A SUSTAINABLE MARKETING STRATEGY FOR DUTCH TOURISTS TO SOUTH AFRICA

by

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Statements and suggestions made in this dissertation are those of the author and should not be regarded as those of the Potchefstroom University for Christian Higher Education

**I would like to dedicate this dissertation to
my Heavenly Father
who gave me a second chance in life
to complete my study**

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SUMMARY

Keywords: market, tourists, the Netherlands (Dutch), destination marketing, marketing strategy, sustainability, market segmentation

The Netherlands is South Africa's fifth most important market and therefore South Africa has to maintain this market potential. If South Africa can maintain a steady growth rate of between 3-5% it would be a very sustainable growth rate for South Africa's economy. This leads to the main aim of the study, namely to develop a sustainable marketing strategy for Dutch tourists to South Africa. Only 0.64% of a Dutch population of 15 million visited South Africa in 2002 which is an indication that the market still has some growth potential.

This study is important to gain a better understanding of the Dutch tourist market in order to develop an effective marketing strategy. In order to achieve the above-mentioned aim, 400 questionnaires were distributed randomly on different train routes in the Netherlands.

The study indicated that:

- The main finding of the study is that South Africa should follow a Differentiated strategy to target the market segments. A differentiated marketing strategy is when a destination identifies more than one viable target market segment and prepares marketing mixes (product, price, place and promotion) for each segment. This study identified three different market segments for the purpose of maintaining the current market and to exploit a new market.

The market was extended to market segment 1 and 2.

Market segment 1: **Young explorers-** ***Age group 20-24 years (students)***

Market segment 2: **Knowledge seekers-** ***Age group 35-49 years (Non-profit workers)***

For maintaining the current market, segment 3 was identified

Market segment 3:* Ambitious travellers-*Age group 25-34 years (Sales Personnel)

- A sustainable marketing strategy is an ongoing strategy for the future and not one big campaign. It should consist of a series of actions or small marketing efforts that can maintain and extend the market for sustainability.
- For sustainability always monitor the Dutch tourism demand (Dutch tourists' needs) and the supply (how many tourists South Africa can accommodate) on regular bases.

A successful marketing strategy should indicate the direction in which all the marketing efforts are made, for instance to increase arrival figures and maintaining a sustainable growth rate of between 3-5% per year.

OPSOMMING

Sleutelwoorde: mark, toeriste, Nederland, bestemmingsbemarking, bemarkingstrategie, marksegmentering

Nederland is Suid-Afrika se vyfde belangrikste mark en daarom moet Suid-Afrika hierdie mark potensiaal handhaaf. Indien Suid-Afrika 'n bestendige groeikoers tussen 3–5% kan handhaaf, sal dit 'n volhoubare groeikoers vir Suid-Afrika wees. Dit lei tot die hoofdoel van hierdie studie, naamlik om 'n volhoubare bemarkingstrategie te ontwikkel vir Nederlandse toeriste na Suid-Afrika. Slegs 0,64% van 'n Nederlandse bevolking van 15 miljoen het Suid-Afrika in 2002 besoek wat 'n aanduiding is dat die mark nog 'n potensiële groei het.

Die studie is belangrik sodat 'n beter begrip van die Nederlandse toerismemark verkry word sodat 'n effektiewe bemarkingstrategie ontwikkel kan word. Om bogenoemde doelstelling te bereik is 400 vraelyste ewekansig op treine in Nederland uitgedeel.

Die studie het aangetoon dat:

- Die belangrikste bevinding van die studie was dat Suid-Afrika 'n gedifferensieërde strategie moet volg om die marksegment te teiken. 'n Gedifferensieërde bemarkingstrategie is wanneer 'n bestemming meer as een lewensvatbare teikenmarksegment identifiseer en 'n bemarkingsmengsel (produk, prys, plek en promosie) voorberei vir elke segment. Hierdie studie het drie verskillende marksegmente geïdentifiseer vir die doel om die huidige mark te volhou en 'n nuwe mark te ontgin.

Die mark is soos volg uitgebrei na marksegment 1 en 2:

Marksegment 1: Jong ondersoekers – Ouderdomsgroep 20–24 jaar (Studente).

Marksegment 2: Kennissoekers – Ouderdomsgroep 35–49 jaar (Nie- winsgewende werkers)

Om die huidige mark te behou is segment 3 geïdentifiseer:

Marksegment 3: Ambisieuse reisigers – Ouderdomsgroep 25–34 jaar (Verkoopspersoneel).

- 'n Volhoubare bemarkingstrategie is 'n voortgesette strategie vir die toekoms en nie net een groot veldtog nie. Dit behoort uit 'n aantal klein bemarkingspogings of 'n reeks aksies te bestaan wat die mark kan uitbrei en onderhou vir volhoubaarheid.

- Vir volhoubaarheid moet die Nederlandse toerisme aanvraag (Nederlandse toeris se behoeftes) en die aanbod (hoeveel toeriste kan Suid-Afrika huisves) op 'n gereelde basis gemonitor word.

'n Suksesvolle bemarkingstrategie behoort aan te toon in watter rigting al die bemarkingspogings gemaak word, byvoorbeeld om aankoms syfers te verhoog en 'n volhoubare groeikoers van tussen 3 – 5% per jaar te volhou.

