route through which a tourism product, service or experience is trade to a tourism consumer. This channel comprises of a range of economic actors who, when working together, bring tourists to their desired destinations (South Africa SME Observatory, 2012: 22). In the value chain, tourism product owners are connected to consumers through intermediaries such as travel agents, outbound and inbound operators. Alternatively and in more recent times, the internet has increasingly been used to connect suppliers and consumers.

Largely, the extent to which suppliers are successful depends on their ability to reach and engage effectively with potential consumers, showing the importance of marketing in the tourism. The WEF GCR shows that although government spending on travel and tourism remained unchanged in 2017, marketing campaigns have been relatively effective in attracting tourist (WEF, 2017: 22).

The South African government has highlighted the importance the tourism sector in both economic growth and employment creation citing the sectors vast scale as well as its inter-linkages with other sectors in the economy. These include agriculture, construction, financial services as well as manufacturing. The South Africa SME Observatory Position Paper 2012 further unpacks the sectors structure by means of the following example: as both tourist arrivals and tourist expenditure increase in an area, in the same vein demand for food, accommodation and transport will increase. These increases in turn catalyse growth in the area's various economic sectors such as agriculture, construction and manufacturing sector (South Africa SME Observatory, 2012: 19).

The tourism sector is made up of various stakeholders, products and services including tourists, enterprises and a range of tourism products such as accommodation restaurants and recreational facilities. Additionally the sector has inter-linkages with other sectors and services. These are illustrated below.

**Figure 7.1: Tourism Sector Inter-linkages**



*Image adapted from: South Africa SME Observatory*

Identifying the various linkages between the tourism and other economic sectors will allow for the advancement of Local Economic Development (LED) within the Free State Province. LED is a form of economic development which focuses specifically on the importance of economic activities in a localized region, such as a city, region or district. The purpose of this is to make use of the economic capability of a region to the advancement of its broader economy and ultimately, the quality of life of all of its inhabitants (Mofokeng, 2017: 14). This process allows for collaboration of public, business and non-government sectors in an effect manner to collectively create conditions which are conducive to economic growth and to the creation of employment (World Bank, 2016; Mofokeng, 2017:14). For a chance at success, the advancement of any such LED initiative well have to be led by local government strategies as LED is about communities continually improving their investment climate and business enabling environment to enhance their competitiveness, retain jobs and improve incomes (Human Sciences Research Council, 2003: 4).

In the South African context, tour guiding is one of the most important components of the tourism value chain. Tour guides are of extreme importance as they interact daily with tourist on a personal level. As such, a tour guide with proper training has the ability to enhance tourist's experiences and perceptions of tour destinations, creating lasting impressions and fond memories (RSA NDT, 2017: 57). Due to an increase in funded initiatives aimed towards the training of tour guides, South Africa has experienced a steady increase in its number of qualified tour guides. Despite this optimistic picture on a national scale, the provincial narrative is somewhat bleak as the Free State accounts for less than a percent (0.6%) of the national share of registered tour guides (RSA NDT, 2017: 58).

Previously, DESTEA had facilitated a programme to place tour guide on the provincial registrar. The programme focused on emerging tourist guides who had undergone necessary prescribed training qualifying them as tourist guides (DESTEA, 2011: n.p.).

Having trained and knowledgeable tour guides in the province, who have a broad understanding of the province's tourism product would assist not only in attracting new tourists to the province, but also in assuring that past tourists return to the province.

## **8. HOSPITALITY AND ACCOMMODATION**

The hospitality industry plays an integral role in South Africa and in its tourism industry in particular. The primary foundation of the industry is built upon customer service. The industry in many respects thrives on disposable income spent on travel or dining out (Naidoo, 2004: 2). Conversely, challenging economic times can trim the profitability of these areas, thus education and strong management skills represent highly sought after items for a resume. Thus, the hospitality definition relies upon providing guest satisfaction for luxury or leisure-based activities, rather than providing goods and services that meet basic necessities (Ecole Hoteliere Lausanne, 2014).

The industry is complex, covering a range of jobs, locations, activities and economic brackets. According to the World Travel and Tourism Council's report of 2014, the hospitality industry one of the fastest growing industries globally. The industry has continuously reported growth rates higher than the rate of growth of the global economy, contributing US\$7 trillion annually to total world domestic gross product.

Howard Roth, a leader in global real estate, forecasted that the industry will create an additional 75 million jobs in the next decade (Ecole Hoteliere Lausanne, 2014).

Accommodation is a fundamental element of the tourism product and typically accounts for one-third of tourist expenditure. Statistics South Africa defines a tourism characteristic industry as an industry in which at least 25% of the output is sold to tourism. In this respect, the accommodation industry is a tourism characteristic industry as tourism consumes the bulk of its output. The accommodation industry would not exist without the tourism sector. In 2015, Statistics South Africa reported the tourist accommodation industry contributed over 15% to the direct tourism GDP, falling only second place to transport (Statistics South Africa, 2018:5).

Industries in the accommodation subsector provide lodging or short-term accommodations for tourists, both local and international. The accommodation subsector is made up of a wide variety of establishments ranging from caravan parks to 5 star hotels. Each provides a certain appeal to a particular market. While some establishments provide only basic lodging, others provide meals, laundry services, business amenities, recreational facilities and luxury experiences. Establishments in the subsector are classified according to the provision of these various services and facilities, determining how much revenue they generate (United States Department of Labor, n.d).

To ensure that accommodation establishments are classified according to a globally recognised standard the Tourism Grading Council of South Africa (TGCSA), a business unit of South African Tourism (SAT), provides grading for a range of establishments. The TGCSA is the only recognised and globally credible quality assurance body for tourism products in South Africa. To ensure that South African tourist accommodation is of the highest quality the national tourism sector is currently promoting the star grading of establishments. This will enable the country to compete with top tourist destinations in terms of tourist accommodation offerings (RSA NDT, 2017: 68).

Statistics South Africa published an in depth report presenting estimates in respect of the accommodation large sample survey (LSS). The most recent report published in October 2017 presented findings for the year 2015. Notably, the publication only covers hotels, motels, inns, guesthouses, guest farms and other accommodation

establishments registered for value added tax (VAT). The report therefore does not include informal accommodation establishments such as those registered on websites like AirBnB.

It is important to note the exclusion of the informal accommodation sector as it continues to grow in popularity. AirBnB is one of the most popular and profitable websites catering for both the formal and informal accommodation sector. To date, over 300 accommodation establishments are advertised on this site for the Bloemfontein area alone (AirBnB, 2018). Christen and Raynor (2003) describe this service as a 'disruptive innovation' as the company's innovative internet-based business model and its unique appeal to tourists pose a significant threat to the traditional market. The site is essentially an online platform which allows ordinary people to rent out their spaces as accommodation for tourists. In many instances, AirBnB rentals are technically illegal as they allow individuals to participate in the accommodation sector without paying any additional business taxes or levies (Guttentag, 2015: 1193). Such innovations cement the findings of Wynne, Berthon, Pitt, Ewing and Napoli (2001) who argued the importance of the internet in the distribution of the South African tourism value chain. Their study showed that online innovation poses a significant threat to the traditional value chain, especially in developing countries. From these findings, the study recommended that individuals in the "real market" refocus their energy on improving the real world shopping experience while also using the internet to regain their competitive advantage (Wynne et al, 2001: 430).

However, returning to the Statistics South Africa report, the total income for the accommodation industry in 2015 was recorded as R47.2 billion, representing an increase of 6.7% per annum over the income reported in the previous survey of 2012. This increase was due to increases in income for 'hotels, motels and inns' (R5.7 billion), 'guesthouses and guest-farms' (R756 million) and 'other accommodation' (R1.9 billion). As at the end of June 2015, the total number of persons employed in the South African accommodation industry was 109 196, an increase 5704 from the figure reported in 2012 (Statistics South Africa, 2017: 3).

Aside from the accommodation offered at the establishments which intuitively accounts for the bulk of the income acquired, the various services rendered in the

accommodation industry bring in a significant amount of income. In 2015, casinos and functions (e.g. weddings and business events) accounted for 37.6% of the income in the accommodation industry. It is therefore important for tourist accommodation establishments to offer more than just the standard service of accommodation and consider the various needs of their client base to bring in more income.

In 2015, according to Statistics South Africa, the province in the lead of the accommodation industry, recording the largest income from sales of goods and services rendered, the highest contribution to employment and the largest number of unit stays available in the accommodation industry, was Gauteng followed by the Western Cape. The Free State province's contribution to the various categories was especially insignificant, contributing only 1.5%, 4.3% and 2.9 % to sales of goods and services rendered, total employment, and stay units available respectively (Statistics South Africa, 2017A: 34).

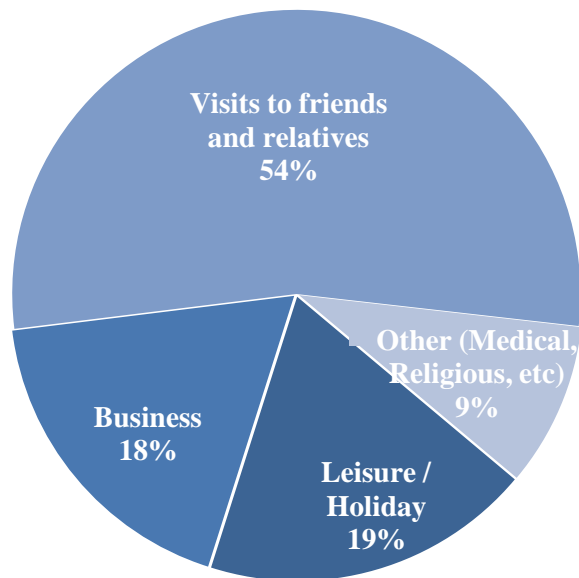
## **9. TOURISM AND ACCOMMODATION IN MANGAUNG**

When compared to other regions in the Free State, the Mangaung Metropolitan Municipality accounts for a total population of 842,000, or 29.5% of the total population in the Free State Province, which is the most populous region in the Free State Province for 2016. The region also has the largest tourism industry in the province.

Free State Province had a total tourism spending of R 11.9 billion in 2016 and an average annual growth rate of 9.1% over the period. Mangaung Metropolitan Municipality had a total tourism spending of R 5.21 billion in 2016 with an average annual growth rate of 9.4% since 2006 (R 2.13 billion). This estimated amount accounted for 43.7% of total tourism spending in the province (IHS Markit, 2017).

In 2016 an estimated 826,000 trips were made to Mangaung. This figure represents an estimated increase of 49 000 additional trips as compare to the previous year. As illustrated in the chart below, more than half the trips made to Mangaung in 2016 were to visit friends and relatives, 19% of the trips made to the region were for leisure while 18% and 9% of trips were made for business and other reasons respectively (IHS Markit, 2017)

**Figure 9.1: Tourism trips by Purpose of trip Mangaung Metropolitan Municipality, 2016**



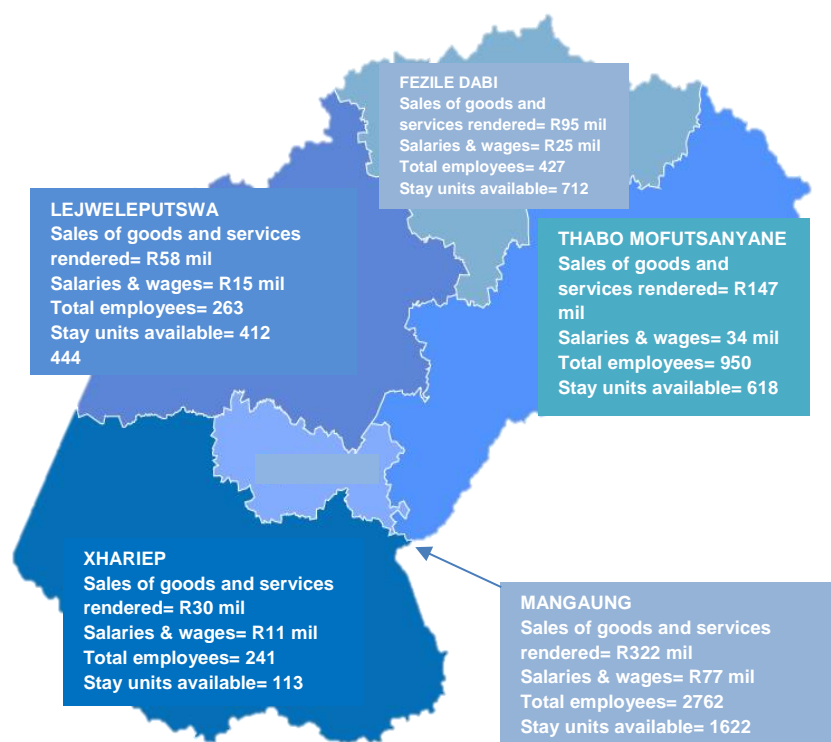
*Image Adapted from: IHS Markit Regional eXplorer*

Overnight trips to Mangaung increased by 400 000 annually from 2015 (4 430 000) to 2016 (4 830 000). Of the recorded overnight trips to the region, 68% were made by international tourist while the remaining 32% were by local tourists. This is contrast with the day trips made to the region where the majority of the trips (59% or 487 000 trips) were made by local tourist and the remaining 41% (339 000 trips) were made by international tourists in 2016 (IHS Markit, 2017).

