

Internationalisation of Intelligent Music Services

Kutalab Oy

James-Rawlings Ncheham Wanka

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International Business
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ABSTRACT

Tampereen ammattikorkeakoulu
Tampere University of Applied Sciences
International Business
Finance and Accounting

James-Rawlings Nchegham Wanka:
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The research seeks to investigate the possibility of South Africa's five star hotels as a potential market segment for Kutalab Oy online intelligent musical platform Mediacone and define the best market entry mode. A meagre 8% of the 102 randomly surveyed sample of nearly 350 five star hotels respond to an online survey about their music management service and position. Email proposals are sent to randomly select 12 digital signage companies requesting a possible partnership meets with two showing interests. The research goes on to assess a broad secondary data of the diversity of the country's music industry, management and competition.

Albeit the timid response, the research sees South Africa hotels and other related businesses as a suitably potential market measuring from the industry trends, stakes and future looking. Licensing is best entry mode in the market following its proprietary ownership knowledge and patented software. The research believes a revisit of the individual music market segment with the mobile app and downloads model could be a golden spot to consider too.

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GLOSSARY

CAGR	Compound Annual Growth Rate
PwcSA	Price Waterhouse Coopers South Africa
SA	South Africa

1 INTRODUCTION

The world has rapidly become a global village with the advent of technology. There is no such term in the competitive global business environment today as too small or too young to go international. You either join the trail or you re soon relegated

Within my 5 months of practical training with Kutalab, I spent time finding and sending emails to potential partner (media and digital signage companies) and customers (hotels, restaurants,) from the rapidly emerging South Africa about the possibility of a business partnership with the company and the sale of our product/services to the prospective customers. The activity precipitated concerns and a need for a closer surveillance.

My discussions with the CEO and observations saw a constantly expressed need for foreign move of the company and competing in the international market. The business has conducted 2 international market research studies – Italy in 2014 and Estonia in 2015. Irrespective of dissatisfying results of the Italy test, the two markets are still under surveillance. Also, the company’s growing margins for the past three years is equally one of the reasons to conclude that they can tussle for the international market.

Kutalab Oy is a Finnish media and technological company that creates and provides patented online intelligent musical services, digital signage, info messages, adverts and karaoke on its unified platform to hotels, bars, restaurants, pubs, public spaces, and hospitals – a prospective customer group. Its major product area, online intelligent music doped the name djonline which earned a strong reputation to customers and usually used as company name from its creation in 2008. The unique and composite nature of services on a unified platform forms its core strategy - the blue point and gives them a competitive urge in the Finnish media market amidst big media competitors in the likes of 7digital, Apple Music, Deezer, eMusic, Google Play, Groove Music Pass, iTunes, Microsoft Music Store, Musa24.fi, Napster, NRJ Kauppa Mobile, Spotify, TIDAL, VidZone, YouTube juxtaposed between each other (IPFI 2015).

Of late the growing innovative strategy and continuous product development has earned the new name Mediacone. The company was created in1998 by its founder and CEO and later changed to present shareholdings in 2004 (Kutalab Oy 2012).

The purpose of the thesis is to conduct a research on the internationalisation of the company’s online intelligent musical services – with South Africa hotel industry as case to enable management make a decision on entering the market or not. In this regard the

following main and minor questions are established and should be answered by the research.

Main research question:

Does the South African hotel industry a suitably potential market for Kutalab Oy's online intelligent musical services?

Minor research questions are:

Which is the best market entry mode for the company?

What is the music market competition in South Africa?

The scope of the thesis is to conduct a sample survey of the organization and management of music services in South Africa major hotels, analyze and establish an opinion for a market entry mode. The timing, planning and implementation stages are left with the management to decide as appropriate.

A quantitative research method is adopted based on a random sample technique of 102 five star hotels operating in South Africa. An online survey is administered to these 102 five star hotels on their music management systems. Emails and proposal letters for potential partnerships is sent to 12 randomly selected digital signage companies. This permit an in-depth knowledge and understanding of the musical play system in the hotels and how to enter the rapidly emerging market. The results are analyzed using tables, histogram and bar charts. Related developed and established theoretical and empirical literature also aids in the analyses process to ensure all the research questions are sufficiently answered.

A clearly organize research structure in essential for good understanding and for effective management decision making. Chapter 1 introduces the thesis and thesis scope, the background, objectives, thesis questions, methodology and structural build up. Chapter 2 states reasons and the different international market entry strategies, identifies, defines and presents some theories of internationalisation. Chapter 3 introduces the case company, takes a snap shot of South Africa hoteling business and the survey structure and process. Chapter 4 examines the music market, competition and analyses the data, answering all the research questions. Chapter 5 makes some discussions, state the findings and conclusions. A reference list and appendice encapsulate the work.

2 DEFINITION AND THEORIES OF INTERNATIONALISATION

Internationalisation of a business has uncountable words, phrases and synonyms that are used by academia and real business world. Internationalisation or international marketing consists of all the activities, institutions and processes across national borders that create, communicate, deliver and exchange offerings that have value for stakeholders and society (Czinkota and Rokainen, 2010)

2.1 Reasons for Internationalization

The decision to take a business and compete in the international market is a hard one considering the uncertainties and unpredictability of the target market yet it could create uncountable benefits if fully understood and exploited. A company thinking of internationalisation is often faced with the following questions: -where are we now.- Where do we intend to be in 5-10 years? - How do we intend to reach there? (Sasda, 2010)

There are many reasons that motivate businesses to go international – the drive for increased sales and profits procurement, Short and long run supplies and market securities; it enables increased innovation and management learning through expansion to foreign markets; economies and competitive advantage are derived from internationalisation.

2.1.1 Modes of Internationalisation

Strategically planning a business and evaluating the best fit for entry in an international market is imperative. This depends on factors like the nature of business activity, cost-benefit analysis of various modes and strategic positioning in foreign markets. Some firms start by directly exporting their products to the foreign market to fewer customers. Joint ventures, partnerships and strategic alliances with foreign experienced and established firms enable the firm to lease part or whole of its business without directly investing in the new market. Most firms equally make international market entry through licensing agreement. The licensee is allowed conducting business in the norms and designated pattern of the licensor through payment of a licensing fees. Technological and software providers typically sell their packages and services through this mode. It is cost effective without direct setting up of operations in entirely new market. Overtime, foreign direct investment with a foreign subsidiary is imperative as the market grows in size.

2.2 Theories of Internationalisation

There are three major theories that elicit the decision and choice of foreign direct entry of firms - Uppsala model of internationalisation, eclectic paradigm economic theory and the network model. However some firms by nature of their products/services start operations both on domestic and international scale. They're referred to as born global. Examples include high tech, media and communication companies that take advantage of launching their products through the internet infrastructure.

2.2.1 The Uppsala Model of Internationalisation

The Uppsala model or stage model of internationalisation as stated by Johansson and Vahlne (1977) is a gradual foreign markets involvement/participation of firms with growing market knowledge. Knowledge comprises general or objective knowledge (acquire through market research) and experienced or learned knowledge acquired over time through market experience.

Market knowledge brings out the opportunities, economies, benefits, challenges in foreign market and so determines the extent of commitment decisions shown in figure 1 below. The nature of operation and current market activities leverage the market knowledge and again define new commitments extend. By them, firms gradually start by exports with foreign franchises and intermediaries, foreign direct exports, and setting up of production or distributions subsidiaries and eventually creation of foreign direct investments units.

The model assumes that the extend, form and mode of internationalisation depends on the magnitude of market knowledge which is difficult to obtain due to psychic distance, that is culture, ways of life, business practices, education and language. However, this is not true today. The world has dramatically emerged to a global village coupled with the ravaging effect of the internet making information about any area to be easily researched and accessed in little or no time.

STATE

CHANGE

Figure 1 Uppsala Stage Model of Internationalisation

Their continuous review of the theory reveals that internationalisation on a large part today depends not only on the knowledge element but on industrial and social

relationships. The ability to find, build and preserve trusted business ties with foreign partners will foster firms' involvement and reduce risks amounts in foreign markets. A 2009 review saw the establishment chain as a veritable step in participating in foreign markets – a gradual and continuous entry into foreign markets through direct and indirect exports, intermediaries, franchising to a fully setup of foreign direct investments.