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> *All the world's a stage, all the men and women merely players; they have their exits and their entrances, and one man in his time plays many parts*
> ***Shakespeare***

1.1 INTRODUCTION

According to the WTTC (1999), tourism is now the world's largest generator of work opportunities. There was a remarkable increase in international tourist arrivals from 25 million in 1950 to 664 million in 1999, an average annual growth rate of 7 percent (WTO, 2001a). By the year 2020 international arrivals are predicted to reach 1.18 billion, representing an average annual growth rate of 4.1 percent. Long-haul travel is predicted to grow even faster (WTO, 2001b). International tourism will continue to grow and tourism is making a major contribution to the economic viability of many destinations today.

According to SSA (2002) as many as 6.4 million foreign tourists visited South Africa in 2002. The main markets to South Africa in 2002 were firstly, UK (449 088 foreign arrivals), Germany (253 411), USA (187 681), France (114 797), and fifthly the Netherlands with (111 873). The Netherlands is one of South Africa's biggest tourist markets and therefore South Africa has to maintain this market potential. The arrival figures of Dutch tourists to South Africa and the percentage of growth for the last three years was as follows: 2000 (91154 tourists- 6.5% growth), 2001 (97780 tourists- 7% growth) and 2002 (111873 tourists- 14.4% growth). According to the South Africa Department of Finance (1996) the Government's Macro-economic strategy on growth, employment and redistribution (GEAR) indicates that an economic growth rate of substantially higher than 3 percent per annum needs to be sustained if the unemployment rate of more than 30% is to be reduced. If South Africa can maintain a steady growth rate of between 3-5% it would be a very sustainable growth rate for South Africa's economy. According to the arrival figures South Africa is still in the growing stage of the product life-cycle (the product life-cycle can be divided into four phases: introduction stage, growth stage, maturity stage and decline stage see Figure 1.1). In the growth stage only 0.64% of a Dutch population of 15 million visited South Africa which is an indication that the market still has some growth potential (CBS, 2002a).

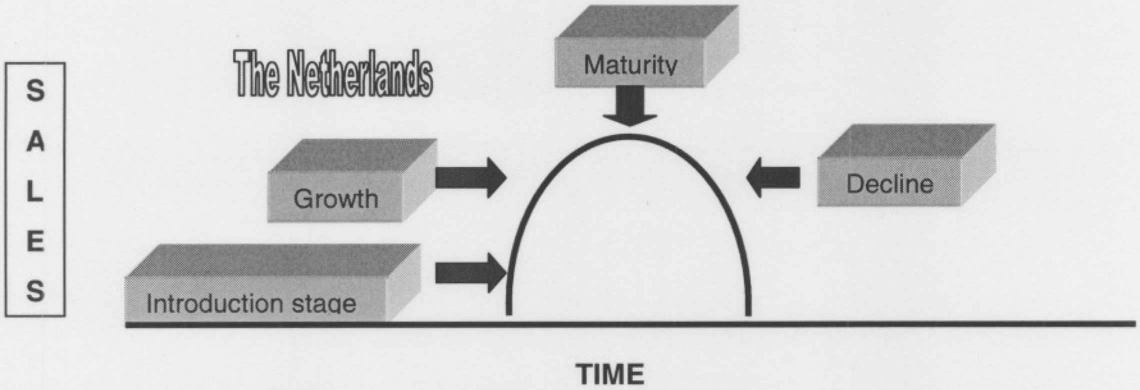

Figure 1.1: Product Life–Cycle (Baker, 2000: 109)

Since 1993, the Netherlands has been a strong producer of tourism to South Africa and as many as 59 tour operators in the Netherlands offer touring packages to South Africa (SAT, 2002b). It is important to know the travelling behaviour of the current Dutch tourist market to be able to develop a new marketing strategy that will apply to the Dutch tourist market.

In the past the South African Tourism Board (Satour), now called South African Tourism, used previous years' arrival figures to select target markets- a process which also led to the establishment of international offices in these markets (Saayman & Saayman, 2001). Other methods that can be used to select target markets are: to determine the expenditure of the market, the economic impact of the expenditure and lastly to do a market analysis in the source market (Saayman, 2001b). According to a communication by van der Tuuk (2002) a market analysis in the source market is the best method because it is very good to have eye contact with the market. This method helps to observe current feelings and perception of the destination. This method is also very costly and most marketing agencies can not afford it or avoid it.

Usage of the available statistics of Dutch tourists in South Africa was limited to arrival figures only. Marketing allocations were made to each of the international offices annually, but no clear marketing priorities in terms of promotional efforts have been set, causing the marketing spend to be allocated on an ad- hoc basis (Saayman & Saayman, 2001). A comparative study by the World Tourism Organisation (WTO) found that this situation was not unique to South Africa. Other destinations also had no clear correlation between marketing spend and tourism arrivals or promotional budget spend and tourism income (Campbell, 1993).

In recent years tourism businesses have been inundated with advice on how to formulate a marketing strategy. It is something everyone knows should be done, yet sadly no one does it, everyone prefers to operate according to circumstances. People read books on the subject, attend strategic conferences and, in some instances, even propound own theories. Yet somehow, a true marketing strategy never sees the light of day. When something does emerge then, all too often, at first setback or sign or retaliation, the strategy is either abandoned or, despite market changes, blindly adhered to (Hodgson, 1987). The aim of this chapter is to give guidelines of the research process that will be followed to develop a sustainable marketing strategy for Dutch tourists to South Africa.

1.2 PROBLEM STATEMENT

Billions of dollars are spent each year on tourism marketing all over the globe. The magnitude of these expenditures necessitates researchers to help guide tourism marketing decisions (Spotts, 1997). Perdue (1996) states that target market selection and the allocation of promotional efforts across alternative markets are key strategic concerns of a destination marketing organisation. South Africa has increased its tourism marketing budget significantly since 1994. Given limited promotional resources, increasing costs and increasing accountability demands, tourism marketers must allocate promotional efforts across alternative markets to achieve two goals: (i) maintaining important existing markets and (ii) penetrating markets with high incremental sales potential.