These results are further resonated by findings of the South Africa SME Observatory report which identified Mangaung and Matjhabeng as the top two tourism municipalities in the Free State (South Africa SME Observatory, 2012: 32).

Mangaung Metropolitan Municipality is rich in history being the home of the two main South African political parties, the African National Congress and the National Party (now known as the Democratic Alliance). Bloemfontein, which is situated in the metro, is the country's judicial capital, boasting both monuments of significance to the nation's present and past. Aside from the metro's cultural and historic assets, business tourism has immense potential in the region. Both the FSGDS and the FSTMP identify this type of tourism as an opportunity for the province, with the FSGDS stating specifically that "Bloemfontein could exploit its central location for regional and national conferences" (South Africa SME Observatory, 2012: 34).

**Figure 9.2: Key statistics by district/metro in the Free State accommodation industry, 2015**



*Image adapted from: Statistics South Africa. Accommodation Industry 2015. Table*

The illustration above gives a clearer overview of the province's performance with regards to the tourism accommodation subsector in 2015. As showed above, Mangaung Metropolitan Municipality was at the forefront of the province's tourist accommodation industry with sales of goods and services rendered at R322 million, salaries and wages recorded at R77 million, total employees at 2762 and 1622 unit stays available (Statistics South Africa, 2017A: 34).

Although Mangaung outperforms other municipalities within the Free State province, it is imperative to have an understanding of how the metro holds up against other metros of a similar size within the country. For this reason, the table below shows key accommodation statistics for Mangaung against those of Nelson Mandela Bay and Buffalo Metropolitan Municipality. Both municipalities are located in the Eastern Cape province, which accounted for 13% of the country's total overnight trips in 2016 as compared to Free State's share of only 4.6% (Statistics South Africa: 2017B) The table below shows that when compared to other relatively small metropolitan municipalities, Mangaung Metropolitan Municipality's tourism accommodation subsector is not

performing as well as they are. This further shows the importance to improve both the metro's tourism sector and accommodation subsector in order to fully benefit from the sector's potential.

**Table 9.1 Key accommodation industry statistics by metro 2015**

Metropolitan Municipality	Sales of goods and services rendered	Salaries and wages	Total Employees	Stay units
	(million)		(number)	
Buffalo	790	267	5018	2481
Mangaung	322	77	2762	1622
Nelson Mandela Bay	1174	257	2519	3250

*Table adapted from: Statistics South Africa. Accommodation Industry 2015. Table 34*

## 10. SURVEY FINDINGS

In the following section, the key findings from the research questionnaire will be presented. The findings of the close ended questions will be presented in tables and figures to follow. Feedback from the open ended questions will be analysed and presented at the end of this section

**Table 10.1: Sample Demographic.**

Area of Operation			Nationality of Owner/s		Race of Owner/s				
Bloemfontein	Thaba Nchu	Botshabelo	RSA	Other	Black	Coloured	White	Indian/ Asian	Other
71%	14%	14%	100%	0%	43%	7%	43%	0%	7%

**Figure 10.1: Accommodation Type**



**Figure 10.2: Gender of Owners**

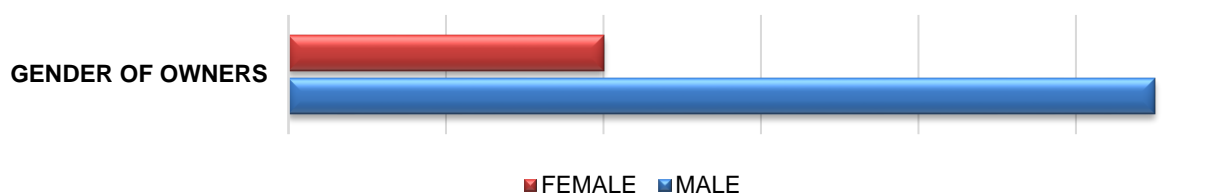


Table 10.1 above shows that the majority of the research sample (71%) operate in Bloemfontein, while 14% operate in Thaba Nchu and Botshabelo respectively. With regards to the type of accommodation offered by the various establishments, the majority classify themselves as Guesthouses/Bed and Breakfasts, followed by self-catering, hotels and backpackers. The classification of the type of accommodation offered is not mutually exclusive as some establishments offer more than one accommodation type. It is however worth noting that the majority of the tourist accommodation product in the area is guesthouses. The entire sample comprised of South African establishment owners of which 43% were black, 7 % coloured, and 43% white and 7% classified themselves as other. Although the sample presented shows an equal split between black and white owners, in the urban area Bloemfontein the significant majority of establishments are white owned (60%). This is similar to the findings of Visser and Kotze (2006) who found that the Free State tourism sector in general is essentially, as well as its tourism products are white owned.

Only 20% of the sampled establishments in Bloemfontein were black owned. Contrary to this, black establishment owners in the sample are concentrated in Thaba Nchu and Botshabelo. Black establishment owners expressed that not enough support is available for them in terms of funding. Most of the establishment owners in the sample were male 71, while only a few were female. Again, the gender of the owners is not mutually exclusive as some establishments are collectively owned.

**Tables 10.2 and 10.3: Grading Status, Employee Characteristics and Years in Operation**

TGCSA Grading						Number of employees				
Not Graded	One Star	Two Star	Three Star	Four Star	Five Star	0-5	6-10	11-20	21-100	100+
50%	0%	29%	7%	7%	7%	57%	36%	0%	7%	0%

Number of youth employed (persons under the age of 35):					Number of people living with disabilities employed					No. of years in operation			
0-5	6-10	11-20	21-100	100+	0-5	6-10	11-20	21-100	100+	0-5	6-10	11-20	21+
86%	0%	0%	7%	0%	86%	0%	0%	0%	0%	29%	21%	29%	21%

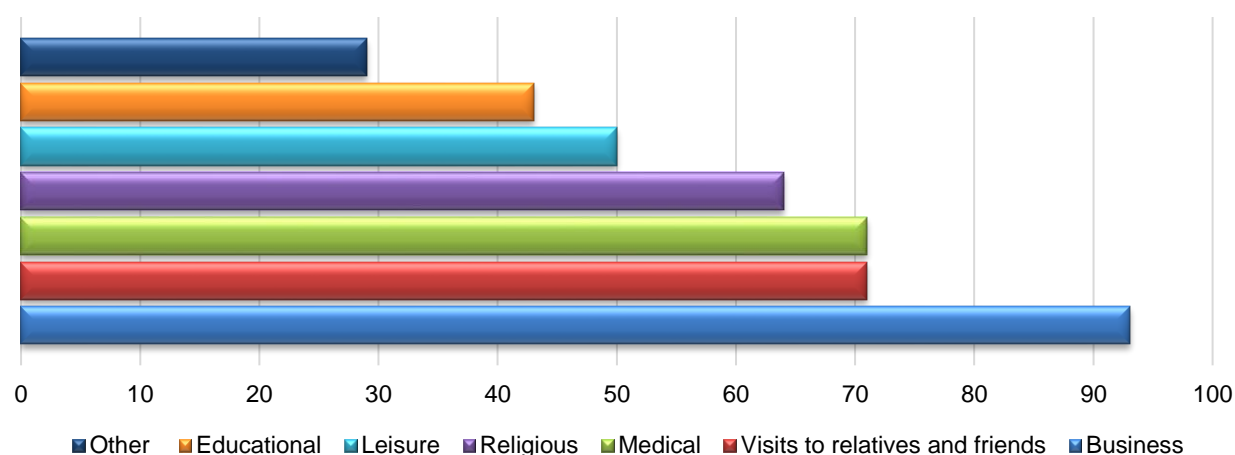
Half of the establishments in the sample are not currently graded by the TGCSA, while the majority of the graded establishments have a two star rating (29%). The size of the various establishments is relatively small as 57% employ 5 or less people. Very few people living with disabilities and youth are employed in these establishments. 86% of establishments only employs 5 or else people in the aforementioned groups. A wide spread variance is noted with regards to each establishments duration of operation with 29% in operation less than five years, 21% between 6 to 10 years, 29% between 11 to 20 years and 21% having operated for over 21 years.

**Table 10.4: Association Affiliation and Guest Demographics**

Where are your guests originating from?			Are your establishment affiliated to any tourism association or business chamber?		
Local (including other Free State towns)	Other provinces	Other countries	YES	NO	Specified Associations
92%	100%	77%	46%	54%	SETAs, NAA, BAA, TGCSA

Table 10.4 above shows that the majority of tourist accommodation establishments (54%) are not affiliated to any tourism associations or business chambers. Of the remaining 46%, the main associations noted are the National Accommodation Association (NAA), Bloemfontein Accommodation Association (BAA) and the various SETAs.

**Figure 10.3: Main Reasons for guests visiting Mangaung**



The main reason noted for guests visiting the Mangaung area is business tourism (93%). Medical tourism and visiting friends and relatives (VFR) accounted for 71% of the tourist visiting the area. Other reasons given by establishments for tourists to the area include weddings, guests in transit to other areas as well as guests attending funerals.

**Table 10.5: Facilities offered by establishments**

Conference/ Meeting Rooms	Business services (fax and photocopying)	Same- day laundry service	Tourist Attraction Information	Wi- Fi/Internet Access	Free newspapers	Wedding/Event services	Other
21%	57%	50%	50%	64%	50%	21%	43%

The establishments in the research sample offer a wide range of facilities, these include: conference and meeting rooms, business services, laundry services (50%), tourist information (50%), internet access (64%) and event services (21%). What is worth noting is that while 93% of the participants indicated that the main reason for guests visiting the area is business related, only 57% offer business services and even a lower percentage (21%) have meeting rooms available.

The services and facilities offered by the establishments are not limited to the fore mentioned. Others include recreational facilities such as libraries, gyms and restaurants.

**Tables 10.6 and 10.7: Marketing and Social Media**

Which marketing channels are you using to market your establishment?							
Internet	Word of mouth	Media	Books/magazines	Travel agencies	Fairs/exhibitions	Other	Other specified
100%	100%	36%	14%	50%	7%	21%	LekkeSlaap, Tripadvisor, flyers and business cards

Social Media Presence					
Facebook	Twitter	Instagram	Trip Advisor	AirBnB	Other
64%	7%	29%	36%	29%	43%

The establishments in the research participants noted the use of various channels of marketing including the internet (100%), word of mouth (100%) media (36%) books and magazines (14%), travel agencies (50%) as well as fairs and exhibitions (7%). Social media is also widely used among the participants, with Facebook being the most popular (64%). This is a positive indication of the participants' awareness of current marketing trends.

**Table 10.8.: Government Support**

Does your company receive any form of institutional support in the form of funding, incentives or grants from the South African National Government?		Does your company receive any form of institutional support in the form of funding, incentives or grants from the Free State Provincial Government?		To your knowledge, are your company details displayed on the Free State Tourism website?	
Yes	No	Yes	No	Yes	No
0%	100%	0%	100%	36%	64%

Most notable among all of the participants in the study is that none receive any form of institutional support in the form of funding, incentives or grants from either the National Government or the Free State Provincial Government. All of the participants expressed their need for assistance from government in this respect, highlighting that additional funding and incentives would assist them in providing a better service all in all.