2.2.2 Electic Paradigm Economic Model

The extent form and pattern of internationalisation depends on ownership, location and internalization factors. Ownership in this regard is defined as those capabilities or core competences of a business to meet their current or potential customers' demand of trade mark, patency, firm specific advantage, technology, name recognition and goodwill. Ownership advantage implies the firm choses predominantly a licensing agreement in its international involvement. The licenses specific advantages include knowledge based software, patented item and intellectual properties.

Kutalab exceptionally classified patented musical software with daily thousands addition of songs of diverse genre that can be enjoyed offline and online anyway around the globe. Music experts principally select, test and classifying songs according to genre and purpose to software upgrading expert for effective and consistent functionality. This elicits the ownership function and predicts licensing as best fit for Kutalb move to South Africa.

Internalization refers to those factors that make the firm internally more competitive at domestic location than other foreign competitors or moving same activities and operation to a foreign production area. Largely, such firms would create franchise or use foreign direct and indirect export firms and intermediaries in participating in foreign markets until it becomes comparatively advantageous in producing and selling in foreign than domestic markets.

Location advantage refers to those advantages external to the firm. A suitable geographical located region with natural resource endowment, favorable political, conducive business environment and large population inevitably favours foreign direct investments.

2.2.3 Network Model of Internationalisation

This is the relationship between a business entity, management with suppliers, customers, suppliers, distributors, friends, families that facilitate the transfer of its business activities to an international market. The internationalisation process: decision, time, choice market, entry strategy and mode, therefore depend enormously on the magnitude of the bond existing between the partners in the system. Carefully finding and choosing the appropriate partner reduce risks and enables a firm's commitment of resources and delivery of right product/services in the new market. This is a whole process and involves finding feasible partners, gaining reliable information about their strength and weaknesses, narrowing to most attractive and finally to selection of most suitable one.

The applicability of the network model in Kutalab internationalisation process are as essential as oxygen is to humans. They can't launch start effectively without creation of an excellent network rapport with South Africa market and business operators.

As often said 'it is not what you know, it's who you know' is right in business internationalisation process as it underscores the importance of relationships and networking in entering and taking roots in new markets. 'Market performance of a company is dependent on the functioning of its relationships to others; volumes, market share, profits and growth depend on how the company handles its relationships.' (Hakansson and Snehota 1995, Pg 11.) . Continuously acquiring and building sustained trusted relationships is a strong measure of a company's success in its internationalisation process. Networks reduce or avert risks of new markets, make available information and knowledge of customers, suppliers, industry.

2.2.4 Born Global

The norm is most firms start operation, gain ground and consolidate the domestic market, build substantive equity and reserve and then start thinking about international markets. This is not always the case. Most small firms from launch start their operations on global market albeit very limited resources and experience. They are called born global. Some factors account for the proliferation of such firms. High Technological firms are predominantly born global e.g. .com and world wide web are launched and hosted on the internet. Their use, need satisfaction and niche market is served on the internet. However the trend and pattern has changed tremendously without

excludability. Metal fabrication, furniture processed food, and consumers products from first day of business, start sales in foreign markets (as cited by Tanev 2012) from Madsen and Servais investigations in Denmark. They emphasize unique differentiation strategies providing customized specialized products with high emphasis on product quality (Casvugil and Knight 2009). They also state that some small firms' succeed from inception as multinationals because of their ability to leverage advanced information and communication technology regions and niche markets to sell products/services.

Kutalab online technological digital content transfer can easily be accessed to use once in possession with the appropriate hardware, internet services and set up in any region or area of the world. The very nature of their product (design) and delivery (market) gives them suitably strong potentials to explore and exploit the global niche market. They portray advanced characteristics of born globals as they re hosted and serve customers using the internet. The issue at stake is how to leverage transnational coordinating offices and start reaping the benefits of born globals.

Born global managers entrepreneurial mindset influence the choice and decision to start up on a global landscape (Groen et al, 2015). Most born global entrepreneurs are excessively proactive, risk averse, aggressive, and creative in designing products, strategies, plans that enable them launch their products in local and international markets from day one.

3 Case Introduction, Kutalab Oy, South Africa Five Star Hotels and Survey

This chapter introduces the case company, South Africa and its five star hoteling business and state the survey method and procedure.

3.1 Case Introduction

Kutalab Oy and author agreed on assignment to carry on a market research survey in verifying the authenticity of South Africa's five stars hotels as potential market and assessing the best market entry mode of its online intelligent music services. The exercise was due to run from November 2015 to April 2016. The goal was to provide management with objectively clear information that will aid a decision making process on moving its business to South Africa.

Online electronic surveys of 20 questions are administered to some 102 South African five star hotels on a continuous basis and follow-up emails to 12 digital signage companies. The results are presented and analyzed using simple written text, tables, diagrams, charts and measuring scales to make it more effective and understandable. The process by end should enhance management's knowledge about the activities of the music market in South Africa's five star hotelling business and foster its decision plan on making a debut to the market.

3.2 Kutalab Oy

Kutalab is Finnish technological media company that was founded in 1998 by the present CEO Pablo Harju. The company has experienced drastic organisational and product/technological changes from inception to date that have placed them at very competitive level in the Finnish media market. A series of organisational structure and restructuring have seen the birth of pineskar, change in shareholdings, product name djonline to mediacone. It has work force of 6 including the CEO. The company serves over 250 customers ranging from nightclubs, bars, hotels in Tampere, Turku, Helsinki, Oulu.

Kutalab has survived over the years because of its continuous innovative strategy, coupled with the application of CEO's international experience and competence. There is a continuous monitoring of industry trends and tests of latest innovative ways of delivering their product and services. At first sight of the name 'Kutalab' kuta referring to a small village where the CEO's mother lived at outskirts of Tampere and 'Lab' - a literally imagery of tests, experiments, its core propositions are inevitably evoked.

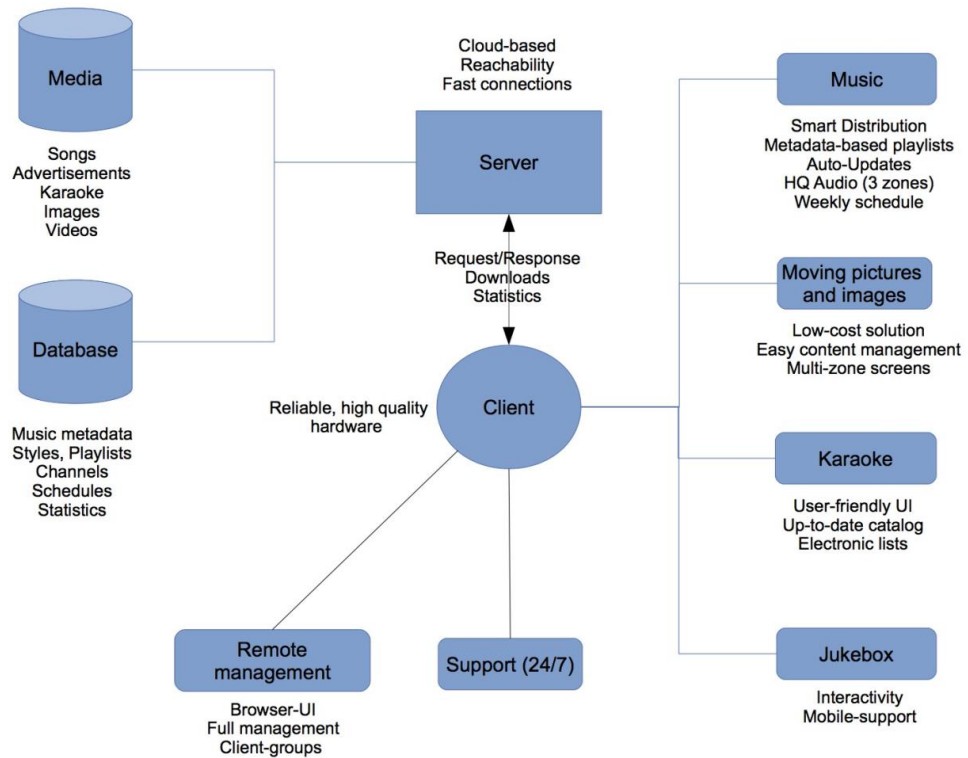


Figure 2 Kotalab Oy Platform: adapted from Kotalab's price quotation to Alexela

Kotalab major product/services as depicted in figure 2 above include; audio and video contents, karaoke, digital signage services, jukebox. It's also a veritable advertising channel for clients. All running on a unified platform are access offline and online. They also offer extra professional services on request in compilation of playlists.