South Africa needs to improve its tourism marketing strategy by developing a sustainable marketing strategy (Saayman, 2001b). A sustainable marketing strategy can maintain long-term benefits such as an increase in revenue. The reason for a sustainable marketing strategy is because of the following reasons:

- *Changing trends.* Tourists tastes and preferences are continually changing and a destination that offers touring packages should change the packages on a regular basis in correlation with the current trend.
- *Instability of demand.* If there is a low tourist loyalty for a destination, mode of transport or accommodation in the tourism industry. The instability of demand leads to problems in planning and increases business risks.
- *Elasticity of demand.* Elasticity of demand is the result of elasticity of income and price. Income elasticity describes the changes that take place in the quantity as a

result of changes in potential consumer income. Price elasticity describes the results which any change in price has on the quantity demanded.

- *Seasonality of demand.* Tourism is an industry where the demand is subject to seasonality. It may be the result of factors outside the tourist's control (for example school holidays or annual closing periods of businesses).

- *Competition.* When tourists find one destination inadequate, they will choose another and as soon as they are satisfied with their choice, they remain loyal to the destination for a while. A destination has to identify its target market and provide in the tourist's specific needs, then a destination can increase consumer loyalty (Saayman, 2001b).

For a tourism destination to be sustainable, a balance has to be found between tourism demand and tourism supply. Demand can be defined as the volume of particular types of segments of tourists at particular places doing specific activities. Supply can be defined as the type and volume of products which are supplied to the tourist. Sustainability is not always easy to maintain because the demand can easily be bigger than the supply or a big decrease in demand can be the result of increasing costs or different trends can easily cause unstable sustainability (Middleton & Hawkins, 1998). Harris *et al.* (2002) indicate that economic sustainability can be reached in two ways: firstly, by satisfying customer demand, and secondly, by creating local employment.

Market segmentation plays a key role in the marketing strategy. It can be seen as one of the key success factors of tourism marketing, of almost all successful destinations and is a powerful marketing tool for several reasons (Buhalis, 2000). Market segmentation is one of the keys to developing a sustainable competitive advantage based on differentiation, low cost, or a focused strategy (Aaker, 1998). The purpose of market segmentation is to identify homogeneous groups of people with similar characteristics from among the heterogenous population of tourists. Effective market segmentation can lead to an increase in tourist numbers and better use and management of scarce resources (Middleton, 2001).

Similar studies regarding market segmentation were done by other researchers and are indicated in Table 1.1. There are more studies but only a few are indicated.

Table 1.1: Similar studies

Researcher	Year	Topic
Saayman & Uys	2003	Profiling spectators at a one-day international cricket match
Saayman	2002	A marketing analysis of tourists visiting selected National Parks in South Africa
Saayman	2001a	A marketing analysis of visitors to Pretoria National Zoo
George & Abdulaziz	2001	A clustering method for categorical data in tourism market segmentation research
Asgary & Walle	2001	International boundaries and tourism strategies
Woodside	2000	Measuring advertising effectiveness in destination marketing strategies
Vogt *et al.*	1998	Communication strategies to reach first-time visitors
Waitt	1996	Marketing Korea as an international tourism destination
Spotts & Mahoney	1991	Segmenting visitors to a destination region

By doing market segmentation the destination identifies market segments, selects one or more, and develops products and marketing mixes tailored to each selected segment (McDonald & Dunbar, 1995). The marketing mix has been described as product, distribution, promotion and pricing strategies intended to bring about mutually satisfying exchange relationships with target markets (Lamb *et al.*, 2002; Russell & Lane, 1999), providing or developing a product or a service and its associated marketing programme to fit a place in the tourist's mind (Green *et al.*, 1988). After the marketing mix is in place a marketing strategy should be developed.

Leibold (1992) recommends that the following goals should be pursued by the tourism industry in order to develop a marketing strategy:

- To select and target particular market segments
- To identify competitors and shares of the relevant markets
- To develop appropriate tourist products and infrastructure

- To apply scarce marketing resources efficiently.

A marketing strategy is primarily responsible for future sales revenue generation by specifying the segments, products and associated action programmes required to achieve sales and market share against competitors and to deliver customer satisfaction (Middleton, 2001; Piercy, 1992).

South African Tourism needs to strategise and repackage products and be more innovative and creative in terms of promotional efforts to continue attracting tourists from these primary markets, which provide high economic returns (Saayman & Saayman, 2001). Therefore, South Africa's marketing strategies must strive to improve continuously upon the currently successful solution to the markets' needs.

The question remains:

What would a sustainable marketing strategy for Dutch tourists to South Africa entail?

1.3 AIM AND OBJECTIVES OF THE STUDY

The following aim and objectives guided the study:

1.3.1 Main aim

To develop a sustainable marketing strategy for Dutch tourists to South Africa.

1.3.2 Objectives of study

- Objective 1

  To analyse the literature on different marketing strategies and sustainability.

- Objective 2

  To analyse the Dutch tourist market by (mostly) making use of data and statistics that are available in the Netherlands.

- Objective 3

  To do a survey in order to determine what South Africa must do to maintain growth of the tourism potential of the Dutch market.

- Objective 4:

  To make recommendations to South African Tourism for a new sustainable marketing strategy.

1.4 RESEARCH METHODOLOGY

The research followed a two-pronged approach, namely a literature study of the most recent and relevant publications and a survey by means of a questionnaire.