Tourist accommodation establishments participating in the study were asked to comment on why they believed Free State despite, its centrality is lacking behind other provinces in the attraction of tourists to the province. Both the lack of tourist attractions and a mismanagement of existing attractions were notes as the main reason for this. A proposed solution to this includes forming a tourism steering committee, led by the private sector with the support of the provincial government. The proposed steering committee would ideally deal with issues affecting the tourism sector such as rebranding the Free State tourism image, issues of rezoning and illegal accommodation establishments as well as safety and security for the tourism sector.

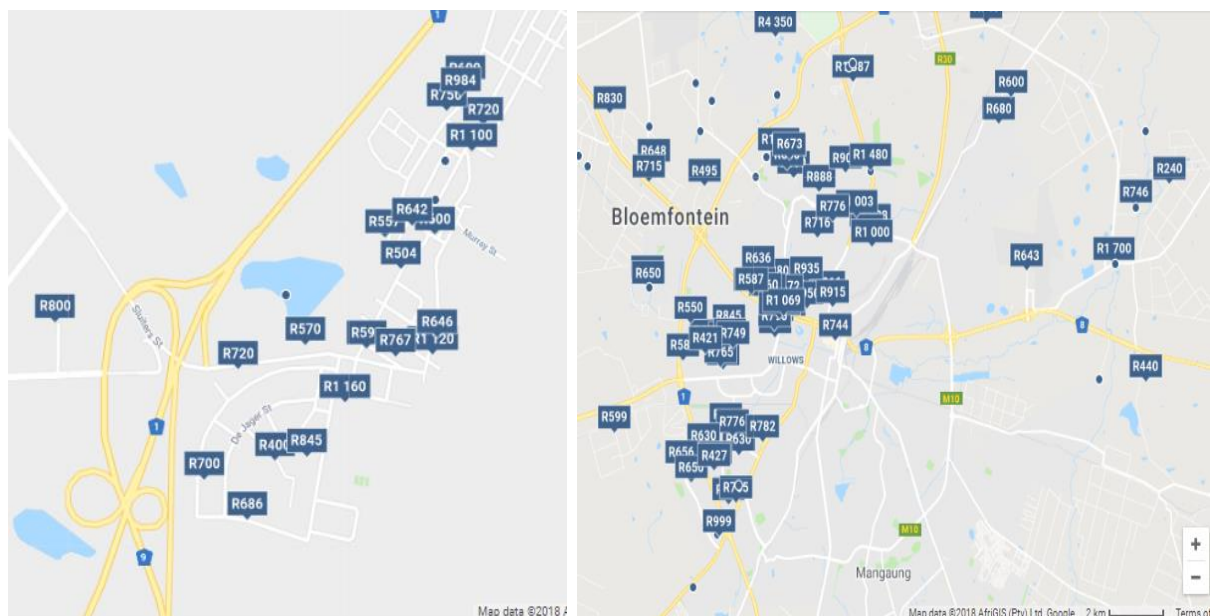
The main challenge facing the MMM include the slow paced response of the FSGTLA, the municipality and the Free State government in respect to issues that threaten the local tourism sector. These include issues pertaining, but not limited to, the distribution

of liquor licences and pace of rezoning. In addition to this, participants noted that the current transport system is not conducive to the promotion of business tourism in MMM. An example of this is that the province is one of only a few without internationally recognised transport services such as Uber. With respect to this, the proposed tourism steering committee could potentially assist in formulating mutually agreeable solutions to these problems.

The research participants unanimously expressed that they make use of local based suppliers of services. This includes the use of locally sourced materials, building equipment, furniture, transport services and local food suppliers. A common understanding seems to exist that the use of local suppliers is essential in growing the FS economy as a whole.

Major competitors to the MMM tourism area were identified as Parys mainly due to the various events which take place in the area, Clarens due to its natural scenery and Colesberg as a result of its affordable accommodation. The figure below supports the perception of the participants that accommodation in Colesberg seemingly cost less than accommodation in Mangaung. Although Mangaung has more offerings in terms number of accommodation establishments, the price range of the accommodation establishments in Colesberg is significantly lower.

**Figure 10.4: Cost of Accommodation in Colesberg vs Mangaung**



*Image Source: Google Maps Search 2018*

Among all the events that take place in the area, Macufe as well as sporting events are said to bring in the most tourists to the accommodation establishments. The tourism accommodation product owners in MMM noted that more attention and investment should be given to events such as the BloemShow and various religious events which take place in the area.

Funding, law enforcement and marketing were noted as essential for the advancement of the tourism accommodation industry in MMM.

Mixed reactions exist as to whether the MMM accommodation is up to par with national and international standards. While those who believed the local establishments meet international standards noted that exceptional service offered is the main reason for this, others expressed that a lack of funding and marketing prevent the region from meeting these standards.

## **11.CONCLUSION AND RECOMMENDATIONS**

The study has shown the importance of tourism industry in the global, national and provincial economies. The sector's contribution is both direct and indirect, through the sectors inter-linkages with various sectors in the economy. Accommodation accounts for an immense portion of the tourism contribution to the national GDP and with the government's intervention, the sub sector has the potential to increase this contribution. The following recommendations may positively contribute in changing the current status of the hospitality sub-sector:

- Institutional incentives that are currently available in the sector should be marketed to sector participants to increase their awareness of the various offerings.
- A Free State Tourism steering committee should be formed in collaboration with both the private and public sector to deal with issues pertaining to the sector such as management of the various tourism products, issues of rezoning, Uber transport services.
- Provincial tourism policy with a direct impact on tourism should be reviewed. This review should be in collaboration with the private sector, assessing the sectors actual performance vis-à-vis targets previously set.
- Measurements to curb the informal tourist accommodation sector must be made by the Free State provincial government together with the Mangaung Metropolitan Municipality. A definitive stance must be taken with regards to informal establishments such as AirBnBs to formalise these establishments.
- Workshops and networking sessions should take place between established and emerging establishments to address issues such as skill transfer to previously disadvantaged groups
- Provincial institutional support in the form of grants and incentives should be provided by the Free State provincial government to qualifying accommodation establishments
- Transformation of the hospitality subsector as highlighted in the report is to be prioritised in line with relevant national and provincial policies. These initiatives should include the promotion of entrepreneurship, education as well as

providing support for women in leadership roles at all levels whether in the public, private sectors as well as within communities.

- The tourism sector's various linkages should be supported to make the most of the sector's knock of economic effects. In this regard, efforts to train and register more tour guides, with a broad understanding of the Free State provincial tourism product, are necessary.
- The municipalities' tourism image should be rebranded, taking into account the strengths identified in the study
- Mangaung's tourist accommodation database must be updated periodically and uploaded on the provincial website.

It has been shown in the report that 50% of the accommodation establishments are not graded, while 29% of the graded establishments have a two star rating (29%). This necessitates more investments into this subsector to upgrade existing establishments to a higher star grading. The Mangaung Metropolitan area is highly rated for business tourism (93%), whilst establishments lack the proper business infrastructure as highlighted in the report. Investment in business infrastructure therefore should also be intensified.

As mentioned in the limitations of the study, the original scope of the study was narrowed down to focus solely on the Mangaung Accommodation subsector. It is therefore recommended that while the findings of this study be considered and shared among the relevant stakeholders for constructive participation, more comprehensive research should be undertaken to encompass the entire province's hospitality industry.

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## ANNEXURE A: MANGAUNG ACCOMMODATION DATABASE:

	NAME OF FACILITY	WEBSITE	CONTACT NUMBER	EMAIL	PHYSICAL ADDRESS
1.	109 Ryno Kriel	<a href="https://rynokriel-109.squarespace.com">https://rynokriel-109.squarespace.com</a>	(+27) 83 6619344		109 Ryno Kriel Avenue, Universitas, Bloemfontein
2.	21 @ Benade	<a href="http://21benade.co.za/">21benade.co.za/</a>	27842009416	<a href="mailto:21benade@gmail.com">21benade@gmail.com</a>	21 Benade Dr, Fichardt Park, Bloemfontein, 9317
3.	21 on Coetzee Guest House	<a href="http://www.21oncoetzeest.wixsite.com/guest-house">http://www.21oncoetzeest.wixsite.com/guest-house</a>	27515221650	21oncoetzeest@gmail.com	21 Coetzee Street Fichardt Park Bloemfontein 9317
4.	26 Mouline Rouge Self Catering	<a href="http://www.moulin_rougesa.com">www.moulin_rougesa.com</a>	Tel: 051-448 9938 Cell: 084 270 0248	<a href="mailto:moulinrouge-26@yahoo.com">moulinrouge-26@yahoo.com</a>	26 Andries Pretorius St, Navalsig
5.	4 On Fischer Self Catering	<a href="http://www.4onfischer.co.za/">http://www.4onfischer.co.za/</a>	0 51 436 2892	<a href="mailto:info@4onfischer.co.za">info@4onfischer.co.za</a>	4 Fischer Street Waverley
6.	56 On Lilac Self Catering		Cell: 082 303 2767	<a href="mailto:aviljoen@mimosamall.co.za">aviljoen@mimosamall.co.za</a>	Gardenia
7.	A Bed Away Self Catering	<a href="http://www.wheretostay.co.za">www.wheretostay.co.za</a>	T/F 051-422 4025 Cell:084 430 6796	<a href="mailto:mvisagie@schoolink.co.za">mvisagie@schoolink.co.za</a>	185 Klaradyn Avenue, Pellissier
8.	A Bed <b>&amp; Roses Guest Rooms</b>		727266766	<a href="mailto:abedandroses@gmail.com">abedandroses@gmail.com</a>	19 Innes Avenue, Waverley, Bloemfontein
9.	A Castle with a View	<a href="http://castlewithaview.co.za/">castlewithaview.co.za/</a>	798877095	<a href="mailto:info@castlewithaview.co.za">info@castlewithaview.co.za</a>	8 Hennie Potgieter Cres, Heuwelsig, Bloemfontein, 9332
10.	A Cherry Lane B&B / Self Catering	<a href="http://www.acherrylane.co.za/">http://www.acherrylane.co.za/</a>	723807614	<a href="mailto:info@acherrylane.co.za">info@acherrylane.co.za</a>	3 Ds Kok Street, Ferreira
11.	A La Fin Country Ranch & BB		Cell: 083 303 0242 Fax: 086	<a href="mailto:alafin@ananzi.co.za">alafin@ananzi.co.za</a> ; <a href="mailto:alafin001@gmail.com">alafin001@gmail.com</a>	1 Bonnivale Street, Ferreira
12.	A Little Guesthouse	<a href="http://www.alittleguesthouse.co.za/">http://www.alittleguesthouse.co.za/</a>	844606617	<a href="mailto:book@alittleguesthouse.co.za">book@alittleguesthouse.co.za</a>	15 Van Blerk Avenue, Bainsvlei
13.	A Steward Guesthouse		T/F 051-448 4828 Cell: 082 442 1003	<a href="mailto:astewardguesthouse@absamail.co.za">astewardguesthouse@absamail.co.za</a>	85 Aliwal Street, Waverley
14.	Aand Muzik Bed & Breakfast		Tel: 051-5222 417 Cell: 082 447 9053	<a href="mailto:info@aandmuzik.co.za">info@aandmuzik.co.za</a>	Dreyer Street, no 18, Universitas
15.	AB-Zeasty Garden Flat/Guest Room		Cell: 082 495 2097	<a href="mailto:yvonne.jacobs@parexel.com">yvonne.jacobs@parexel.com</a>	Fichard Park,