3.3 South Africa's Five Star Hotels

South Africa is located at the tail of the African continent and popularly referred to as the rainbow country because of its cultural diversity. With estimated population of about 56 million inhabitants, the country is highly reputed for its wide touristic attractions with an annual influx of tourists across the globe to visit its leisure, resorts, wildlife parks, business meetings and the Robben Island where the first democratic president of South Africa Nelson Mandela spent 18 of his 27 years imprisonment (PwCSA, 2016). The PwCSA report reveal a top 10 global visitors from the United Kingdom, US, Germany, France, Netherlands, Australia, India, China, Canada, Italy in 2015. Domestic travel has equally been at peaks with a 4.3%, 1.7% rise in 2014 and 2015 respectively. These visitors spend most of their leisure and business trip moments in SA's over 2000 beautiful hotels especially the five stars brand because of its explicit comfort and competitiveness.

Five star hoteling brands in South Africa constitutes 5% of all hotel rooms and 15 % of total room revenue in 2015. Albeit a meagre 5% room ratio, five stars total room revenue stood at 138 million euro in 2015 and expected to rise to 269 million euro implying a rise in market share by 20% CAGR in 2020. Average room rate stood at 155 Euro in 2015 and expected to rise at 7.7% by 2020 (PwCSA, 2016)

3.4 Structure of Survey

The survey is designed to answer research questions and solve present doubts about the SA music market. Open and structured questions are used to obtain substantive objective answers that enable researcher establish a statement about the suitability of SA five star hotels for Kutalab's intelligent music platform - Mediacone.

A representative sample of 102 five star hotels is randomly selected from about 350. The researcher ensures this sampling method would give a real representation of all the five star hotels in the country.

Follow up Emails are sent to find out about potential partnering with the company in South Africa. Email proposal are sent to randomly selected 12 digital signage companies in South Africa. They re asked about their willingness to share knowledge and work as partners. Emails embody detailed description the company's product, clearly defines the goals and responsibility of each partner, 'do and do not' and sharing of proceeds. Replies, feedbacks, discussions and agreements are followed and documented as appropriate to provide a sound base to form an opinion about the presopposed market entry mode.

An evaluation of the SA music landscape, the genre, industry and competition is reviewed and used to compliment the online survey and email requests

The research reliability and trustworthiness is checked. Reliability measures the consistency of the research. That is if same research was conducted by another researcher it should give same results. Validity verifies the objectivity of the research questions, the survey questions in context. Are they valid to the research?

The research therefore employs primary research method for the online survey and a qualitative approach for emails and industry analyses. 20 questions administered to

South Africa's five star hotels to obtain responses on their organization and management of musical services and opinion about Mediacone. The first two questions assess level of product awareness, Third asks if hotel has a musical plan or policy answers 'yes' or 'No', Questions 4-6 investigates their current musical sources and supply, 7-9 enquires about their costs? 10 asks who manages the music playing in hotels with answers ranging from 'Any staff', 'Permanently hired DJ or music curator' 'Music software supplier mostly on phone and online' 'hired professionals only on special occasions' and 'any other be specified' Q11 asks who supplies hardware eg speakers and media players? Q12 enquires about the location of speakers as this determines the strength or diffusion of sound playing 'anywhere in the building' 'deeply fitted on walls, ceilings' 'other to be specified' while Q13 assesses the reliability and efficiency of internet services on scale 1-5. Q14-16 appreciates the perception and appreciation of musical genry and significance to business. Q14 do you mind the kind of musical sound playing in your business premises for example at the receptionist, common area, spar, bar, pool and or conference room at any point in time? 'Yes' 'No' 'May be, may be not', 'Sometimes'. Q15 Overall, how significantly is the kind of musical sound playing in these business areas in Q14 at any point in time? 'Very significant' 'significant' 'fair' 'insignificant' 'very insignificant' Q16 Generally speaking, musical sound has a tremendous effect in enhancing brand image, services and or business value proposition; 'Strongly disagree', 'disagree', 'neutral', 'agree', 'strongly agree'. Q17 Inquires about major problems faced in music play process? 'High Cost', 'system failure', 'absence of some desired tracks', 'poor sound quality', 'lack of music expert', 'others to specify' Q18 would you use media cone? 'Yes' 'No' 'May be, may be not' Q 19 is an open question on the major features cherished or disliked about mediacone and Q 20 another open question on any other comments or reactions.

4 Internationalisation of Intelligent Music, Competition and Data Analyses

A large pool of platforms ranging from sophisticated web databases, web radios, from which track and records can be accessed, downloaded and enjoyed free or purchased to a more recent livestream online TV styled. Intelligent music apparently is fast taking roots following from some online web radios and channels. Hotelradio.fm, Ambianceradio.com, DDJMedia.nl are building focus in intelligence delivery. A Canadian leading music company Stingray systematically build physical integrated electronic play systems and intelligence playlists for businesses, offices, companies, hotels, restaurants and individuals.

4.1 South Africa Music Market

Musical play constitutes a large part of entertainment in the South Africa's hospitality business following from the very nature of the services. The South Africa music industry supply has developed rapidly due to high internet connectivity, improved broadband and well developed mobile internet plans – 3Gs, 4Gs by over ten network service providers and rate of mobile gadgets, smart phones and musical play device affordability (PwCSA, 2016)

Table 1 Revenue from Internet Adapted from PwC SA 2016 Report

Revenue from Total Internet Access 2010-2019 (Million Euro)													
Category	Historical data				Forecast data								CAGR
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2014-19		
Fixed Broadband Acces	1,815	2,162	2,356	2,521	2,782	3,129	3,532	3,928	4,302	4,655	10.8		
YOY Grwoth(%)		19	9	7	10	13	13	11	9.5	8			
Mobile Internet Acces	4,347	6,151	9,080	13,970	18,547	23,294	28,338	33,675	39,322	45,307	19.6		
YOY Grwoth(%)		42	48	54	33	26	22	19	17	15			
Total	6,161	8,313	11,436	16,491	21,329	26,423	31,871	37,603	43,624	49,962	30		

PwCSA identified 1,5million fixed broad band internet users and 19, 5 million mobile internet subscribers in 2014. The figures are expected to see a surge by 2,3 and 38 million respectively by 2019. Average cost of residential broad band is 16.3 euro/month - almost twice the cost of mobile internet subscription 9 euro in 2014. The report states this projected difference will still not narrow down any significantly by 2019 implying most people will continue to access internet in South Africa through mobile devices as shown by a significant rise from 37% in 2014 to almost 70% by 2019. Growing trends in consolidation and collaborations of network providers have also resulted in new strategies and specialized bundle of packages to consumers.

Free public Wifi networks are finding their way in major South Africa cities, Pretoria, Cape Town regions will only advance and increase the access threshold of internet and accompanied services without excludability of music access and online downloads.

Initiatives funded by a combination of national and local government and non-governmental organizations in line with broad band targets and digital inclusions policy objectives (PwCSA, 2016). The statistics further recarps that smartphones and tablet internet penetration rate demonstrates massive user rates from 23million and 3million in 2014 to an overwhelming 52 million and 6 million at end of 2019 respectively as shown in Figure 2 below only giving more evidence of a growing individual music consumption market potential for downloads, subscriptions and general access of online and offline contents.

Table 2 SA Mobile Connectivity adapted from PwC SA Report

SMART PHONES CONNETIONS AND ACTIVE TABLET DEVICES(MILLIONS), MOBILE INTERNET CONNECTION(%)									
	2012	2013	2014	2015	2016	2017	2018	2019	
SMART PHONES CONNECTIONS(M)	12	18	23	28	34	40	46	52	
ACTIVE TABLET DEVICES(M)	1	2	3	4	4	5	5	6	
MOBILE INTERNET CONNECTION(%)	20.6	28.3	36.6	45.5	53.3	59.5	64.4	69.1	

This does not mean laptops and PCs are no more in use. Businesses, organizations largely utilize these devices for download, play and management of their music.

Kutalab intelligence music software whose customers are predominantly businesses, bars, hotels, restaurants and shopping malls runs on licensed Macintosh desktops and notebook once installed. The tested individual ‘Djonline’ mobile app on windows OS in 2008 was not further developed nor launched in the largely dominated individuals’ Finnish consumption market by Spotify.