1.4.1 Analysis of Literature

The literature study was based on a qualitative literature study, which includes theses, dissertations, articles, the Internet, sources on market segmentation, an analyses of the Netherlands and other related tourism literature. Themes included: sustainability, market segmentation and marketing strategies.

The literature study also includes the following database; General library database, Internet, RSAT (SA Magazines), the Netherlands database CBS (Centraal Bureau voor de Statistiek), SAT (South African Tourism) and WTO (World Tourism Organisations) research.

1.4.2 Empirical research

Based on the qualitative content analysis a questionnaire was compiled. The survey was conducted in the Netherlands during 11-30 March 2003. 400 questionnaires were distributed randomly on different train routes in the Netherlands of which 81% (N=325) of the questionnaires were useful. The sample population was 400 because of a limitation of the budget amount and references on research methodology indicated this to be a representative sample size (Steyn *et al.*, 1994). The biggest regions that were represented were Friesland (29%), Noord Brabant (18%) and Gelderland (10%). The questionnaire was in Dutch for the reason that not every Dutch citizen understands English very well, especially the elderly.

The questionnaire was designed to derive the general socio-demographic profile and a consumer profile of the Dutch citizens by making use of a 4 point Likert scale, open questions and multiple-choice questions with multiple answers. To determine the socio-demographic profile, the questionnaire included questions on gender, age, marital status, home town, occupation, annual income and the number of children dependent on them. To determine the consumer profile the questions included which newspapers and magazines they read, favourite radio stations and television programmes, usage of e-mail, influences to visit a specific destination, how big is the travelling group when travelling internationally, average length of stay, what are their top 5 tourism destinations. Those who had been to South Africa had to answer one section and those who had not been to South Africa another section. The reasons why the respondents did not visit South Africa are an important element to be able to know what South Africa can do to attract more Dutch tourists to the destination. The statistical Services at the Potchefstroom University processed the information. Descriptive statistics were used to gain insight into the research.

1.5 TERMINOLOGY

The following concepts are used regularly throughout the dissertation and therefore need clarification:

1.5.1 Market

The word market has acquired various meanings over the years. To a marketing strategist a market is the set of all actual and potential buyers of a product. Exactly how that market is defined is of crucial importance for the understanding of human behaviour (Holloway & Robinson, 1995). According to Evans and Berman (1992) a market consists of all possible tourists that use or will use a product or service. It can be subdivided through market segmentation. A market can also be defined as a group of people who can be identified by some common characteristic, interest, or problem; could use the product to their advantage, can afford to buy it, can be reached through some marketing medium (Russell & Lane, 1999). Youell (1996) defines a market as the total number of persons who buy (an existing market), or may buy (potential market) a product/offering or service. In conclusion and for the purpose of this study a market can be seen as a group of potential tourists with similar needs who are willing to exchange something of value with marketing strategists offering goods and/ or services-ways of satisfying those needs (Perreault & McCarthy, 1999).

1.5.2 Tourist(s)

Tourists are potential markets who purchase a number of diverse travel and tourism services. If destinations have a clearer understanding of why their products are in demand, it will not only be able to tailor the products more closely to the needs of their tourists, but also be able to select the advertising and sales messages used to inform and persuade those tourists to buy the products (Holloway & Robinson, 1995). According to Saayman (2000) a tourist is a person who voluntarily visits a place, away from his normal abode, contributes an economic input, for a period of at least 24 hours.

1.5.3 The Netherlands (Holland)

For the purpose of the study the Netherlands will be referred to as Dutch people/citizens. The Netherlands is situated on the western part of the European continent and shares borders to the south with Belgium and to the east with Germany, while the North Sea lies to the north and west. The official name of the destination is the Kingdom of the Netherlands but Holland is the name commonly given to the destination, although it really applies to only two of the constituent provinces, albeit the most important historically. The destination covers an area of 41526 square kilometres and the official language is Dutch. The Netherlands is divided into 12 regions namely Drenthe, Flevoland, Friesland, Gelderland, Groningen, Limburg, Noord Brabant, Overijssel, Utrecht, Zeeland, Noord-Holland and Zuid-Holland of which Zuid-Holland is the biggest. Noord-Holland and Zuid-Holland are also referred to as the Randstad area (cf. 1.2). The capital and biggest city of the Netherlands is Amsterdam in the Noord-Holland region (731200 citizens) followed by Rotterdam the second biggest (593321 citizens) and The Hague (440900 citizens, Anon, 2001). The Netherlands was once a major colonial power and overseas trade remains vital to the economy (Boniface & Cooper, 1987: 80).

Figure 1.2: Map of the Netherlands

1.5.4 Destination marketing

Destination marketing is increasingly becoming competitive world-wide. Destination marketing facilitates the achievements of tourism policy which should be co-ordinated with the regional development strategic plan. Marketing of destinations should also guide the tourism impacts optimisation and maximisation of benefits for the region. Destinations are considered to be a defined geographical region, which is understood by its visitors as a unique entity, with a political and legislative framework for tourism marketing and planning. It is a combination of all products, services, and ultimately experiences provided locally (Buhalis, 2000).

Tourists perceive the destination as a brand comprising of a collection of suppliers and services. Before visiting, tourists develop an image about destinations as well as a set of expectations based on previous experience, word of mouth, press reports, advertising and common beliefs. During their holiday, tourists "consume" destinations as a comprehensive experience, without often realising that each element of the product is produced and managed by individual players (George, 2002).