16.	Acacia Lodge	<a href="http://acacialodge.co.za/">http://acacialodge.co.za/</a>	Tel: 051-522 0519 Cell: 084 604 9053	bookings@acacialodge.co.za	77 Pres Reitz Str, Westdene
17.	Adelante Lodge Accommodation	<a href="http://www.adelante.co.za/">http://www.adelante.co.za/</a>	27514446400	<a href="mailto:info@adelante.co.za">info@adelante.co.za</a>	21 Leisegang St. Brandwag Bloemfontein South Africa
18.	Adeo + (Conferences)	<a href="http://www.a-deo.co.za">www.a-deo.co.za</a>	Tel: 051 436 2198   Fax: Cell: 074 455 0978	<a href="mailto:info@a-deo.co.za">info@a-deo.co.za</a>	13A Innes Avenue, Waverley
19.	Adri-Villa Self Catering		Tel: 051-446 4945 Cell: 082 804 4775 fax: 086 604 1412	<a href="mailto:adri@telkomsa.net">adri@telkomsa.net</a>	13 Dirk Opperman Str, Langenhovenpark
20.	Afsaal Garden House, Self Catering		Cell: 083 288 6761	N/A	1 John v/d Riet Street, Langenhoven Park
21.	Alder's Gate Bed & Breakfast	<a href="http://www.Aldersgate.co.za">www.Aldersgate.co.za</a>	Cell: 083 312 9137 Fax: 086 624 90364	<a href="mailto:info@aldersgate.co.za">info@aldersgate.co.za</a>	Avenham, Noordstad, Out
22.	Alf's Den Self Catering		Tel: 051-447 4862 Cell: 082 880 7316	<a href="mailto:ayoung@pgglass.com">ayoung@pgglass.com</a>	Pellissier
23.	Alfalfa Guesthouse		Cell: 083 645 3439 Fax: 051-446 5024	<a href="mailto:riasmit@internext.co.za">riasmit@internext.co.za</a>	11 Jan Brand Straat Langenhovenpark
24.	Alhenthia Guesthouse		Tel: 051-436 4367		6 Rayton Road, Heuwelsig
25.	Aligeo Khaya Bed & Breakfast, trading enterprise	<a href="http://aligeo.co.za/">http://aligeo.co.za/</a>	Tel. +27 51 611 0260 • Fax +27 51 611 1411  Cell +27 82 948 7107	<a href="mailto:info@aligeo.co.za">info@aligeo.co.za</a>	75 Japie Naser Uitsig
26.	Allegro Guest House	<a href="http://www.allegroguesthouse.co.za/">www.allegroguesthouse.co.za/</a>	051 436 5325 082 747 1596	<a href="mailto:manager@castelloguest.co.za">manager@castelloguest.co.za</a>	67 Castelyn Drive, Fichardtpark, Bloemfontein, 9301
27.	Altair Lodge		Tel: 051-448 2656Fax: 051-448 0085	<a href="mailto:altair@burst.co.za">altair@burst.co.za</a>	148 Nelson Mandela StrWestdene

28.	Altha Hattingh Self Catering		Tel: 051-522 8080 Cell: 072 310 2615	<a href="mailto:altha.hattingh51@gmail.com">altha.hattingh51@gmail.com</a>	63 Benade Drv, Fichard Park
29.	Alvaria Guest House / Self Catering	<a href="http://www.alvaria.co.za/">http://www.alvaria.co.za/</a>	514366669	<a href="mailto:info@alvaria.co.za">info@alvaria.co.za</a>	4 Innes Avenue Waverley
30.	Andante	<a href="http://www.andante.co.za">www.andante.co.za</a>	Tel: 079 889 5849   Fax: 086 552 5954 Cell: 079 889 5849	<a href="mailto:info@andante.co.za">info@andante.co.za</a>	Bloemendal Road 11/3 Rayton Bloemfontein 9301
31.	Annatjie's Guesthouse		T/F: 051-522 1181 Cell: 083 344 4884		19 Hudson Avenue, Fichard Park
32.	Anri Guesthouse	<a href="http://www.bloeminfoaccommodation.co.za">www.bloeminfoaccommodation.co.za</a>	T/F 051-444 0223 Cell: 083 274 8065	<a href="mailto:info@anriguesthouse.co.za">info@anriguesthouse.co.za</a>	15 John Chard Street, Brandwag
33.	Archie's Guesthouse	<a href="http://www.archiesguesthouse.co.za/">http://www.archiesguesthouse.co.za/</a>	<a href="tel:+270825583567">+27 (0) 82 5583 567</a>	<a href="mailto:dsat-bfn@iafrica.com">dsat-bfn@iafrica.com</a>	Universitas
34.	Arista Guesthouse	<a href="http://www.aristaguesthouse.co.za">www.aristaguesthouse.co.za</a>	Tel: 0514361122   Fax: 0514361122 Cell: 0826426527	<a href="mailto:nic@aristaguesthouse.co.za">nic@aristaguesthouse.co.za</a>	15 Eddie de Beer Street Dan Pienaar Bloemfontein 9301
35.	Arte Inn Guesthouse		Tel: 051-430 7667 Fax: 051-525 2180 Cell: 082 558 3567	<a href="mailto:dsat-bfn@iafrica.com">dsat-bfn@iafrica.com</a>	28 Kellner Street, Westdene
36.	At The Villa Guest House	<a href="http://www.atthevilla.co.za/">http://www.atthevilla.co.za/</a>	Tel: 051 436 8589   Fax: 0866 0220 55 Cell: 082 895 1207	<a href="mailto:info@atthevilla.co.za">info@atthevilla.co.za</a>	67 Kenneth Kaunda Bayswater Bloemfontein 9301
37.	Ayjays Guesthouse		Tel: 051-421 1559 Fax: 051-448 3927 Cell: 082 452 9659	<a href="mailto:ayjaysquesthouse@gmail.com">ayjaysquesthouse@gmail.com</a>	61 Eland Street, Fauna
38.	B&B @ 53	<a href="http://bandbat53.co.za/">http://bandbat53.co.za/</a>	Tel: 051-447 3845 Fax: 086 618 5897 Cell: 083 270 5212	<a href="mailto:Bandbat53@internet-sa.co.za">Bandbat53@internet-sa.co.za</a> ; <a href="http://www.bandb@53.co.za">www.bandb@53.co.za</a>	53 Andries Pretorius Str, Hilton
39.	B&B @ Bloem		Cell: 084 577 3226	<a href="mailto:info@mjsjordan.co.za">info@mjsjordan.co.za</a>	Universitas

40.	Bakgat Oornag	<a href="http://www.bakgatoornag.co.za/">www.bakgatoornag.co.za/</a>	079 183 5894	<a href="mailto:info@bakgatoornag.co.za;">info@bakgatoornag.co.za;</a>	35 Jac Van Rhyn Rd, Universitas, Bloemfontein, 9301
41.	Bayswater Lodge	<a href="http://www.bayswaterlodge.co.za/">http://www.bayswaterlodge.co.za/</a>	Tel: 0514361004   Fax: 0514362356 Cell: 0824133883	<a href="mailto:stay@bayswaterlodge.co.za;">stay@bayswaterlodge.co.za;</a>	80 Wilcocks Road Bayswater Bloemfontein 9301
42.	Bel Tramonto	<a href="http://beltramonto.co.za/">http://beltramonto.co.za/</a>	0834220235	<a href="mailto:admin@beltramonto.co.za">admin@beltramonto.co.za</a>	24 Frans Kleynhans Rd, Groenvlei, Bloemfontein, 9301
43.	Black Mountain Hotel	<a href="http://www.blackmountainhotel.co.za">www.blackmountainhotel.co.za</a>	Tel: 051-871 4200	<a href="http://www.info@blackmountainhotel.co.za;">http://www.info@blackmountainhotel.co.za;</a> <a href="mailto:Resmgr@blackmountainhotel.co.za;">Resmgr@blackmountainhotel.co.za;</a> <a href="mailto:resmgr@blackmountainhotel.co.za">resmgr@blackmountainhotel.co.za</a>	Groothoek Dam Road Thaba 'Nchu District
44.	Blessings Guestrooms Self Catering		Tel: 051-436 9321 Fax: 051-436 9321 Cel: 072 858 4528	<a href="mailto:blessingsgr@telkomsa.net">blessingsgr@telkomsa.net</a>	
45.	Bloemstantia Guest House Bloemfontein	<a href="http://www.bloemstantia.co.za">www.bloemstantia.co.za</a>	T: 051 436 4315 Cell:082 490 2847 F: 051 436 5313	<a href="mailto:info@bloemstantia.co.za;">info@bloemstantia.co.za;</a>	62 Eddie de Beer Street, Dan Piennar
46.	Blueberry Hill Guesthouse		T/F: 051-436 3445 Cell: 082 576 6223	<a href="mailto:alpasten@gmail.com">alpasten@gmail.com</a>	85 Paul Roux Street, Dan Pienaar
47.	Boa Vida Luxury Accommodation	<a href="http://www.boavidagesthhouse.co.za">www.boavidagesthhouse.co.za</a>	Tel: 051-444 4145 Fax: 444 4045	<a href="mailto:info@boavidaguesthouse.co.za">info@boavidaguesthouse.co.za</a>	94 Klerck Avenue Brandwag
48.	Bole's Bed&Breakfast		T/F: 051-435 3725 Cell: 083 993 6460		4002 Ps Masia Street, Bloemanda
49.	BON Hotel Bloemfontein Central	<a href="http://www.bonhotels.com/bloemfonteincentral">http://www.bonhotels.com/bloemfonteincentral</a>	27514038000	<a href="mailto:reservations@bhbloemfonteincentral.co.za;">reservations@bhbloemfonteincentral.co.za;</a>	Bloem Plaza East Burger Street Bloemfontein 9301
50.	Bounty Guest House	<a href="http://www.bountyhouse.co.za">www.bountyhouse.co.za</a>	Tel: 0514366299   Fax: 0514366299 Cell: 0827431674	<a href="mailto:bookings@bountyhouse.co.za">bookings@bountyhouse.co.za</a>	12 General Beyers Street Dan Pienaar Bloemfontein 9301

51.	Brebner Place Bed & Breakfast		Tel: 051-448 1714 Fax: 051-448 0570 Cell: 084 602 4882	<a href="mailto:brebnerplace@globalwise.co.za">brebnerplace@globalwise.co.za</a>	47 Brebner Road Westdene
52.	Calypso Lodge	<a href="http://www.fearleaf.co.za">www.fearleaf.co.za</a>	Tel: 072 310 7646	<a href="mailto:accommodation@fourleaf.co.za">accommodation@fourleaf.co.za</a>	116 van Vuuren Street Spitskop
53.	Camelia Guest House	<a href="http://www.camelia.co.za/">http://www.camelia.co.za/</a>	Tel: 0828207711   Fax: 0865596160 Cell: 0828207711	<a href="mailto:info@camelia.co.za;">info@camelia.co.za;</a>	7 Jac van Rhyn Street Universitas Ridge Bloemfontein 9301
54.	Cherry Tree Cottage	<a href="http://wheretostay.co.za/cherrytree">http://wheretostay.co.za/cherrytree</a>	Tel: 0514364334   Fax: 0865305121 Cell: 0722910336	<a href="mailto:cherry@imaginet.co.za;">cherry@imaginet.co.za;</a>	12A Peter Crescent Waverley Bloemfontein 9301
55.	Church Street Lodge SC	<a href="http://www.churchstreetlodge.co.za">www.churchstreetlodge.co.za</a>	T/F 051-430 6900Cell: 076 899 7294or 076 460 5498	<a href="mailto:churchstreetlodge@mweb.co.za">churchstreetlodge@mweb.co.za</a> ; <a href="mailto:churchlodge@cscope.co.za">churchlodge@cscope.co.za</a>	136 Church Street, City
56.	City living Boutique Hotel	<a href="http://www.city-living.co.za">www.city-living.co.za</a>	051 -444 6688	<a href="mailto:manager@city-living.co.za">manager@city-living.co.za</a> ; <a href="mailto:info@city-living.co.za">info@city-living.co.za</a>	Corner dan Pienaar drive,next to 2 robots
57.	City Lodge Hotel	<a href="https://clhg.com/hotels/105/City-Lodge-Hotel-Bloemfontein">https://clhg.com/hotels/105/City-Lodge-Hotel-Bloemfontein</a>		<a href="mailto:clbloem.gm@clhg.com">clbloem.gm@clhg.com</a> ; <a href="mailto:clbloem.resv@clhg.com">clbloem.resv@clhg.com</a>	Nelson Mandela & Parfitt Road, Westdene
58.	<a href="mailto:Cloud@96">Cloud@96</a>	<a href="https://goo.gl/q9mDkE">https://goo.gl/q9mDkE</a>	27848908900		96 Nerina Street, Gardenia Park. Bloemfontein
59.	Connie Bed & Breakfast	<a href="http://conniesbnb.co.za/">http://conniesbnb.co.za/</a>	T/F: 051-436 6129 Cell: 082 824 9783	<a href="mailto:conniesbnb@telkomsa.net">conniesbnb@telkomsa.net</a>	Louw Wepenaar Street, Dan Pienaar
60.	Constantia Guest House	<a href="http://www.constantiaquesthouse.co.za/">http://www.constantiaquesthouse.co.za/</a>	27515229222	<a href="mailto:jenet.venter@telkomsa.net">jenet.venter@telkomsa.net</a>	14 Danie Pienaar Crescent Pentagon Park
61.	Corporate Boutique Hotel		Tel: 051-406 0900 fax: 051-430 3110 Cell: 082 770 2167	<a href="mailto:info@cbhc.co.za">info@cbhc.co.za</a>	Cnr Brill & third ave Str, Westdene
62.	Cottage @ Erwee Self Catering Garden Unit		Tel: 051-448 8987 Fax: 051-447 4451 Cell: 072 125 6966	<a href="mailto:marxb@vodamail.co.za">marxb@vodamail.co.za</a>	5 Komando Erwee Str Wilgehof