4.1.1 Competition

Advertisement, entertainment, mobiles, electronic media players and leisure industry have great interconnections with the music business and are contributing enormously to the explosion of South African economy. The industry has revolutionized almost entirely from physical – recording, storage and distribution to digital formats.

The production, marketing and distribution of music in South Africa are conducted by both home and major multinational recording companies with subsidiaries in South Africa. Recording industry of South Africa (RISA) and the Southern African Music Rights Organization (SAMRO) are responsible for the development of the recording

industry, copyrights and licenses fees collection respectively in the country. Global recording and distribution giants - Universal Music Publishing, BMG, Warner Chappell Music and Sony (acquiring EMI Music publishing) are key players in the development and advancement of international and South African repertoire by adapting rapidly to the digital and livestreaming trends.

South Africa's key industry players in the digital music services either offer one or combined of download services, subscription services, ad supporting and physical CDs formats services as represented by table 3 below to its music fans and lover.

Table 3 Classification of Musical Services in SA adapted from Promusic.org

Classification of Music services in South Africa			
Download services	Subscription services	Advertising support Services	Physical formats
Google play, iTunes, Mitracks, MTN Play.	Apple Music, Deezer, Google play, The Kleek, Liedjie, MixRadio, Rara.com, Rdio, Simfy, Tidal	Myspace, VIMEO, YOUTUBE	CDs, vinyl, iPod, memory stick

The SA Music Industry generates revenues from direct online downloads, subscription fees, licenses, royalties, advertising support services, live music concerts and festivals organized annually in different venues across the country

A PwCSA (2016) report shows great indicative key performance results - increase in live music and digital revenue. Although the market continued to see a decline 3.3% year on year in 2014 compared to 2013, annual revenue however will rise at modest 1.3% CAGR over the next 3 years and will total a projected 138 million euro in 2019. Digital will take the lead giving a projected 20.3 million euro (9.3% CAGR) in 2019.

Download sales rose in 2015. Digital unit sales will rise at a CAGR 2.4% to ending 2019 at 12.8million units. However sale of download peaked in 2015 and fell away annually (see Table 4 below) as consumers switch from ownership to access modes.

Mobile formats provide over half of all digital trade revenue up to 2012. However lower ring back tones and ring tones sale will reduce the share to just 14% in 2019. Reasons

for decline perhaps transition high internet, different fixed broad band and specialized mobile internet packages made access free (PwCSA, 2016). Albeit decline in physical format, growth in digital sales will only by-pass physical in 2019. Sales of digital peaked in 2015 and fell again annually due to consumers switch from ownership (subscriptions, downloadable and transfer of music files) to access models – YouTube, livestreaming enhanced by efficient internet services.

Table 4 SA Music Revenue adapted from PwC 2016 Report

SOUTH AFRICA MUSIC REVENUE, 2010-2019 (MILLION EURO)											
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	
Physical Format	938	828	747	625	504	419	351	295	247	198	-17
Digital Music	938	828	747	625	504	419	351	295	247	198	9.3
Downloads	938	828	747	625	504	419	351	295	247	198	2.4
Mobile	938	828	747	625	504	419	351	295	247	198	-0.4
Streaming	938	828	747	625	504	419	351	295	247	198	33.7
Total recorded music	1,875	1,656	1,493	1,250	1,008	838	703	590	493	396	
Live music ticket sales	404	436	467	497	532	570	614	663	719	776	7.8
Live music sponsorship	404	436	467	497	532	570	614	663	719	776	8
Total Live music	808	872	934	994	1,063	1,139	1,227	1,326	1,438	1,551	
Total Music revenue	1,871	1,653	1,491	1,246	1,008	838	704	593	496	396	0
YOY Growth(%)		-4.4	-3.2	-2.7	-3.3	-0.8	-0.1	1.6	2.9	2.8	

Retail shops in South Africa shut doors giving way to download. Musica for example closed several retail outlets in 2014 and 2015 (PwCSA, 2016) due to transformation from the physical CDs usages to digital formats; Apple music and its iTunes saw massive subscription in its 2012 entry in the country. Most mobile internet subscribed individuals use major international download services Deezer, Rara.com and Tidal.

Monthly subscription fees for major international brands include - Deezer 4 euro a month, Mix Radio 1.6 euro a month, Simfy 4 euro, Tidal 9 euro. Rara.com, MTN Music+ have dynamic packages and still at launch phases. The Kleek formed a 2 years partnership with Samsung but runs only Samsung android handset. All subscription services available online or mobiles with high level subscription and increased possession of smartphones will drive subscription sales upward and fuel an estimated CAGR of 33.7% through to 2019.

Surprising to note is the fact that international repertoire dominates the local market – accounting for 61.8% in 2014, 62.5% in 2013 of trade value (55.2% units against 44.8% for local repertoire). International priced more than local repertoire accounts for the

faster growth in foreign repertoire revenue relative to local content. South African parliament in efforts to promote home repertoire has passed a law requesting review of local content policy by department of Trade and industry and encouraging local radio and television media to play local repertoire (PwCSA, 2016).

Live music events demonstrates lots of resemblances with Western system of Organization than its other African counterparts. Live Nation operates in South Africa in partnership with local promoter Big Concerts. Pharrell Williams's tours, Mumford & sons 2016 tours saw instantaneous purchases of tickets once they were opened online. While largely recognized international names make tours, smaller home based artists also find their way to stage. Seed experience is the mastermind of shows in the likes of Ben Howard and George Ezra with live performances in the cities of Durban, Cape Town, and Johannesburg. A 2014 Concert South Africa published report Song Lines: Mapping the South African Live Performance Landscape will enable development and hosting of major local and international live events. The growth rates of recorded live music continue to divert consumer spending to live music. Spending on live music overtook spending on recorded music in 2014 and the difference in fortunes of the two sectors will result in a widening of the gap in the next three years. Live music revenue will grow at a CAGR of 7.9% in the next three years, reaching 98.3 million euro in 2019 up from at a 66 million euro in 2014 (PwCSA, 2016).

All in all, the SA music industry has a promising future but not without setbacks. The growth in internet accessibility, free trial model, free access medium – YouTube for example tremendously affect licensed music consumption rates. This is a global crisis that is seriously affecting the music industry (IFPI, 2016) without South Africa exclusion.

4.2 Data Analysis

The data obtained from the survey is analysed independently to illustrate the state of activities in SA five star hotels. An online survey was administered through survey-monkey.com for 3 months (i.e. from the 9th January to 9th March 2017) to 102 five star hotels. The survey recorded a meagre 8% response rate (8 hotels). On the other part barely 2 (17%) of the 12 contacted digital signage companies for a possible partnership expressed interest working with the company. The 8% survey low response rate and 17% of potential partner companies gives an extremely low validity rate for the research

and so cannot be significantly assumed to be a real representation. The results of the survey are analysed in the following tables, pie charts and histograms.

The first two questions were aimed at checking the level of product/Service awareness as shown in table 5 and 6. The results show a low level of customer awareness of offering in the target market. This implies that a huge and appropriate advertisement campaign media is necessary to enhance the level of its product awareness.

Table 5 Product Awareness

Q1. Have you Heard of Media cone?		
Answer Options	Response Percent	Response Count
Yes	12.5%	1
No	87.5%	7
Answered question		8
Skipped question		0

Seven (87%) of the eight hotels in Table 5 above state they have not heard of media cone before.

Table 6 Awareness Channel

Q2. Where did you first hear of Media Cone?		
Answer Options	Response Percent	Response Count
Internet	0.0%	0
Website	14.3%	1
First time	85.7%	6
Other (please specify)	0.0%	0
Answered question		7
Skipped question		1

A single respondent shown in Table 6 above heard (14,3%) of the product from its webpage most probably through an email contact against 85.7% who have never heard of it before. Effective advertising and product positioning strategy is imperative. Web marketing has to be improved upon. Specialised direct emails about product to individual hotels can create more leads. Short product video on webpage and online trial versions will enable full understand of the product's functionality.

The third question asked if the hotels have a comprehensive music playing plan. All seven respondents indicate a 100% yes on figure 3 below. Music is as vital as enhancing the customers comfort during visit and stay in the hotels and so purchasing appropriate devices, genre and sound management by the hotels becomes inevitable.