1.5.5 Marketing strategy

A marketing strategy identifies and is primarily responsible for future sales revenue generation by specifying the segments, products and associated action programmes required to achieve sales and market share against competitors- and deliver customer satisfaction (Middleton, 2001; Piercy, 1992). The marketing strategy needs to start with a broad look at the market-paying attention to tourist needs, the destination's objectives and resources as well as the competitors (Semenik, 2002). A good look at the market is done by doing market segmentation (See 2.4.2). Market segmentation assists to pinpoint the target market in order to better understand their needs. It is crucial in assisting in determining the right marketing mix for the right target market (Perreault & McCarthy, 1999).

For the purpose of this study a marketing strategy can be seen as a strategy that analysed the current situation, defined the target market and developed a marketing mix. For the case of this study a sustainable marketing strategy should be developed (See 1.5.6).

1.5.6 Sustainability

Sustainability is a concept that can be used to describe various situations and it must be understood in the context that it is used. The World Tourism Organisation (WTO, 1995) described it as follows: "Sustainable tourism development meets the needs of present tourists and host regions while protecting and enhancing opportunities for the future. It is envisaged as leading to management of all resources in such a way that economic, social, and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity, and life support systems".

In the context of the study sustainability is used to describe the marketing strategy. For maintaining a good future sales revenue for South Africa there should be a sustainable growth rate and this sustainable growth rate can be reached by implementing a sustainable marketing strategy.

To implement a marketing strategy, a destination should first have a sustainable marketing perspective (a marketing perspective provides the optimum management process for achieving sustainability at tourism destinations). A sustainable marketing perspective is achievable through the application of the following:

- The segments must be identified and measured in terms of key variables which define them and their patterns of behaviour. For example behaviour reflects tourists' ages, socio-economic status, psychographic make-up, length of stay, seasonality.

These are matters to be tackled by visitor management techniques at any given destination. Such techniques include product development which respond to the behaviour patterns of the particular groups of segments of people who visit specific destinations for particular purposes at specific times (Middleton & Hawkins, 1998).

A sustainable marketing strategy is a strategy where a steady growth rate is maintained, a market segment is identified, a marketing mix is developed for the specific segment and a balance between the demand and the supply of the tourism destination is sustained.

1.5.7 Market segmentation

To ensure continuity and growth, a destination is dependent on; *inter alia*, tourists and the satisfaction of their needs. Although total satisfaction of tourists' needs is not the goal in itself, striving to achieve this enables the business to attain its own goals (Strydom *et al.*, 2000). To achieve maximum tourist satisfaction, marketing strategists therefore divide the heterogenous market into fairly homogeneous subsets of tourists, a process that is referred to as market segmentation. It is a strategy by which a destination partitions a market into sub-markets or segments likely to manifest similar responses to marketing inputs. The aim is to identify the markets on which a destination can concentrate its resources and efforts so that maximum penetration of that market can be achieved, rather than aiming for perhaps a market spreading strategy where the aim is to achieve a presence, however small, in as many markets as possible (Doole & Lowe, 2001). For the purpose of the study the market segment should first be identified before a marketing strategy can be developed.

1.6 CHAPTER CLASSIFICATION

The study consists of five chapters. Chapter one includes the problem statement, aims, method of research and definition of terms. Chapter two reports on tourism marketing strategies as well as sustainability. Chapter three analyses the Netherlands as a primary tourism market to South Africa. The research methodology, the questionnaire and the analysis and interpretation of the data are addressed in Chapter four. Conclusions and recommendations are made in Chapter five.

2 TOURISM MARKETING STRATEGIES

> *Marketing should focus on market creation not market sharing*
> ***Regis McKenna***

2.1 INTRODUCTION

Destination marketing has become increasingly competitive over the last decade (Buhalis, 2000). The attractiveness of a travel destination reflects the feelings, beliefs, and opinions that an individual has about a destination's perceived ability to provide satisfaction in relation to his or her special vacation needs (Hu & Richie, 1993). Foreign tourism to South Africa has an average increase of 10% per annum since 1988 (Saayman, 2000), making South Africa one of the fastest growing tourism destinations world-wide (van der Merwe, 2000).

South Africa is a new role player in the global tourism market and it is essential for the destination to work towards definite long-term goals and strategies to position South Africa as a tourist destination and attract even more visitors (SAT, 2002a). Long-term strategies involving overseas market research and the production of an international advertising campaign designed for specific geographic markets are essential if the news media images of violence and crime are to be countered or replaced by a variety of unique South African experiences demanded by inbound tourists (Buhalis, 2000; Faulkner, 1998; Waitt, 1996). One of the best ways to secure long-term growth in international tourist arrivals is to understand each tourist market as an individual group of tourists and their distinct cultural make-up. The cultural make-up provides a basis for the development and application of marketing strategies, which can effectively target the specific tourist markets (Reisinger & Turner, 1998).

In order to become one of the top 10 destinations, South Africa needs to revise it's marketing strategy. The strategy needs to start with a broad look at the market: paying attention to tourist needs, the destination's objectives and resources as well as the competitors. The value of a comprehensive market segmentation effort is that it enhances performances across all phases of the marketing and promotional campaign (Semenik, 2002). Segmentation assists to pinpoint the target market in order to better understand their needs. It is crucial in assisting in determining the right marketing mix for the right market (Perreault

& McCarthy, 1999). Market segmentation enhances a destination's efforts related to precise specification of marketing objectives and a better understanding of the needs, desires, and motives of tourists. Through the process of segmentation the destination has the ability to identify more precisely the messages to use across promotional mix tools (Semenik, 2002).