63.	<u>Cottages@Moffett</u>		078 409 7858		34 Moffett St, Fichardt Park, Bloemfontein, 9317
64.	Cottonwood Guesthouse	<a href="http://www.cottonwoodbfn.co.za/">http://www.cottonwoodbfn.co.za/</a>	27760921898	info@cottonwoodbfn.co.za	124 Waverley Road
65.	Country Cabins Guesthouse	<a href="http://www.countryinnquesthouse.co.za">http://www.countryinnquesthouse.co.za</a>	Tel: 051-522 4016 Fax: 051-522 4033 Cell: 082 808 9253	<a href="mailto:countryinn@iclix.co.za">countryinn@iclix.co.za</a>	243 Pres Paul Kruger Ave, Universitas
66.	Curie Avenue Self Catering		051 522 5435 082 945 8632		58 Curie Avenue, Hospital Park
67.	Dan Pienaar Guest House	<a href="http://danpienaarquesthouse.co.za/">http://danpienaarquesthouse.co.za/</a>	Tel: 051 436 2854   Fax: 0865506316 or 051 43 Cell: 083 284 9808	<a href="mailto:danpienaar@internext.co.za">danpienaar@internext.co.za</a>	80 Genl Hertzog Str Dan Pienaar Bloemfontein 9301
68.	Dante Deo		27832904664		18 A Lilyvale Road Rayton – North
69.	De Ja Vu Guesthouse Bloemfontein	<a href="http://www.dejavuguesthouse.co.za/">http://www.dejavuguesthouse.co.za/</a>	T: 051 436 6373 A: 083 449 0957	<a href="mailto:vaneedengj1@telkomsa.net">vaneedengj1@telkomsa.net</a>	80 Paul Roux St, Dan Pienaar
70.	De la Vie Guest Lodge		Tel & Fax: 051- 5223 339 Cel: 082 808 5085	<a href="mailto:delavie@absamail.co.za">delavie@absamail.co.za</a>	44 Olive Grinter Avenue, Fichard Park
71.	De Rust Guestrooms		T/F 051-421 2310 Cell: 076 545 1980		17 Jan Enslin Street, Fichard Park
72.	De Stallen Guest House	<a href="http://www.destallen.co.za/">http://www.destallen.co.za/</a>	27730544866	info@destallen.co.za	
73.	De Witte Gastehuis	<a href="http://www.dewitte.co.za">www.dewitte.co.za</a>	Tel: 0514361169   Fax: 0514361169 Cell: 0827739359	<a href="mailto:info@dewitte.co.za">info@dewitte.co.za</a>	22 Dersley Street Bayswater Bloemfontein 9301
74.	Dejavu Guest House	<a href="http://www.dejavuguesthouse.co.za/">http://www.dejavuguesthouse.co.za/</a>	27834490957		80 Paul Roux Street Dan Pienaar
75.	Dias Guest House	<a href="http://www.diasgh.co.za/">http://www.diasgh.co.za/</a>	Tel: 0514366225   Fax: 0866060555 Cell: 0832650265	<a href="mailto:diasgh@intekom.co.za">diasgh@intekom.co.za</a>	14 Dias Crescent Dan Pienaar

76.	Die Herberg Bed & Breakfast		Tel: 051-881 4531 Fax: 011 219 7404 Cell: 083 723 3359	sonjabreed@mwebbiz.co.za	42 De Villiers Street, Winburg
77.	Die Palms Bed & Breakfast		T/F 051-522 2671 Cell: 082 928 1371	jaquire@netactive.co.za	41 Barry Richter, General De Wet
78.	Die Viooltjie Bed & Breakfast		Tel: 051-522 8947 Fax: 086 6187 405 Cell: 083 556 6541	ilze@screendeep.co.za	14 Weitz Street, Universitas
79.	Digger's Lodge & Restaurant		Cell: 072 822 6406 Fax: 051-724 0252		1 Meteorstraat, Jaggersfontein
80.	DreamScape		27760423160		2 Forsyth St, Universitas, Bloemfontein, 9301
81.	Duinerus Self Catering	<a href="http://www.roomsforafrica/sleepingout.com">www.roomsforafrica/sleepingout.com</a>	Tel: 051-446 3160 Fax: 086 657 2419 Cell: 083 256 9600	magriet@iafrica.com	9 George Du Toit Str Universitas
82.	Eeufees Lodge & Conferencing	<a href="http://www.eeufeeslodge.co.za">www.eeufeeslodge.co.za</a>	T/F: 051-436 7025 Cell: 079 521 7638/ 082 446 3329	<a href="mailto:info@eeufeeslodge.co.za">info@eeufeeslodge.co.za</a> ; <a href="mailto:eskmar8@vodamail.co.za">eskmar8@vodamail.co.za</a>	53 Eeufees Road, Baywater
83.	Ellenboy Guesthouse	<a href="http://www.ellenboy.co.za">www.ellenboy.co.za</a>	Tel: 051-433 4314 Fax: 051-433 2374 Cell: 082 770 8473	<a href="mailto:ellenboy@absamail.co.za">ellenboy@absamail.co.za</a>	114 Andries Pretorius Street, Navalsig
84.	<u>Elrido Lodge</u>	<a href="http://www.elrido.co.za">www.elrido.co.za</a>	T : +27 51 436 5251 C : +27 82 579 3743	<a href="mailto:info@elrido.co.za">info@elrido.co.za</a>	
85.	<u>Emoya Lodge</u>	<a href="http://www.emoya.co.za/">http://www.emoya.co.za/</a>	+27 51 436 8471	<a href="mailto:info@emoya.co.za">info@emoya.co.za</a> ;	
86.	Emtonjeni Country Lodge	<a href="http://www.emtonjenicountrylodge.co.za/">http://www.emtonjenicountrylodge.co.za/</a>	T/F 051-443 8030 Cell: 082 325 2824	<a href="mailto:henry@emtonjenicountrylodge.co.za">henry@emtonjenicountrylodge.co.za</a>	1 Ted Dean Street, South – Ferreira
87.	Emzini Guesthouse	<a href="http://www.emzini.net">www.emzini.net</a>	Tel: 051-525 2800 Fax: 051-525 2802 Cell: 082 560 8620	<a href="mailto:lee@worldinone.co.za">lee@worldinone.co.za</a> ; <a href="mailto:info@emziniguethouse.co.za">info@emziniguethouse.co.za</a>	29 Boersma Street, Universitas
88.	Epozini Lodge	<a href="http://www.epozini.co.za">www.epozini.co.za</a>	T/F: 051-446 3760 Cell: 072 229 0180	<a href="mailto:nolene@epozini.co.za">nolene@epozini.co.za</a>	9 Gannie Viljoen Str, Universitas

89.	Evergreen Accommodation, Self Catering		T/F 051-433 1494 Cell: 082 269 0837	evergreenaccommodation@telkomsa.net	108 Andries Pretorius Street, Navalsig
90.	Fakkkel Caravan Park, Self catering		Tel: 051-444 5213 Fax: 086 609 4205 Cell: 084 823 1496	bottru@gmail.com	212 Andries Pretorius Street, Navalsig
91.	Farmhouse Guesthouse		Tel: 051-522 7770 Fax: 051-522 3559 Cell: 074 442 5354		229 Paul Kruger Ave, Universitas
92.	Flo-Ben Guest House	www.floben.co.za	Tel: 0514367475   Fax: 0866916486 Cell: 0825715231	info@floben.co.za	3 Paul Roux Street Bloemfontein 9301
93.	Franklin View Guest House	http://www.franklinview.co.za/	Tel: 0832621245   Fax: 0866394086 Cell: 0832621245	info@franklinview.co.za	9E Innes Avenue Waverley
94.	Gabbys Cottage		051 436 6243 / 072 427 6959	gabbyscottage@gmail.com	24 Gascony Crescent, Helicon Heights
95.	Ga'echo Guest House	http://www.gaecho.co.za/	518732246	; stay@gaecho.co.za	2241, Station Road, Ratlou, Thaba Nchu, 9780
96.	Gates of Praise Self Catering	www.gatesofpraise.co.za	T/F: 051-444 4257 Cel: 083 656 0774	pswille@absamail.co.za	100 Klerck Avenue Brandwag
97.	Geluksfontein Cottage		828885235		Geluksfontein Farm, Bloemfontein
98.	Glen Country Lodge	www.glencountrylodge.co.za	T/F 051-861 2042 Cell: 082 350 2858	glenlodge@mweb.co.za	Plot 4, Riverside, no4 Small Holdings
99.	Gorgeous legends Guesthouse		Cell: 076 196 1179 Cell: 072 862 2256 Fax: 051-421 0545		253 Paul Kruger Universitas
100.	Gorogang Guest House		051 874 1480		2498 Station Road, Thaba Nchu 18, Thaba Nchu, 9780
101.	Grateful Christian GH, Self Catering		Cell: 083 354 0745	music@crearedream.com	8 Sipreslaan, Bainsvlei

102.	Grazia Guesthouse		Tel: 051- 525 2132 Fax: 051-525 2132 Cell: 082 789 2252	info@grazia.co.za	31 Schnehage Singel, Fichard Park
103.	Green Leaf Guesthouse		Cel: 083 236 8047		75 Haldon Rd, Universitas
104.	Guest Rest Guesthouse		Cell: 083 461 6707 Fax: 051-451 2282	Schuster@internext.co.za	44 A De Bruin Street, Universitas
105.	Habanna Guest House/B&B		Tel: 051-525 2246 Cell: 071 387 7734		Wilgehof
106.	Hadassa Guesthouse		Tel: 051-522 9984 Fax: 088 051 522 Cell: 082 928 4349	hadassagh@telkomsa.net	198 Pres Paul Kruger Street, Universitas
107.	Haldon Guest House	fourleaf.co.za/contactus.php	27824698404	accommodation@fourleaf.co.za	Walter Sisulu Rd, Universitas, Bloemfontein, 9301
108.	Haldonhouse Estate Guesthouse	http://www.haldon.co.za/	tel:051-523 3607	info@haldon.co.za; info@haldonestate.co.za	1 Spesery Ave, Quaggafontein, Bloemfontein, 9301
109.	Hassie's Cottage Self Catering		T/F 051-522 5607 Cell: 076 230 8692	info@hasie.co.za	
110.	Hayward's Guesthouse		T/F 051-522 3265 Cell: 082 416 9011	hayward@intekom.co.za	34 Forsyth Street, Universitas
111.	Heid's Place Guesthouse	www.heidisplace.co.za	Tel: 051-522 7067 Fax: 051-522 7067 Cell: 082 929 9750	reservations@heidisplace.co.za	48 Gustav Crescent, Fichard Park
112.	Hillside Village & the Manor Guest House, Camp	www.hillside-manor-village.co.za	T/F 051-433 2490 Cell: 072 869 2290	hillsidemanor@shisas.com	10 Piet Van Wyk Ave, Countryside, North, Out
113.	Hobbit Boutique Hotel	www.hobbit.co.za	T/F 051-447 0663 Cell: 083 305 8434	info@hobbit.co.za	19 Pres Steyn Street, Westdene
114.	Home Sprint Home	http://homesprinthome.co.za/	CELL: 084 680 0161	bookings@homesprinthome.co.za	6 Castelyn Drive Fichardtpark Bloemfontein