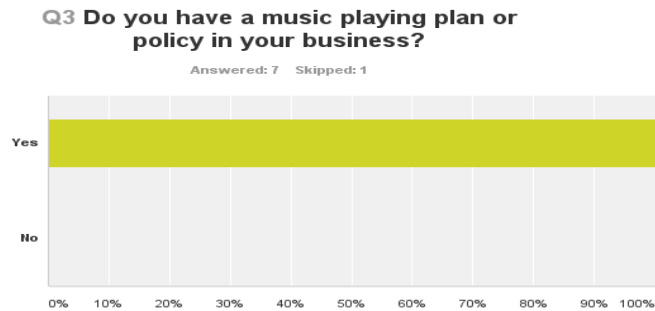


Figure 3 Own Music plan

Question 4 attempts to find out where the hotels get supply of the different genre of music playing in their premises as represented by figure 4 below.

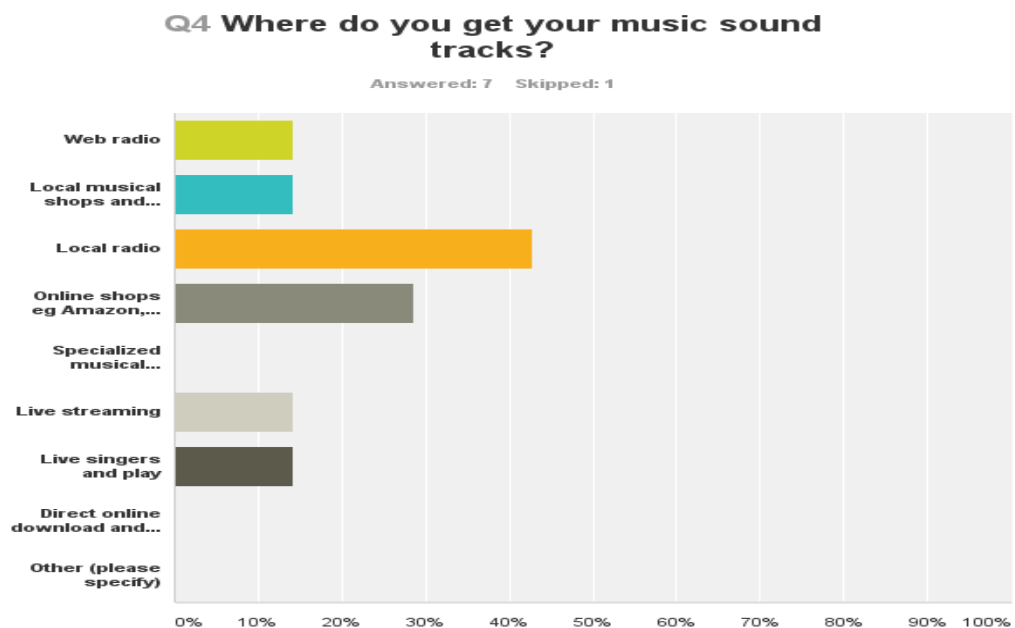


Figure 4 Music Source

42.9% (3 of the seven) who responded to this question say they tune to local radio, 28.6% (2 hotels) say the purchase directly from online music databases like Amazon, Spotify and Napster. Others indicate they use web radio, live stream, from online databases and purchases from local musical shops and stores.

Table 7 Music Source

Q.4 Where do you get your music sound tracks?		
Answer Options	Response Percent	Response Count
Web radio	14.3%	1
Local musical shops and stores	14.3%	1
Local radio	42.9%	3
Online shops eg Amazon, Spotify, Napster	28.6%	2
Specialized musical software from supplier	0.0%	0
Live streaming	14.3%	1
Live singers and play	14.3%	1
Direct online download and play eg YouTube	0.0%	0
Other (please specify)	0.0%	0
answered question		7
skipped question		1

No hotel was willing to disclose the name and costs of licensing fees, how much spend on live singers, local or web radio events if at all they were using specialized software in Question 5, 7 and 8. One hotel however (table 8 below) reveals an estimated monthly expense of about 200 Euro of all music services. Kutalab's in high cost Finland monthly service fees falls within range 150-700 euro. Mirroring the price in South African context apparently will need some adjustments and consideration especially during the launch of product.

Table 8 Total Monthly Expense

Q9. In total about how much do you spend monthly on the acquisition and management of music in your business premises (Eur) ?		
Answer option	Response count	Response Text
Answered question	1	
Skipped question	7	
Number	1	200 Euro

Question 10 seeks to find out who manages the selection, composition of playlists playing in the different hotels. 2 on 6 respondents say any staff can do and 4 say they

hire professionals from time to time in response to need and occasions. A most probable reason why about 43% of the hotels in Q4. decide to tune to local radio during normal business days. The parliament’s decision for local radios and media promotion and play of home repertoire is also a more likely reason.

Table 9 Managing personnel

Q.10 Who manages the selection and collection of your playlists?		
Answer Options	Response Percent	Response Count
Any staff	33.3%	2
Permanently hired DJ or music curator	0.0%	0
Musical software supplier mostly on phone and online	0.0%	0
Hired professionals only on special occasions	66.7%	4
Other (please specify)	0.0%	0
<i>answered question</i>		6
<i>skipped question</i>		2

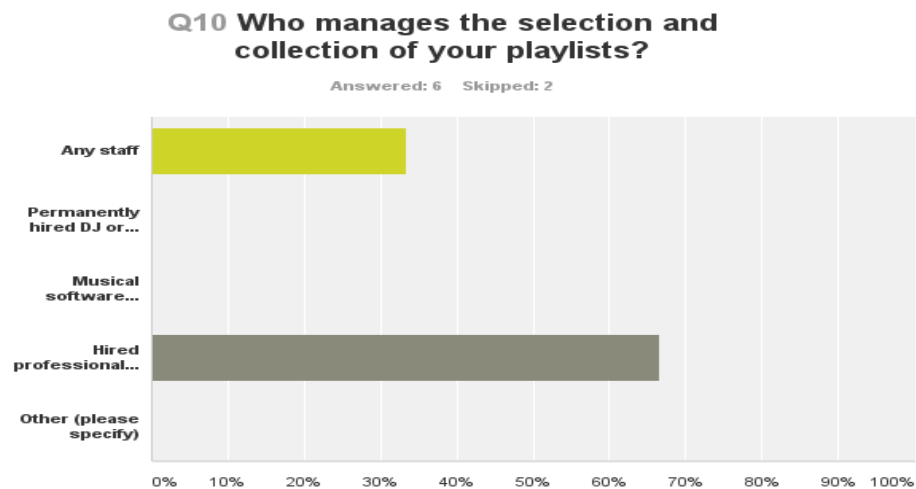


Figure 5 Managing personnel

Question 10 seeks to find out who manages the selection, composition of playlists playing in the different hotels and 2 respondents (33.3%) in figure 5 above say any staff can do and 4 respondents (66.7%) say hired professional from time to time are responsible for the management and play of musical sounds.

Questions 12 represented in figure 6 below enquired where the hotels speakers are located in their premises. All 4 respondents in figure 6 below to this question say they re deeply fitted on walls and ceilings for effective sound diffusion in the targeted area.

Q12 Where are your speakers located in your business premises?

Answered: 4 Skipped: 4

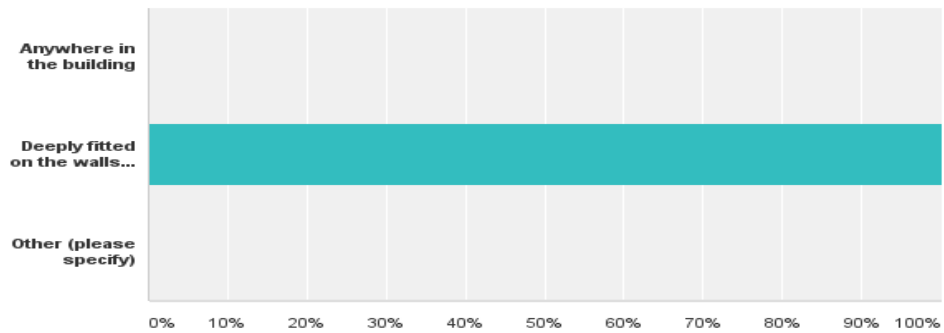


Figure 6 Location of speakers

Question 13 by a single respondent declares an excellent reliability and efficiency of internet service connectivity shown in figure 7 below.