Market segmentation plays a key role in the marketing strategy. It can be seen as one of the key success factors of tourism marketing, of almost all successful destinations and is a powerful marketing tool for several reasons. Most importantly, nearly all markets include groups of people or destinations with different product needs and preferences (Buhalis, 2000). Destination marketers can more accurately define marketing objectives and better allocate resources. In turn, performance can be better evaluated when objectives are more precise (Dibb & Simkin, 2001). The objectives of destination marketing activities are often more complicated than those of private organisations because it is usually carried out by the public-sèctor. There are six objectives of destination marketing (cf.1.5.4) namely: information provision, portraying an image of the destination, amenity provision for locals, increased pride, improved international ties, and promotion of attractions (George, 2002).

Marketing strategies are not about some underlying logic based on well-crafted arguments and elegant analytical models; they are, in essence, a series of coherent decisions that can be implemented in the future. Marketing strategies should be proactive, whether the decision is to grasp some major new activity or to consolidate a current position. Relationships do not just happen in a market where all customers have an abundance of choices, and to achieve ongoing profitable business requires creativity, investment and effort (Adcock, 2000:301).

This aim of the Chapter is to indicate what tourism marketing entails, what marketing strategies are, the process in developing a marketing strategy as suggested by different researchers and at the end of the chapter the important aspects in formulating a marketing strategy will be given.

2.2 TOURISM MARKETING

Dubrey (1990) summarises marketing as follows: "It comprises the presentation of that which the consumer wants". However, this describes a static process, whereas marketing is actually a dynamic process. The process consists of three phases, see Figure 2.1.

1) find out what consumers want,

2) create it, and

3) sell it.

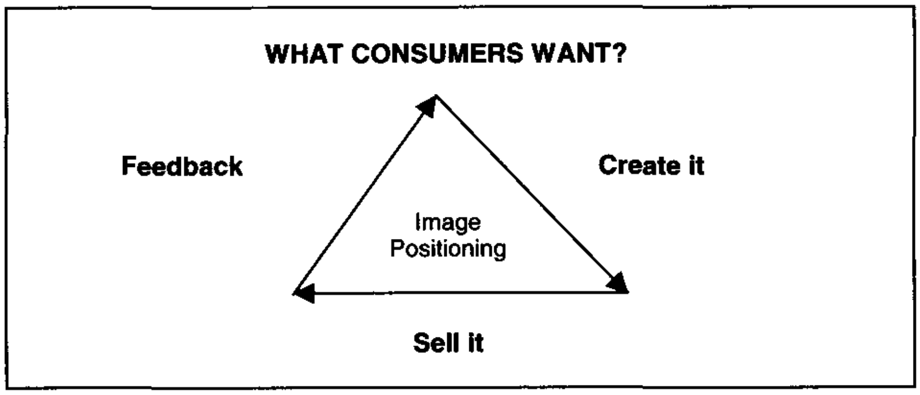

Figure 2.1: Phases of marketing

The aim of marketing is to use people, money and material as effectively and efficiently as possible to maximise profit and growth over a long period of time (Saayman, 2001b).

South Africa is a tourist destination and marketing must be done for South Africa to emphasise its attributes as tourist destination. According to Lundberg (1990:141) destination marketing is the overall effort to identify what a destination has to offer (the product), what groups of people would have, the time, money and desire both to travel and to enjoy the destination (the target markets), and how to reach and convince those people to come to the destination (marketing). Destination marketing involves market research and sales and includes trying to find out how to convince travellers to stay longer and spend more.

According to (Foster 1989:200; Doole & Lowe, 2001:28) the following key points must be taken into consideration when deciding to do marketing:

- Marketing is a philosophy that believes that a business and its decisions should be governed by its markets or customers and their needs rather than by its own desires. Its resources should be tailored to match market demand as closely as possible.
- It is an orderly, systematic process of business planning, execution and control.
- It requires an improved form of commercial organisation.

- It employs improved methods and systems based on scientific laws drawn from economics, statistics, finance and the behavioural sciences.
- It involves a system of commercial intelligence (information and statistics) relevant to its markets or customers, competitors and its own industry.
- It places strong emphasis on innovation.
- It is a method of achieving dynamic business strategy.
- It is a form of management by objectives.
- The marketing effort must have a clear international focus ahead.
- An effective relationship strategy should be in place (between the destination and tourists).
- The marketing organisation/ destination should be well-managed with a culture of learning.

Marketing thus includes the carrying out of business activities or functions that make the transfer of goods and services from the producer (South Africa) to the end consumer (Dutch tourist) possible.

Once the segment has been identified, a marketing mix can be developed for every segment. The marketing mix consists of four aspects that are dependent on each other and continually influence each other, namely product, price, place and promotion (Saayman, 2001b).

2.3 MARKETING STRATEGIES

Different researchers such as (Assael, 1993; Saayman, 2001b; Foster, 1985; Mill & Morrison, 1985; Du Plessis *et al.*, 2001; Walker *et al.*, 1992 and Doole & Lowe, 2001) suggest different marketing strategies. For the purpose of this study the process of formulating marketing strategies will be discussed and at the end of the chapter the elements of a marketing strategy will be given.

A marketing strategy specifies the long-term goals and objectives of a destination by identifying opportunities and the scope of activities needed to realise them. **It is a broad statement of the aims to be achieved over the broad front of the business for the**

longest possible period of time. Marketing policies and plans will depend on what strategy has been agreed upon. Policies, therefore, are shorter-term action programmes concerned with the detailed application of effort and the control of the operations. If the result operations are to be successful, strategy and policy must integrate all the activities of research, product and market management, pricing, the communications mix and distribution. While policies should be altered to match changes in the economic, market and competitive situations, strategy is normally changed only when some major change has taken place in the business environment (Foster, 1985:213).