115.	Hotel Mamello	www.hotelmamello.co.za	Tel: 051-448 3601 Fax: 051-430 8525 Cell: 082 691 6375	info@hotelmamello.co.za	14 Roth Avenue, Willows
116.	Hudson Overnight Bed & Breakfast, Self catering		Tel: 051-522 2154 cell: 082 715 5921		26 Hudson Street Fichard Park
117.	Hydro Guesthouse		Tel: 051-448 0523 Fax: 051-447 5743	hydroguesthouse@hotmail.com	155 Kellner Street, Westdene
118.	Ibis Place Guestroom		Tel: 051-444 4144 Fax: 086 550 6995		49 Brebner Str Westdene
119.	Ilanga Estate Lodge	www.ilangaestate.co.za	Tel: 051-436 8450 Fax: 051-436 8529 Cell: 082 303 2516	info@ilanagaestate.co.za	Lucas Steyn Street, Heuwelsig,
120.	Isabella's Accommodation	http://www.isabellasaccommodation.co.za/	828089308	info@isabellasaccommodation.co.za	91 Waverley Road, Waverley
121.	Janmar Guest House		Cell: 082 441 5542		Universitas
122.	Jansti Country Cottage Self Catering		Tel: 051-433 1510 Cell: 082 853 1506		8 Marais Avenue, Estoir, Nort, Out
123.	Jedidja Bed and Breakfast	www.jedidja.co.za	Tel: 051 436 6584   Fax: 086 679 4032 Cell: 083 300 3003	info@jedidja.co.za	2A Innes Avenue Waverley Bloemfontein 9301
124.	JMD Guestroom Self Catering		Tel: 051-522 4478 Cell: 082 412 0377		11 Aucamp Street, Fichard Park
125.	Jock-Inn Self Catering		Tel: 051-444 0014		Park West
126.	Jonkershoek Guesthouse		Tel: 051-522 2519 Cell: 072 428 2659		Heberdensingel 22, Hospital Park
127.	Kammaland Self Catering	www.bookandstay.co.za	Tel: 051-522 9410 Fax: 051-444 4195 Cell: 082 563 7284	Gnmgnvcv.MD@mail.uovs.ac.za	17 Tainton Street, Fichard Park
128.	Karma Guesthouse		Cell: 082 388 1266		Univesritas

129.	Kings Halt Guest House	<a href="http://www.kingshalt.co.za/">http://www.kingshalt.co.za/</a>	825742388	info@kingshalt.co.za	132a President Paul Kruger Avenue, Universitas, Bloemfontein
130.	Kleine Eden	<a href="http://www.kleine-eden.co.za">www.kleine-eden.co.za</a>	Tel: 051 525 2633   Fax: 083 262 4169 Cell: 051 525 2991	info@kleine-eden.co.za; zanette@kleine-eden.co.za	2 Moffett Street Fichardt Park Bloemfontein 9301
131.	Kloof Lodge	<a href="https://www.klooflodge.co.za/">https://www.klooflodge.co.za/</a>	Tel: 051-447 7603 Fax: 051-44777 46	info@klooflodge.co.za	cnr Kloof & Kellner Street, Westdene
132.	Kloofeind Caravan Lodge	<a href="http://www.caravanlodgebackpacker.co.za/">http://www.caravanlodgebackpacker.co.za/</a>	: 083 270 5212	caravanlodge@gmail.com	Rem 3 Farm Waybank, Bloemfontein
133.	KO's Bed & Breakfast		T/F 051-437 2599 Cell: 083 692 6599	pam@kobed&breakfast.co.za	5549 Bloemside, Phase 2
134.	Koi Inn Guesthouse		Tel: 051-446 4839 Cell: 082 491 9443	veulah@mweb.co.za	2 Jan Brand Street, Langenhoven Park
135.	Kopano Nokeng	<a href="http://www.kopanonokeng.co.za/">http://www.kopanonokeng.co.za/</a>	27848728408	admin@kopanonokeng.co.za	14 Maselspoort Road Midway
136.	Korhaan Lodge		Tel: 051-451 1733 Fax: 051-451 2299	korhaanlodge@telkomsa.net	19 Barnie Swart Street, Bainsvlei
137.	Krige Lodge	<a href="http://www.krigelodge.co.za/">www.krigelodge.co.za/</a>	Tel:051-451 1345 Fax: 051-451 1730 Cell: 072 309 7634	adri.gvr@mweb.co.za	Krigelaan 6, Bainsvlei
138.	La Boheme Guest House	<a href="http://www.laboheme-guesthouse.co.za/">http://www.laboheme-guesthouse.co.za/</a>	27515224269	laboheme@lantic.net	159 Benade Avenue, Fichardtpark
139.	La Vie & Rose Guesthouse	<a href="http://www.lavie-rose.co.za">www.lavie-rose.co.za</a>	Tel: 051-444 1098 Cell: 083 444 5888	<a href="mailto:heldhoek@global.co.za">heldhoek@global.co.za</a>	14 Stapelberg Street, Brandwag
140.	Lakewood Lodge		Tel: 051-447 5486 Fax: 051-447 5383	mail@lakewoodlodge.co.za	cnr First Avenue & Henry Street, Westdene
141.	Laladene Lodge		Tel: 051-448 9205 Fax: 051-448 9201	info@laladene.co.za	75 President Reitz Street, Westdene
142.	lapeng lodge and guest house	<a href="mailto:werner@lapenglodge.co.za">werner@lapenglodge.co.za</a>	721525069	<a href="http://www.lapenglodge.co.za/">http://www.lapenglodge.co.za/</a>	On the R37 between Steelpoort and Lyndburf

143.	Lavender Lane Bed & Breakfast		T/F: 051-447 9529 Cell: 082 566 2242	lavenderlane.bnb@yahoo.com	7c Brill Street, Westdene
144.	Lazy Lizard Guesthouse Bloemfontein	www.lizard.co.za	T: 051 444 5076 A: 083 704 0868	info@lizard.co.za	109 Henry Street, Park West
145.	Le Bonheur Guesthouse	<a href="http://www.lebonheurguesthouse.co.za/">http://www.lebonheurguesthouse.co.za/</a>	tel:082 401 0157	info@lebonheurguesthouse.co.za	54 Deale Rd, Dan Pienaar, Bloemfontein, 9301
146.	LEGAE LA KHUMO LODGE	<a href="http://legae-la-khumo-lodge.business.site/">http://legae-la-khumo-lodge.business.site/</a>	078 566 1014		19 Oost St, Thaba Nchu, 9780
147.	Lemon Cottage Guest Room		T/F 051-522 7691 Cell: 082 853 5778	lemon@lantic.net	17 Eloff Street, Universitas
148.	Lemon n Lime Guesthouse	www.lemonnlime.co.za	Tel: 0514445555   Fax: 0514441021 Cell: 0838801349	info@lemonnlime.co.za	34 - 36 Donald Murray Avenue Park West Bloemfontein 9301
149.	Lemon Tree Guest Flat, Self Catering	www.place2stay.co.za	T/F 051-522 7573 Cell: 082 391 5511	doljac@absamail.co.za	1 Scot Crescent, Fleurdal
150.	Lengau Hotel		Tel: 051-448 1155		69 St Andrews Street, CBD
151.	Lenthass Lodge	www.lenthasslodge.co.za	Tel: 083 390 4098   Fax: 086 210 5985 Cell: 083 390 4098	info@lenthasslodge.co.za	32 Eugene Marais Street Langenhoven Park Bloemfontein 9301
152.	Lepelle Bed & Berakfast		Cell: 083 497 0189 Fax: 051-436 7255	lepellebnb@yahoo.com	
153.	Liela se Plek Bed & Breakfast		Tel: 051-522 2249 Fax: 086 684 8804		56 Casterlyn Str Fichard Park
154.	Like a Rock Self Catering Cottage		T/F 051-421 0559 Cell: 082 4004 629	sss@shisas.com	6 Blinkfospersd Str Pellissier
155.	Lily Guesthouse Bloemfontein	www.lilyhouse.co.za	T: 051 436 9446 F: 086 692 8813	info@lilyhouse.co.za	17 Dauphine Street, Bayswater

156.	Linga Longa Guesthouse	<a href="http://www.lingalonga.co.za">www.lingalonga.co.za</a>	Tel: 051-522 7713 Fax: 051-522 7793 Cell: 082 789 0169	<a href="mailto:reservations@lingalonga.co.za">reservations@lingalonga.co.za</a>	177 Pres.Paul Kruger, Universitas
157.	Little Miracles	<a href="http://littlemiracles.co.za/">http://littlemiracles.co.za/</a>	Cell: 082 852 7928	<a href="mailto:info@littlemiracles.co.za">info@littlemiracles.co.za</a>	76 Swartberg Ave Langenhoven Park Bloemfontein 9301
158.	Little Venice Bed & Breakfast		Tel: 051-421 0045 Cel: 082 884 2628	<a href="mailto:littlevenice@telkomsa.net">littlevenice@telkomsa.net</a>	263 Koedoe Street Fauna
159.	Lizbe Gastekamers, Self Catering	<a href="http://www.lizmaproperties.co.za">www.lizmaproperties.co.za</a>	Tel: 051-436 6939 Fax: 051-436 6456	<a href="mailto:elsabeaps@telkomsa.net">elsabeaps@telkomsa.net</a>	Meenthuis 20, Grassland, Faurelaan Sowden Street 6 A Waverley
160.	Lord Fraser Guesthouse		515831480	<a href="http://www.lordfraser.co.za/">http://www.lordfraser.co.za/</a>	10 De Bruin St, Wepener, 9944
161.	LOVERS INN GUESTHOUSE	<a href="mailto:INFO@LOVERSINNGUESTHOUSE.CO.ZA">INFO@LOVERSINNGUESTHOUSE.CO.ZA</a>	515340029	<a href="http://www.lovessinnguesthouse.co.za/">http://www.lovessinnguesthouse.co.za/</a>	Botshabelo-IA, Botshabelo, 9781
162.	Luxor & Highway Lodge		T/F: 051-443 8749		Kok Avenue, Ferreira
163.	Magrietjie Bed & Breakfast	<a href="https://www.magrietjie.co.za/">https://www.magrietjie.co.za/</a>	T/F 051-522 4128 Cell: 082 565 0567	<a href="mailto:magrietjie@xsinet.co.za">magrietjie@xsinet.co.za</a>	28 Van Rooy Avenue, Universitas
164.	Mamre Plek van Rus Self Catering		T/F: 051-407 7833 Cell: 076 317 7985	<a href="mailto:mamre@ngm.dws.co.za">mamre@ngm.dws.co.za</a>	20 Van Heerden weg Wilgehof
165.	Marais Akkommodasie Self Catering		T/F 051-522 5674 Cell: 072 522 1624		33 Rautenbach Street Fichard Park
166.	Margaret's Bed & Breakfast		Tel: 051-881 0192 Cell: 082 373 0173		
167.	Marlow Guesthouse		Tel: 051-443 8991 Cell: 072 248 0064		59 Ted Deanne Street, Ferreira, Out
168.	Masokolara Lodge/GH		Tel: 051-435 3300 Tel: 051-435 3301		Masokolara Lodge/GH
169.	Matanja Guest House	<a href="http://www.matanja.co.za/">http://www.matanja.co.za/</a>	27823336731	<a href="mailto:reservations@matanja.co.za">reservations@matanja.co.za</a>	74A Albrecht Street Dan Pienaar