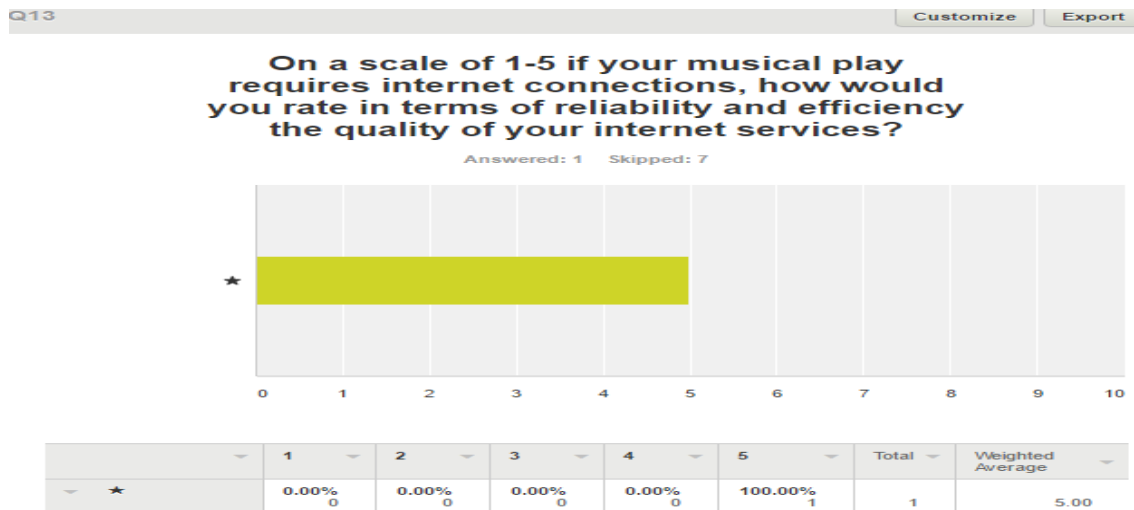


Figure 7 Internet Reliability and Efficiency

This is further enhanced by an overwhelming connectivity rate in the whole country through differing mobile data plans, fixed broadband, the government - NGO global connectivity inclusion policy and the figure keep growing as reported by PwCSA (2016).

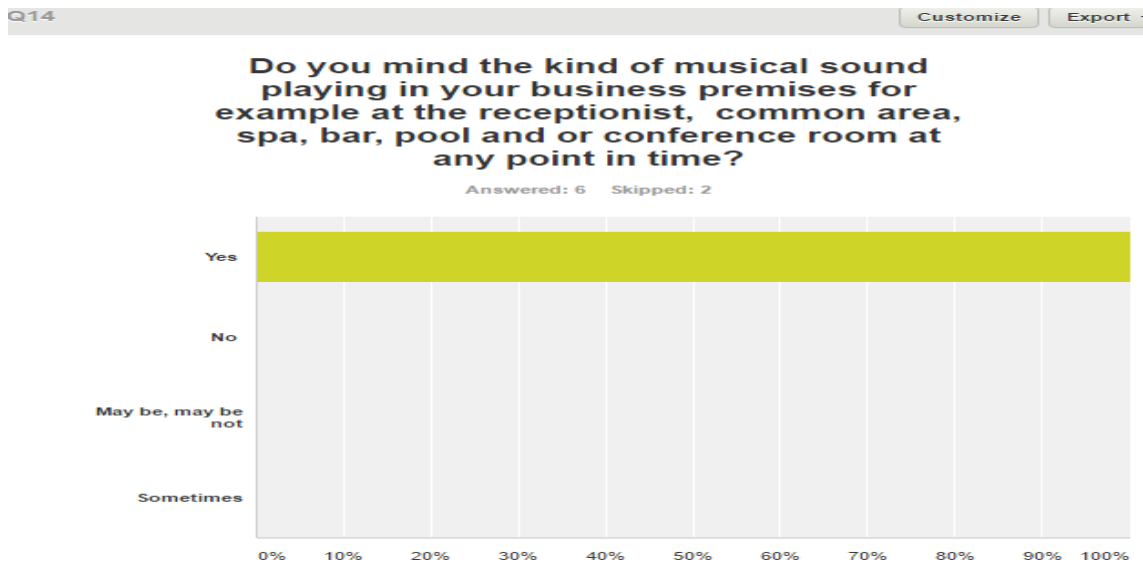


Figure 8 Understanding usefulness of Intelligent Music

A 100 % result of 6 respondents in Q 14 and Q15 reveal they have full knowledge and agree the genre of music that plays in different area at particular time in the hotel have a very significant effect in enhancing the customers’ total experience in their premises. Q 16 in figure 9 and table 11 below further gives impetus by all 6 respondents that musical sound in general terms has an invaluable effect in enhancing brand image, services and business value proposition. Question 15 assesses the impact of musical intelligence. All six respondent acknowledge a tremendous impact on the right music in a the right place in the hotel premises as shown in Table 10 below.

Table 10 Impact of Intelligent Music

Q.15 Overall, how significantly is the kind of musical sound playing in these business areas(Q14) at any point in time?						
Answer Option	Very significant	Significant	Fair	Insignificant	Very insignificant	
	6	0	0	0	0	
Answered						6
Skipped						0

Q16 Generally speaking, musical sound has a tremendous effect in enhancing brand image, services and or business value proposition

Answered: 6 Skipped: 2

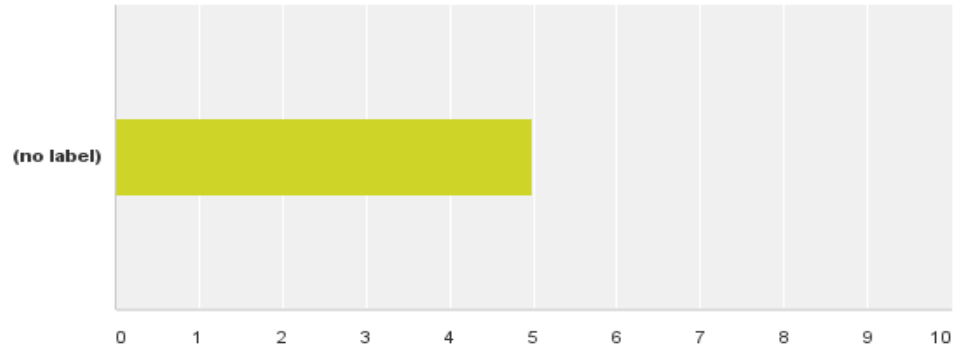


Figure 9 Impact of Music sound

Musical sound has an undeniable impact on the business brand image, services, value proposition and the business area in general as shown in figure 9 and Table 11 below.

Table 11 Impact of Music sound

Q.16 Generally speaking, musical sound has a tremendous effect in enhancing brand image, services and or business value proposition						
Answer	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree	Rating
Option	0	0	0	0	6	5.0
Answered question						6
Skipped question						2

Question 17 inquired about the major problems faced by these hotels in their musical play process. 3 of the 5 hotels who answered this question complained absence of some desired tracks and 2 others from time to time have had system failures. Though systems failure sounds more general in itself, issues like wrong devices and mechanical breakdowns are amongst the problems in this light. Kutalab’s licenced intelligent software runs on licensed window operating system with regularly updating anti virus system/support on phone and email 7/7, 24/24 and experts visits depending on the circumstance. Rarely have customers complained of system breakdowns and failures as measures are put in place to ensure a non-stop play system.