A marketing strategy is the marketing logic whereby a destination hopes to achieve its marketing objectives. It consists of specific strategies for target markets, positioning, the marketing mix, and marketing expenditure levels. Marketing strategies must be geared to the needs of consumers and also to the strategies of competitors. Designing competitive marketing strategies begins with thorough competitor analysis. The destination constantly compares the value and customer satisfaction delivered by its products, prices, channels, and promotion with those of its close competitors. In this way it can discern areas of potential advantage and disadvantage (Kotler & Armstrong 2001: 66). According to Piercy (1992) a marketing strategy is the overall direction of a business in its various marketplaces.

According to Jain (1997:21) a marketing strategy deals essentially with the interplay of three forces known as the strategic three Cs: the **customer**, the **competition**, and the **corporation.** Marketing strategies focus on ways in which the corporation can differentiate itself effectively from its competitors, capitalising on its distinctive strengths to deliver better value to its customers. A good marketing strategy should be characterised by (a) a clear market definition; (b) a good match between corporate strengths and needs of the market; and (c) superior performance, relative to the combination, in the key success factors of the business.

In conclusion a marketing strategy can be seen as a strategy to satisfy the target market needs by offering a specific marketing mix and to position the market above other competitors. Based on the interplay of the strategic three C's, formation of marketing strategy requires the following three decisions:

- *Where to compete:* that is, it requires a definition of the market (for example, competing across an entire market or in one or more segments).
- *How to compete:* that is, it requires a means for competing (for example, introducing a new product to meet a customer need or establishing a new image for an existing product).

- *When to compete:* that is, it requires timing of market entry (for example, being first in the market or waiting until primary demand is established, (Jain, 1997:22).

Tourism boards have to follow a strategy aimed at improving their destination's image as a tourist centre. Their objectives include increasing the number of arrivals and the expenditure of tourists, as well as increasing the length of stay at different destinations. Or they may have to persuade tourists to stay in congested resorts or towns for only a few days and then move on to less congested zones for the rest of their holiday. Whichever strategies are planned, their cost must be estimated and weighed against the resources available and the degree of risk involved (Foster, 1985:215).

Laws (1991) suggested the following marketing strategy objectives for a destination:

- To support the marketing of destinations with a proven record of success and to encourage ventures with clear and demonstrable potential for success.
- To concentrate resources on markets which will offer the greatest potential return.
- To help the industry make better use of its actual and potential assets.
- To encourage more effective use of existing tourism capacity by matching with demand.
- Identify marketing to engender a positive attitude to holidays through more creative marketing.
- To improve the quality of presentation of holiday ingredients to the customer.
- To ensure that reliable information about tourism products and opportunities is readily and attractively presented to the consumer.
- To achieve a better use of resources within the industry.
- To provide a national framework for quality control of accommodation, attractions and other tourism products, in order to foster consumer reassurance and to encourage investment and upgrading by the industry.
- To encourage and foster higher standards in all aspects of marketing and consumer relations.

- To develop appropriate products in conjunction with the regional boards and to maintain and enhance the destinations' appeal in overseas markets.
- To increase the understanding among opinion formers and the general public of tourism's wider benefits to social and economic fabric.

South African Tourism (SAT, 2002b), however, wants to achieve the following four objectives:

- **Focused** in a way which ensures that scarce resources obtain the highest possible yield against the objectives of growth in volume, spend, length of stay, distribution and lower seasonality as the key tourism drivers of economic growth, job creation and transformation
- **Customer-driven** to ensure that South Africa understands what the customers need (within the constraints of our own principles and values) and deliver the experience.
- **Strategic** in their approach so as to ensure that they deal with the major issues and challenges for growth, and do not become side-tracked by a myriad of smaller issues that detract from our core mandate.
- **Leaders** in the industry to ensure that the strategy is implemented, and that the benefits of growth accrue to our customers and the widest possible layers of South Africans.

In order to achieve the above-mentioned objectives the following process suggested in Figure 2.2 needs to be followed.

2.4 PROCESS OF MARKETING STRATEGY

The process of developing a marketing strategy is one of the keys to successful destination marketing. The marketing strategy process consists of 7 steps. The steps involved in the process can be seen in Figure 2.2.

Figure 2.2 Marketing strategy process

(Assael, 1993; Saayman, 2001b; Foster, 1985; Mill & Morrison, 1985; Du Plessis *et al.*, 2001; Walker *et al.*, 1992; Doole & Lowe, 2001)

2.4.1 Step 1: Strategic Analysis

a) SWOT analysis

The SWOT analysis includes the identification of strengths and weaknesses in the business, the opportunities presented by the trading environment and any threats faced by the company. This information provides the basis for further action (Holloway & Plant, 1988: 27-28; Holloway & Robinson 1995:18-19; Kotler, 2000:76-77).

Strengths are the resources or abilities that give a tourism destination the upper hand over competitors. *Weaknesses* must also be acknowledged. Destinations review the destinations' marketing, financial and organisational competencies. Each factor is rated as to whether it is a major strength, minor strength, neutral factor, major weakness, or minor weakness. *Opportunities* are the potentially favourable conditions in the destination environment. A marketing opportunity is an area of need in which a destination can perform profitably. Opportunities can be listed and classified according to their attractiveness and the success probability. *Threats* is a challenge posed by unfavourable trends or developments that would lead, in the absence of defensive marketing action, to sales or profit deterioration. Threats can be classified according to their seriousness and probability of occurrence (Bennett, 2000:147; Kotler *et al.,* 1998:96-97).