170.	Marrakech Guest House	<a href="http://www.marrakechguesthouse.co.za">http://www.marrakechguesthouse.co.za</a>	082 5667 220 082 3044 823	<a href="mailto:info@marrakechguesthouse.co.za">info@marrakechguesthouse.co.za</a>	5 Wessels Avenue, Spitskop, Bloemfontein, Free State, South Africa
171.	Mats Artic Guest House		27768680724	<a href="http://www.matsarticguesthouse.co.za/">http://www.matsarticguesthouse.co.za/</a>	Botshabelo-H, Botshabelo, 9781
172.	Mayo Lodge, Self Catering, GH		Tel: 051-522 1098 Fax: 088 0515221098,	<a href="mailto:info@mayolodge.co.za">info@mayolodge.co.za</a>	11 Mayo Street, Hospital Park
173.	Mizpah Lodge, Sc, Gh		Tel: 051-436 2808 Fax: 051-436 6389 Cell: 082 855 0066	<a href="mailto:info@mizpahlodge.co.za">info@mizpahlodge.co.za</a>	6 Ray Champion Drive, Rayton
174.	Morgan Place Bed & Breakfast, SC		Tel: 051-448 0822 Fax: 051-448 0848 Cell: 083 301 7560 Cell: 082 550 7729	<a href="mailto:tina@vorterek.co.za">tina@vorterek.co.za</a>	12 Morgan Street, Dan Pienaar
175.	Naledi Sun Hotel and Casino		518751060	<a href="https://www.suninternational.com/naledi-sun/">https://www.suninternational.com/naledi-sun/</a>	3 Bridge Street, Thaba Nchu, Bloemfontein, 9780
176.	Namib GH, Self Catering		Tel: 051-522 8448 Cell: 083 407 6057		80 Paul Kruger Street, Universitas
177.	Natures Crest Self Catering	<a href="http://www.naturescrest.co.za">www.naturescrest.co.za</a>	Tel: 051-436 0070 Cell: 072 1803 663	<a href="mailto:info@naturescrest.co.za">info@naturescrest.co.za</a>	Gedeelte 13, Out, Rayton
178.	Naval Hill Backpackers Self catering		Tel: 051-430 7266	<a href="mailto:info@navalhillbackpackers.co.za">info@navalhillbackpackers.co.za</a>	3 Delville Road, Arboretum
179.	Nightingale Guest House	<a href="http://www.nightingaleguesthouse.co.za">www.nightingaleguesthouse.co.za</a>	723304821		56 Donald Murray Ave, Park West, Bloemfontein, 9330
180.	Nokhaya Bed & Breakfast	<a href="http://www.nokhaya.co.za">www.nokhaya.co.za</a>	Tel: 051-434 2604 Fax: 051-435 0184 Cell: 082 319 7374	<a href="mailto:info@nokhaya.co.za">info@nokhaya.co.za</a>	11472 Daniel Letsatso Street, Bloemanda
181.	NorthHill Guest House	<a href="http://www.northhill.co.za/">http://www.northhill.co.za/</a>	Tel: 0514366488   Fax: 0574369638 Cell: 0827757207	<a href="mailto:info@northhill.co.za">info@northhill.co.za</a>	14 Danie Pienaar Crescent Park Bloemfontein 9301

182.	Ntlo Yaka Lodge		Cell: 083 466 7109	laverne@absamail.co.za	Farm Usherwood, Lynchfield
183.	Odessa Guesthouse		Cell: 084 966 0200 Fax: 051-446 2700		4 Gannie Viljoen Street, Universitas
184.	Olivia Game Lodge	www.oliviagamelodge.co.za	Cell: 082 893 7359 Cell: 082 553 1922	reservations.olivia@vodamail.co.za	N1 Witfontein afrit
185.	Oppie Koppie Self Catering		Cell: 083 661 8780	hannes.otto@standardbank.co.za	12 Brand Street Langenhoven Park
186.	Orchard Guesthouse		Cell: 072 417 9283		130 Benaderylaan, Fichard Park
187.	Oudedoos Self-Catering		076 669 0609 / 082 418 9574		20 Gunn Street, Universitas
188.	Outeniqua Estate Guesthouse	www.oudeniquaestate.co.za	T/F 051-451 1592 Cell: 082 447 9982	oudeniquaestate@iburst.co.za	88 Outeniqua Avenue, Spitskop
189.	Palm Lodge	www.palmlodge.co.za	T/F 051-444 6982	bookings@palmlodge.co.za	10-12 Stapelberg Street, Brandwag
190.	Palm Pool Self Catering		Tel: 051-433 3788	palmpool@telkomsa.net	
191.	Pasteur Akkommodasie Self Catering	www.sleepsleep.co.za	Cell: 084 576 1993 Fax: 051-507 3133	gacoetzee@yahoo.com	
192.	Pebble Fountain Self Catering Guesthouse	http://www.pebblefountain.co.za/	060 983 9268	info@pebblefountain.co.za	91 Castelyn Dr, Fichardt Park, Bloemfontein, 9317
193.	Pellissier Place Bed & Breakfast	www.pellisierguesthouse.com	T/F 051-421 0738 Cell: 082 825 0934	estherw@absamail.co.za	47 Liefdeslietjiesingel Crescent, Pellissier
194.	Pentagon Guest House		514368317	phoki@mweb.co.za	2 Japie Ludick Street, Pentagon Park
195.	Petal Place	www.petalplace.co.za	Tel: 051 451 1541   Fax: 082 950 4606 Cell: 051 451 1541	info@petalplace.co.za	New Market Street Groenvlei Bloemfontein 9301

196.	Phillip Sanders Resort ,Self Catering		Tel: 051-441 7611		20 Km, East of Bloemfontein
197.	Plaas Cottage		826506466		Crawford farm,, Bloemfontein
198.	Plover Cottage Bed& Breakfast	<a href="http://plovergroup.co.za/">http://plovergroup.co.za/</a>	Tel: 051-861 2136 Cell: 083 262 0861	<a href="mailto:cottages@plovergroup.co.za">cottages@plovergroup.co.za</a>	Plot 8, Glen
199.	Poisanong Guesthouse		<u>27825809867</u>		49 Kenneth Kaunda Road, Bayswater, Bloemfontein, 9301
200.	Premier Guesthouse		<u>27514441290</u>		4 Nauhaus St, Brandwag, Bloemfontein, 9301
201.	Premeir Protea Hotel		Tel: 051-444 4321 Fax: 051-444 4322	<a href="mailto:marketing@phbloemfontein.co.za">marketing@phbloemfontein.co.za</a>	202 Nelson Mandela Drive, Brandwag
202.	President Hotel Bloemfontein	<a href="http://www.hotelpresident.co.za">www.hotelpresident.co.za</a>	T: 051 430 1111 F: 051 430-4141	<a href="mailto:reservations@rhg.co.za">reservations@rhg.co.za</a> <a href="mailto:banqueting@rhg.co.za">banqueting@rhg.co.za</a>	1 Union Avenue, Bloemfontein
203.	Primavera Guest House	<a href="http://www.primavera.co.za/">http://www.primavera.co.za/</a>	514332956		34 A Waverley Road Waverley
204.	Protea Hotel Black Mountain	<a href="http://www.proteahotels.com/">http://www.proteahotels.com/</a>	tel:051-871 4200		
205.	Protea Hotel Bloemfontein	<a href="http://www.proteahotels.com">www.proteahotels.com</a>	Tel: 051-403 8000 Fax: 051-447 7102 Cell: 082 820 8783	<a href="mailto:bloemf@iafrica.com">bloemf@iafrica.com</a> ,	East Burger Street, CBD
206.	Queen's ParkLodge Guest House	<a href="http://www.queenspark.co.za">www.queenspark.co.za</a>	Tel: 051-444 0121 Fax: 051-444 5483 Cell: 082 559 0655	<a href="mailto:queensparklodge@shisas.co.za">queensparklodge@shisas.co.za</a>	14 Parfitt Lodge , Universitas
207.	Rasekwana Home of Tourism Bed & Breakfast		Tel: 051-422 4875 Fax: 051-422 4876 Cell: 076 851 8200		47 Besembos Street, Pellissier
208.	Re Batho Bed & Breakfast	<a href="http://www.rebatho.co.za/">http://www.rebatho.co.za/</a>	tel:051-526 1524	<a href="mailto:pieter@rebatho.co.za">pieter@rebatho.co.za</a>	Grasslands, Bloemfontein, South Africa
209.	Real Time Guestthose	<a href="http://www.realtimes.co.za/">http://www.realtimes.co.za/</a>	<u>27518752022</u>	<a href="mailto:info@realtimes.co.za">info@realtimes.co.za</a>	15 Kampraath Street (cnr camp str & Kampraath str ), Thaba Nchu, 9780
210.	Reiheim Caravan Park SC	<a href="http://reinheim.co.za/contact-us/">http://reinheim.co.za/contact-us/</a>	tel:051-861 2087	<a href="mailto:info@reinheim.co.za">info@reinheim.co.za</a>	28km from Bfn along N1 at Glen/maselspoort turn

211.	Relekane Guest House		051 435 7169		14 De waal Street Ehrilichpark Bloemfontein 9312
212.	Rhythym & Blues Guesthouse	<a href="http://www.rythmnblues.co.za">www.rythmnblues.co.za</a>	10420 Zulu Street, T/F: 051-435 5418 Cell: 084 328 1217	buyelwa@ananzi.co.za	10420 Zulu Street, Rocklands
213.	Rise & Shine Guesthouse	<a href="http://www.riseandshine.co.za">www.riseandshine.co.za</a>	T/F 051-861 2039 Cell: 083 462 7522	info@riseandshine.co.za	2 DF Malherbe Drive, Universitas
214.	River of Joy Guest Farm, Self Catering		Tel:051-861 2039 Cell: 083 462 7522	riverofjoy@absamail.co.za	
215.	Roese Moes Guesthouse	<a href="http://www.greattravel.co.za">www.greattravel.co.za</a>	Tel: 051-436 4831 Cell: 083 3008 229	mlillie@vodamail.co.za	
216.	Roselaan Guesthouse		Cell: 076 422 2822	johan@flansa.co.za	Roselaan 87, Wilgehof
217.	Rubala Sleepover		tel:082 229 8361		
218.	Ruresta Flat Self Cateing		Tel: 051-446 1947 Cell: 083 259 7059		Langenhoven Park
219.	Rusplek Guesthouse Conference	<a href="http://www.rusplek.co.za/">www.rusplek.co.za/</a>	27515225008	info@rusplek.co.za	50 Scholtz St, Universitas, Bloemfontein, 9321
220.	Sangiro Lodge	<a href="http://www.sangirogamelodge.co.za/">http://www.sangirogamelodge.co.za/</a>	+27(0) 51 433 4813	stephanviljoen29@gmail.com	Kenneth Kaunda Road, Bloemfontein, 9301
221.	Schnehage Self Catering				92 Schnehage Cres, Fichardt Park, Bloemfontein, 9317
222.	Shalom Bed & Breakfast		tel:051-522 2137		22 Jacobs St, Universitas, Bloemfontein, 9321
223.	Shangri-la Bed & Breakfast		tel:082 377 8195		12 Wynand Mouton Dr, Universitas, Bloemfontein, 9321
224.	Shawu Lodge				2 DF Malherbe Drive,Universitas
225.	Shekinah Lodge		tel:051-421 1571		18 Vereeniging Dr, Fauna, Bloemfontein, 9325