Table 12 Problems in Playing process

Q.17 What major problems do you face in your musical services?		
Answer Options	Response Percent	Response Count
Costs	0.0%	0
system failures	40.0%	2
Absence of some desired tracks	60.0%	3
Poor sound quality	0.0%	0
Lack of music expert	0.0%	0
Other (please specify)	0.0%	0
<i>answered question</i>		5
<i>skipped question</i>		3

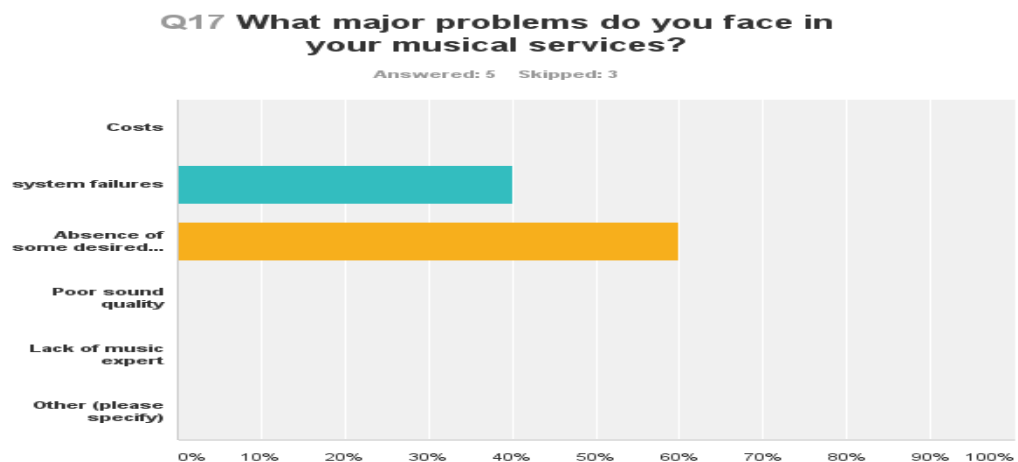


Figure 10 Problems in playing process

Question 18 asks a direct question about the respondents position whether they are likely to use Media Cone. All 6 (100%) respondents are still undecided. Decision to use a product is determined by knowledge and usefulness. The indecision whether to use the product or not is due to the low level of product awareness in the niche market. Aggressive advertising campaign is needed.

Table 13 Decision choice

Q.18 Would you use Media Cone?		
Answer Options	Response Percent	Response Count
Yes	0.0%	0
No	0.0%	0
May be, may be not	100.0%	6
<i>answered question</i>		6
<i>skipped question</i>		2

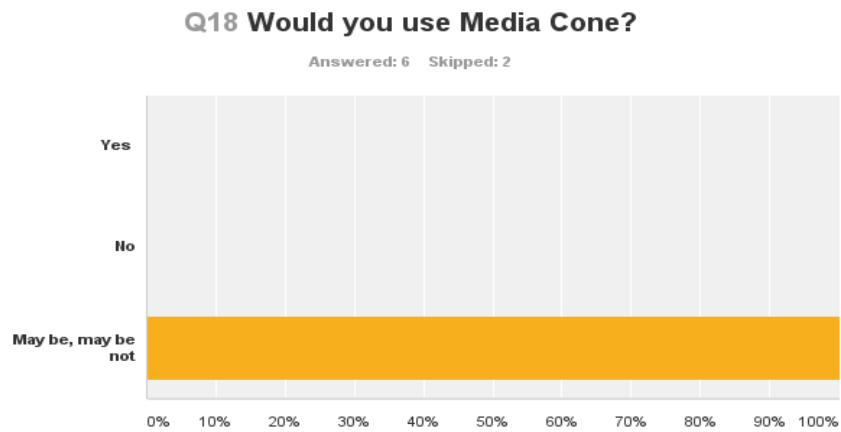


Figure 11 Decision choice

Question 19 is an open question that seeks to find out respondent likes and dislikes about the service. The null response rate is indicative of the low level unawareness of the product as shown in Table 14 below. In order for respondents to express objective views about the use of product, they must see its unique strength over alternative/competitors, competitive in price, adds value and overall makes them better off than before.

Table 14 Likes & Dislikes of the Musical Service platform

Q19		Export
What unique features do you like or dislike about Media Cone?		
Answered: 0 Skipped: 8		
Answer Choices	Responses	
Likes	Responses	0.00% 0
Dislikes	Responses	0.00% 0

Question 20 gives an opportunity for respondents to express their position about the service also sees a null response rate.

Email proposals for potential partnering with digital signage companies saw a 17% (2 companies) response rate of the 12 contacted expressing interest in working with Kutalab Oy. Primedia <http://www.primedia.co.za/> and Advicast MultiMedia <http://www.advicast.co.za/> are willing for more talks and negotiations in working as partners with Kutalab. A follow up and terms of engagement lists, timing are necessary to be clarified and understood by partners until a definite agreement plan is initiated.

5 DISCUSSION

Based on the survey, emails and related industry and literature review the researcher brings out some suggestion and developments to enhance Kotalab's internationalisation decision process.

As the result of the survey reveal, the company has a long rope to pull concerning its marketing and advertising campaign process. Effective and consistence web marketing has a great impact in creating customers awareness in target market. Company's Facebook and LinkedIn profile should constantly be updated with new features and developments. The email marketing campaign has a tremendous role to play considering the type of customer group i.e. hotels, restaurants and businesses. They should carry specialized short pictures and videos about the product. Short video on the webpage and updated YouTube videos puts the product at the centre of the mind. Live chats forum on webpage during working hours is easy to engage the company once a customer is interested in product or services. Advert in SA Music journals, and sponsor of Live Music events' Billboards, stage ground. A continuum measure of feedback and analyses of different ads channels is imperative for new decisions.

The company should consider harmonizing/sharing databases with other Africa giant like Simfy, Kleek considering its systematic intelligence advantage. Simfy's database could entirely be imported to Kotalab's considering its intelligence advantage. Webpages can be shared on eithers to enhance awareness. However, Simfy mostly dominate the individual market segment. This might be a golden spot to take hold and dominate the market through the merging of platform contents.

Kotalab has a need for strong resolve between developing the individual mobile app segment or focus on the hotels and businesses licensed software penetration. Individual music market access downloads and subscriptions of South Africa as a whole is still to be fully exploited. Products today are mostly used or consumed on mobile app systems.

Creation of trusted relationships and right networks will rapidly advance company's name, brand and value proposition in the South Africa market. This is the fundamental objective of the network model of internationalisation. Figure 12 below points out some possible groups to liaise with in the process. This will only to go to create/advance product awareness, information and knowledge sharing and facilitate the entry process

Figure 12 Kutalab's potential networks with SA

Licensing is ideal mode of market entry to the South African hotel and related businesses. The eclectic economic paradigm model ownership advantage of patency, expertise knowledge upholds this assertion. It is cost effective and easy to give support online and phone. A representative partner in South Africa like Premedia or Advicast Multimedia will have very limited functions like negotiating deals, secure and making available hardware and system set-ups.

The researcher sees the results of survey as inappropriate to make a sound decision about entering the South Africa five star segments following the low response rate (8%) and 100% indecision about using the product. The researcher therefore declares the research invalid. Nonetheless the industry analysis gives a positive clue about the strengths and future of the market that can be exploited. Perhaps, the company might have to consider entering with both the individual and businesses segments at the same time following the market trends. Merging platforms could also be a golden spot for market leverage.

All in all, the research met its goal to investigate the market. The decision in entering target market lies with the management of Kutalab Oy

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APPENDICES

Appendix 1. Survey

1. Have you heard of media cone?

Yes

No

2. Where did you first hear of media cone

Internet

Website

First time

Others

3. Do you have a music playing plan or policy in your business?

Yes

No

4. Where do you get your music sound track?

Web radio

Local music shops and stores

Local radios

Online shops eg Amazon, Spotify, Napster

Specialized music software from supplier

Live streaming

Live singers and play

Direct online download and play eg You Tube

Others

5. If musical sound tracks are gotten from or played from specialized software, kindly name

Software provider

Name of software

About how much do you pay for licensing fees? (Eur)

6. On a scale from 1-5 how can you rate the software performance? (Applies to Q5)

7. If you use web radio how much do you spend for broadcasting and related fees (Eur)?

8. If you invite and have live singers, about how much do you spend per month (Eur)?

9. In total about how much do you spend monthly on the acquisition and management of music in your business premises (Eur)?

10. Who manages the selection and collection of your playlists?

Any staff

Permanently hired DJ or music curator

Musical software supplier mostly on phone and online

Hired professionals only on special occasions

Other

11. Who supplies and installs your musical play devices? Eg speakers, play media?

12. Where are your speakers located in your business premises?

Anywhere in the building

Deeply fitted on the walls, ceilings

Others...

13. On a scale of 1-5 if your musical play requires internet connections, how would you rate in terms of reliability and efficiency the quality of your internet services?

14. Do you mind the kind of musical sound playing in your business premises for example at the receptionist, common area, spa, bar, pool and or conference room at any point in time?