226.	Silver Moon House	www.silvermoonhouse.co.za	079 703 4960 (cell) +27 51 436 0254	info@silvermoonhouse.co.za	3 Mc Murraystr, Waverly, Bloemfontein
227.	Sinai Guestrooms		T/F 051-522 4788 Cell: 083 923 7364	jkkyambadde@telkomsa.net	290 Paul Kruger Avenue, Universitas
228.	Sir Greys Guesthouse	www.sirgreys.co.za	Tel: 051-444 5460 Fax: 051-444 5435	sirgrey@mweb.co.za	32 Jock Meiring Street, Park West
229.	Skoti Guesthouse		T/F 051-434 1726 Cell: 082 391 4210	grace.molaledi@dcs.gov.za	10294 Modimogale Street, Parkwest
230.	Sleepover	www.sleepoversa.co.za	Cell: 082 424 0800 Fax: 051-421 1068	info@sleepover.co.za	12 Klaradynlaan, Pellissier
231.	Solo Gracia Guest House Bloemfontein	www.sologracia.co.za	T: 051 444 2358\ A: 083 306 9866	sologuesthouse@telkomsa.net	9 James Scott Street, Brandwag
232.	Soteria Lodge		T/F 051-436 2486 Cell: 083 445 2218		62/88 Gascony Drive, Helicon Heights
233.	Southern Sun Garden Court Hotel	www.southernsun.com	Tel: 051-444 1253	pieterve@southernsun.com	Nelson Mandela & Mellville Drive, Brandwag
234.	St Anna Guesthouse		Cell: 084 884 4020 Fax: 051-436 6404	info@stAnna.co.za	49 Eeufees Rd, Helicon Heights
235.	Stanville Inn Hotel Bloemfontein	www.stanville.co.za	T: 051 447 7471 F: 051 447 7514	stanville@global.co.za	85 Zastron Street, Bloemfontein
236.	Stone Hill Adventures Chalets & Caravan Park		tel:076 810 4620		3 Steven Rd, universitas3 Steven Rd, universitas
237.	Storyville Guesthouse	www.storyville.co.za	Tel: 051-436 7313 Fax: 086 6112 296	info@storyville.co.za	26 Innes Laan, Waverley
238.	Summerwood Country Estate Guesthouse	www.summerwoodcountryestate.co.za	Tel: 051-433 9590 Fax: 051-433 9361 Cell: 082 588 8980		3 Hoewe Street, Mimosa Par, Brandwag
239.	Sun 1 Hotel	https://goo.gl/ZNpzhT	Tel: 051-444 3523 Fax: 051-444 3825 Cell: 083 510 7274	SUN1.Bloemfontein@tsogosun.com	204 Nelson Mandela Road, Brandwag

240.	Taj Guesthouse and B&B		Tel: 051-451 1087 Fax: 051-451 1019 Cell: 083 463 0602	pardes@mailbox.co.za	2 Deanne Avenue, Bainsvlei, Out
241.	Tankersley Manor Bed & Breakfast	<a href="http://www.tankersleymanor.co.za">www.tankersleymanor.co.za</a>	Tel: 051-436 3880 Fax: 051-436 8297 Cell: 072 245 8234	info@tankersleymanor.co.za	86 A Waverley Road, Waverley
242.	Thaba Lodge, Groothoekdam Road, Groothoek		tel:051-522 6376		Moroka Hospital, Seloshesha Unit 1, Thaba Nchu, 9783
243.	Tharo Home Self Catering		Tel: 051-522 9788 Cell: 082 764 7780 Fax: 086 600 5985	tharohomes@webmail.co.za	
244.	That's It Accommodation	<a href="http://www.ufamwew.co.za/">http://www.ufamwew.co.za/</a>	tel:051-522 1503		19 Jacobs St Universitas Bloemfontein 9321
245.	The Cotton Room		27829303815		34 Peet van der Merwe, Langenhovenpark
246.	the Aha Botique Hotel	<a href="http://thesquareboutiquehotel.co.za/">http://thesquareboutiquehotel.co.za/</a>	+2751 444 3142	<a href="mailto:bloemres1@ahahotels.co.za">bloemres1@ahahotels.co.za</a>	22 Donald Murray Ave, Park West, Bloemfontein, 9301
247.	The Fourth Room Self Catering	<a href="http://www.safarinow.com">www.safarinow.com</a>	Cell: 083 441 3775 Fax: 051-444 5108	Bosmang.sci@mail.uovs.ac.za	
248.	The Golf Lodge	<a href="http://www.thegolflodge.co.za">www.thegolflodge.co.za</a>	Tel: 051 436 5370   Fax: 051 436 5370 Cell: 051 436 5199	info@thegolflodge.co.za	23 Milner Road Waverley Bloemfontein 9301
249.	The Royal Fischer Hotel	<a href="http://www.royalfischer.com/">http://www.royalfischer.com/</a>	051 433 7977	<a href="mailto:info@theroyalfischer.co.za">info@theroyalfischer.co.za</a>	65 Kameeldoring Draai, Woodlands Hills Wildlife Estate, Bloemfontein, 9301
250.	The Rest Guesthouse	<a href="http://www.therest.co.za">www.therest.co.za</a>	Tel: 051-522 2409 Cell: 073 194 2249	info@therestgusethouse.co.za	11 Gen Brand Drv General De Wet
251.	The Tredenham Boutique Hotel	<a href="https://www.tredenham.co.za/tredenham/">https://www.tredenham.co.za/tredenham/</a>	<a href="tel:0514334127">Tel: 051 433 4127</a>	info@tredenham.co.za; gavin@tredenham.co.za	
252.	The Urban Hotel	<a href="http://www.urbanhotel.co.za/">http://www.urbanhotel.co.za/</a>	tel:051-444 3142		
253.	The Village on Bains Self Catering	<a href="http://www.thevillageonbains.co.za">www.thevillageonbains.co.za</a>	Cell: 071 683 6155 Fax: 086 542 0337	thevillageonbains1@gmail.com	31 Old Kimberley Rd, Bains Game Lodge

254.	The White House Bed & Breakfast		Tel: 051-436 6170 Fax: 051-436 6107	ntutungono@yahoo.com	35 Lucas Steyn Street, Heuwelsig
255.	The Willows Self Catering	<a href="http://the-willows.co.za/">http://the-willows.co.za/</a>	514438789	bookings@the-willows.co.za	
256.	Thorn Tree	<a href="http://thorntreelodge.org/">http://thorntreelodge.org/</a>	+27 76 505 6247	bookings@thorntreelodge.org	Glenara Rd, Bloemfontein
257.	Tranquillo Oornag Self Catering		Cell: 079 387 3614 Fax: 051-451 1393		
258.	Truksvy B&B and Koffie Sjop	<a href="http://truksvy.wixsite.com/truksvy">http://truksvy.wixsite.com/truksvy</a>	0 76 768 8726		Grondpad, Soutpan, 9356
259.	Tsessebe Guest House	<a href="http://www.tsessebeguesthouse.co.za/">http://www.tsessebeguesthouse.co.za/</a>			5 Johan van Wyk Street, Bloemfontein, 9301
260.	Tuff Top Estate Guesthouse	<a href="http://www.placesofafrica.com">www.placesofafrica.com</a>	Tel: 051-441 7610 Fax: 051-441 7506	tufftop@intekom.co.za	Wilge & Steenbok Avenue, Roodewal
261.	Tuinhuis Guesthouse	<a href="http://www.tuinhuisguesthouse.co.za">www.tuinhuisguesthouse.co.za</a>	Tel: 051-446 4141	info@tuinhuisguesthouse.co.za	56 Groenewoud Street, Universitas
262.	Tuinhuis Guesthouse		tel:051-446 4141		56 Groenewoud St Universitas Bloemfontein 9321
263.	Tukha Guesthouse		T/F: 051-444 3264 Cell: 082 449 9280	khabo24@yahoo.com	8 Nauhaus Street Brandwag
264.	Tula@159 B&B				159 President Paul Kruger Ave, Universitas, Bloemfontein, 9321
265.	Tuscany Lodge	<a href="http://www.tuscany.co.za/">http://www.tuscany.co.za/</a>	tel:051-432 4326		3 3rd Ave Westdene Bloemfontein 9301
266.	Ufamwew Bed & Breakfast	<a href="http://www.ufamwew.co.za">www.ufamwew.co.za</a>	Tel: 051-522 0627 Fax: 051-522 0370 Cell: 083 287 2026	info@umfamwew.co.za	18 Pasteur Drv, Hospital Park
267.	Ukhamba Guesthouse		Tel: 051-522 6874/432 4326		189 Dr Belcher Drive, Heidedal
268.	UniRift Guesthouse		051 446 0468 / 071 986 1747	bookings@unirift.co.za	89 Koos Van der Walt, Universitas Ridge
269.	Unplugged Garden Unit, Guestroom		Tel: 051-421 1714 Cell: 082 828 5899	garischj@telkomsa.net	10 Piet Kruger Str, Fichard Park,

270.	U-Ridge Guest Unit & Self Catering		Cell: 082 200 9448 Fax: 051-522 6585	carinjffj@yahoo.com	
271.	Valentina Self Catering	<a href="http://www.valentina.hg.bfn.googlepages.com">www.valentina.hg.bfn.googlepages.com</a>	Fax: 086 514 6334 Cel: 079 495 9400	valentina@vodamail.co.za	27 General Hertzog Dan Pienaar
272.	Victorian Lodge		tel:051-447 9217	<a href="mailto:info@victorianlodge.co.za">info@victorianlodge.co.za</a>	110 Kellner St Westdene Bloemfontein 9301
273.	Villa Avianto Bed & Breakfast	<a href="https://www.villa-avianto.com/">https://www.villa-avianto.com/</a>	Cell: 083 329 4872	<a href="mailto:vanheerdencs@telkomsa.net">vanheerdencs@telkomsa.net</a> ; <a href="mailto:info.villaavianto@gmail.com">info.villaavianto@gmail.com</a>	10 Speserylaan, Quaggafontein,out
274.	Villa Bali Boutique Hotel	<a href="http://www.villabali.co.za">www.villabali.co.za</a>	Tel: 0514446606   Fax: 0514446616 Cell: 0824565931	<a href="mailto:info@villabali.co.za">info@villabali.co.za</a>	3 Gen Dan Pienaar Drive Brandwag Bloemfontein 9301
275.	Villa Bane Lodge		tel:051-522 4017		226 President Paul Kruger Ave Universitas Bloemfontein 9321
276.	Villa Deanne Guesthouse		Tel: 051-447 9737 Fax: 051-430 9327 Cell: 082 374 5037	<a href="mailto:lupcor@telkomsa.net">lupcor@telkomsa.net</a>	16 Deannelaan, Waverley
277.	Villa Favorita Hotel		Tel: 051-444 4010	<a href="mailto:favorite@intekom.co.za">favorite@intekom.co.za</a>	21 Dutton Crescent Brandwag
278.	Village Boiketlo Guesthouse& Pub		Tel: 051-434 1416 Fax: 051-434 1447 Cell: 082 446 3329		6 Goodhope Street, Ehrich Park
279.	Wabi Sabi Self Catering	<a href="http://bloemwabisabi.com">bloemwabisabi.com</a>	Cell: 083 631 3741	<a href="mailto:wabisabi@lantic.net">wabisabi@lantic.net</a>	Geuwels 4, Liefdeslietjie singel
280.	Waverly Bed & Breakfast		Cell: 082 802 3170 Fax: 051-444 5012	<a href="mailto:sport@gc.co.za">sport@gc.co.za</a>	22 B Waveleyweg; Waverly
281.	Welt Guest Units & Self Catering		tel:051-522 7895		7 Coetzee St, Fichardt Park, Bloemfontein, 9317
282.	Wen-Do-Lin Travellers Rest & Bed & Breakfast	<a href="http://www.wen-do-lin.com/">http://www.wen-do-lin.com/</a>	Tel: 051-861 2062 Cell: 083 298 1704	<a href="mailto:janz@telkomsa.net">janz@telkomsa.net</a> <a href="mailto:mcwilson@telkomsa.net">mcwilson@telkomsa.net</a>	3 Riverside, Glen, out
283.	White Rose Guesthouse	<a href="http://www.whiteroseguesthouse.co.za/">http://www.whiteroseguesthouse.co.za/</a>	tel:052-522 8374	<a href="mailto:whiteroseguesthouse@telkomsa.net">whiteroseguesthouse@telkomsa.net</a> ; <a href="mailto:Leona@mweb.co.za">Leona@mweb.co.za</a>	25 Scholtz St Universitas Bloemfontein 9321

284.	White's House Self Catering		tel:051-410 2000 / 051-436 5374		14 Whites Rd, Waverley, Bloemfontein, 9301
285.	Willa's Bed & Breakfast		Tel: 051-522 1503 Cell: 072 300 4891 Cell: 084 420 1554	kennyp@legal-aid.co.za	12 Ferreira Street, Fichard Park Fichard Park
286.	Windmill Lodge & Casino		tel:051-410 2121		
287.	Your Own World Guesthouse		T/F 051-436 4291 Cell: 073 1951 109	<a href="mailto:Mosidimodise@yahoo.com">Mosidimodise@yahoo.com</a>	45 Henry Fagan Street, Heuwelsig