Yes

No

Maybe

Sometimes

15. Overall, how significantly is the kind of musical sound playing in these business areas in Q14 at any point in time?

16. Generally speaking, musical sound has a tremendous effect in enhancing brand image, services and or business value proposition; Strongly disagree, disagree, neutral, agree, strongly agree

17. What major problems do you face in your musical services? Cost, system failure, absence of some desired tracks, poor sound quality, lack of music expert, others...

18. Would you use media cone? Yes, No, Maybe, maybe not

19. What unique features do you like, dislike about media cone... likes.. dislikes...

20. In your own point of view what can you say about media cone?

Appendix 2. Letter of proposal for potential partnership

Dear sir/madam:

We would like to take this opportunity to introduce our company. We are Kutalab Oy- a media and digital signage company in Finland. We provide a metadata technological online intelligent music that plays online and offline, possible of advertising medium and digital signage services as integrated services-Media cone or single service package as per demand to Finnish and Scandinavian hotels, restaurants, hospitals, bars, pubs, chain stores and public places. Find more on our websites <http://www.djonline.fi/eng/index.html> <http://pinesker.com/en/>

Your company XX is well known in South Africa for top quality digital signage services. We believe a merging of our metadata technological online intelligent musical platform on same system drastically curb costs, increase available space and leverage the fun and comfort of customers in hotels, restaurants, pubs, bars as they enjoy desired music while client's brand product and services are simultaneously communicated on same displayed screens. An installation of our continuously updating metadata intelligent musical software on your client system is enough to power the musical sound in their business premises with little or no efforts. Our clients' feedback is 100% satisfactory. Since we operate in similar line of business, we believe this new model (a personalized business media - media cone) in the delivering of the multiple services (audiovisual content, possibility of an advertising channel) in a package will enable a share of technological know-how, give us a lead and dominance in the fast growing African and evolving media market. It is in this respect that we would like to extend our interest in forming a partnership with your company.

Should you be interested in this cooperation or have any questions in this regard, please feel free to give me a call or reply to this email. An arrangement for a phone and skype call will equally be a veritable forum for our team to effectively sell our preposition.

Thanks

Appendix 3. List of Contacted Digital signage companies

Digital Signage Companies			
Name of Company	Website	Email	Repson
Public Display Technologies	http://www.pdtsa.co.za	hello@pdtsa.co.za	
One Digital Media	http://www.onedigitalmedia.com	info@onedigitalmedia.com	
InteractiveMedia	http://interactivemedia.co.za	info@interactivemedia.co.za	
Primedia	http://www.primedia.co.za	info@primedialtd.co.za	Yes
Global Access	http://globalaccess.co.za	contact@globalaccess.co.za	
Corex	http://www.corex.co.za	info@corex.co.za	
Advicast Multimedia	http://www.advicast.co.za	info@advicast.co.za	Yes
dmx	http://dmx.co.za	sales@dmx.co.za	
Elite Audio Video Automations	http://elitetechnologies.co.za/	info@elitetechnologies.co.za	
Interactive AV Solutions	http://www.ias-av.co.za/contact	info@ias-av.com	

Appendix 4. Respondent List

Respondent List		
Email	Sent	Responded
acemanager@mweb.co.za	Yes	No
adrian.k@singita.com	Yes	No
africanbreeze09@gmail.com	Yes	Complete
africanpride47@gmail.com	Yes	Complete
belmond.info@belmond.com	Yes	No
beverlyhills.reservations@tsogosun.com	Yes	No
bookings@the-links.co.za	Yes	No
capewestin@gmail.com	Yes	Complete
cascadehotel29@gmail.com	Yes	Complete
crobook@suninternational.com	Yes	No
davinci@legacyhotels.com	Yes	No
e@overthemoongh.co.za	Yes	No
enquiries@babylonstoren.com	Yes	No
enquiries@singita.com	Yes	No
enquiries@tonquani.co.za	Yes	Partial
fairlawns@eclipsepr.co.za	Yes	No
gallomanorlodge@mweb.co.za	Yes	No
generalmanager@bushmanskloof.co.za	Yes	No
gm@plettenberg.co.za	Yes	No
gm@waterfall.tintswalo.com	Opted out	No
guillaume@aaldering.co.za	Yes	No
hotel@fancourt.co.za	Yes	No
info.port.elizabeth@radissonblu.com	Yes	No
info@131.co.za	Yes	No
info@aka.co.za	Yes	No
info@asara.co.za	Yes	No
info@atholpalace.com	Yes	No
info@blueviews.com	Yes	No
info@candlewood.co.za	Yes	No
info@capediemlodge.com	Yes	No
info@capeheritage.co.za	Yes	No
info@castello.co.za	Yes	No
info@castollini.co.za	Yes	No
info@clicohotel.com	Yes	No
info@cloudsestate.co.za	Yes	No
info@coraltreeinn.co.za	Yes	No
info@cricklewood.co.za	Yes	No
info@dekloof.co.za	Yes	No
info@headoverhills.co.za	Yes	No
info@holdenmanz.com	Yes	No
info@hunterhotels.com	Yes	No
info@hydeparkvillas.co.za	Yes	No
info@kanonkophouse.com	Opted out	No
info@kleineweide.co.za	Yes	No
info@knysnaparadisecollection.com	Yes	No

info@kurland.co.za	Yes	No
info@lanzerac.co.za	Yes	No
info@leparadispenhouse.co.za	Yes	No
info@lepetitbijou.co.za	Yes	No
info@lombardy.co.za	Yes	No
info@morrells.co.za	Yes	No
info@newmarkethotels.com	Yes	No
info@ogf1812.co.za	Yes	No
info@seastarcliff.co.za	Yes	No
info@stjames.co.za	Yes	No
info@thegorge.co.za	Yes	No
info@theresidence.co.za	Yes	No
info@tladilodge.co.za	Yes	No
info@villaparadisa.co.za	Yes	No
info@webersburg.co.za	Yes	No
info@wildmushroom.co.za	Yes	No
jacquesmau@capegrace.com	Yes	No
johannesburg.regency@hyatt.com	Yes	No
john@steenbergfarm.com	Yes	No
lairen@granderoche.co.za	Yes	No
lindap@saxon.co.za	Yes	No
lindap@saxoncollection.co.za	Yes	No
manager@falconsview.com	Yes	No
marketing@ellerman.co.za	Yes	No
marketing@fairmont.com	Yes	No
marketing@tswalu.com	Yes	No
maslow@suninternational.com	Yes	No
michael@12apostles.co.za	Yes	No
montbehemian@gmail.com	Yes	No
opikobigh@gmail.com	Yes	No
pecker@mweb.co.za	Yes	No
portswood10@gmail.com	Yes	Complete
proteafi@gmail.com	Yes	Complete
reception@alphen.co.za	Yes	No
reception@menlynhotel.com	Yes	No
res@queenvictoriahotel.co.za	Yes	No
reservation@icsandtontowers.com	Yes	No
reservations@crystal towershotel.com	Yes	No
reservations@lapetite.co.za	Yes	No
reservations@leeu collection.com	Yes	No
reservations@lionroars.com	Yes	No
reservations@majekahouse.co.za	Yes	No
reservations@oneandonlyresorts.com	Yes	No
reservations@oubaaihotels.za	Yes	No
reservations@thanda.co.za	Yes	No
reservations@thecapital.co.za	Yes	No
reservations@themarly.co.za	Yes	No
reservations@theparkwood.com	Yes	No
reservations@thewinstonhotel.co.za	Yes	No
reservations@turbinehotel.co.za	Yes	No

reservations4@collectionmcgrath.com	Yes	No
sales.capetown@tajhotels.com	Yes	No
sales@lawhillluxuryapartments.com	Yes	No
sales@simola.co.za	Yes	No
scenq@suninternational.com	Yes	No
spa@pezulaspa.com	Opted out	No
stay@bhl.co.za	Yes	No
stay@pod.co.za	Yes	No
stay@xanaduvilla.co.za	Yes	No
tbhres@suninternational.com	Yes	No
terri.jabaar@caperoyale.co.za	Yes	No
thearinehermanus@gmail.com	Yes	No
tsogosungroup.communications@tsogosun.com	Yes	No
vsterne@global.co.za	Yes	No
wayne@oysterbox.co.za	Yes	No
welcome@villacoloniae.com	Yes	No