Table 2.1 indicates some of the typical issues that managers need to consider when conducting a SWOT analysis.

Table 2.1: The SWOT analysis checklist

STRENGTHS	**WEAKNESSES**
Competitive advantages	Obsolete facilities
Ability to innovate	Lack of management depth
Distribution system	Low brand name identity
Marketing skills	Weak marketing image
Brand name recognition	Low research and development capability
Cost advantages	Below-average marketing skills
Financial strength	Lack of financial muscle
Complete product line	High operating costs
Reputation/ image	Shaky reputation/ image
OPPORTUNITIES	**THREATS**
Expand product line	New competitors
Enter new markets	Slowing market growth
Diversity to broaden risk	Changing needs of customer
Improve buyer/supplier relationships	Adverse demographic changes
Improve technology	Weakening economy
Improve regulatory/ legal climate	Unfavourable regulatory environment
Favourable demographic changes	

(Bennett, 2000:147)

b) Analysing the industry and market

Industry analysis

A destination needs to analyse the present structure and dynamics of the industry in which it competes (or in which it wants to compete), and also its attractiveness for future investment. Industry analysis is important because it can help determine two important elements:

- The attractiveness of markets
- The dynamics of the market, which helps to determine an organisation's future course in the market (Du Plessis *et al.,* 2001:44).

Market analysis

An important aim of a market analysis is to establish whether a market is an attractive proposition to current and potential participants. The attractiveness of a market is generally measured by the long-term return on investment which has been achieved by its participants. A second aim of a market analysis is to grasp a full understanding of the dynamics of the market. A market analysis often includes the following seven dimensions:

- actual and potential market size
- market growth
- market profitability
- cost structures
- distribution systems
- trends and developments
- key success factors (Du Plessis *et al.,* 2001:48).

c) Product and competitor analysis

The overall objective of the product and competitor analysis is to determine where the product presently stands compared in the eyes of the market. Competition is defined as any firm or destination seeking to serve the same market as ourselves. This objective is accomplished by analysing product and competition. The product and competitor analysis consists of a comparative evaluation of the following factors:

- *Natural tourist resources*

  such as climate and topography.

- *Cultural and historical resources*

  such as historical monuments, museums, traditional events, ways of life.

- *Infrastructure*

  such as fresh water supply, road network, and communications.

- *Means of access and internal transportation facilities*

  such as airports, railroads, and bus companies.

- *Attractions and facilities*

  such as sporting events, hotels, and restaurants (Mill & Morrison, 1985:367).

A comparison between a product and its major competitors is a determination of comparative strengths and weaknesses. What do the destination have that is better than the competition?

2.4.2 Step 2: Define the target market

According to Saayman (2001) it is no longer possible to serve a total market and it is therefore necessary to segment markets and concentrate on a single segment or a number of segments. Market segmentation identifies bases for segmenting the market but also develops profiles of resulting segments (Kotler, 1994:219). According to Bennett (2000:199) and Kotler *et al.* (1998:266-267) a market segmentation strategy recognises the fact that few tourism products and organisations are universally desired. An effective strategy would be to determine target markets and to reach only those markets by means of the marketing offering. In contrast to a shotgun approach which aims at the total market, segmentation uses a rifle approach to zero in on the specific market(s) that interest the organisation. The process involves three steps:

2.4.2.1 Bases for segmenting the market

There is no single way to segment a market. A marketer has to try different segmentation variables, alone and in combination, hoping to find the best way to view the market structure.

a) **Socio-economic segmentation.**

Discount prices and advertisements are often used in socio-economic segmentation. The variables (age/gender) can easily be measured and usually coincide with consumer tastes. They are also easily identified, easy to understand and applicable to making a specific marketing decision (Saayman, 2001b).

b) **Demographic segmentation**

Demographic segmentation consists of dividing the market into groups based on demographic bases such as age, gender, family life cycle, income, occupation, education, religion, race and nationality. Demographic factors are the most popular base for segmenting tourist groups. One reason is that consumer needs, wants, and usage rates often vary closely with demographic bases. Another is that demographic bases are easier to measure than most other types of bases (Kotler *et al.*, 1998; Proctor, 1996; Holloway & Robinson, 1995). A benefit of demographic segmentation is that sizes based around demographics are normally large because they parcel the total population into a limited number of groups. Age provides the biggest range of options for defining a large number of groups, but realistically few destinations work with more than three or four categories of age. Some of the smallest groupings obtained by demographic classifications come from the family life cycle (Burke & Resnick, 2000).

The *family life cycle (FLC)* is intended to show the various stages through which households progress. The implication for providers of products and services is that linked to the different stages in the FLC there are different purchasing needs. The idea behind it is that consumption changes as people progress through different phases of the cycle and that tourists' tastes and choices will change too. Tourism can sometimes be a ritual purchase to celebrate a rite of passage as people pass from one phase of the life cycle to another (Pender, 1999).

The family life cycle is a demographic base that combines the effects of age, marital status, career status and the presence of children. This can then be used together with other bases to reflect reality (Wilson *et al.*, 1993; Lamb *et al.*, 2002) See Table 2.2.

Table 2.2: Stages in the family life cycle and associated buying preferences

STAGE IN FAMILY LIFE CYCLE	BUYING INTERESTS
1. Bachelor stage – young singles living at home	Few financial commitments. Fashion clothes, sport and leisure products, cars, music centres and records, holidays
2. Newly married or coupled persons without children	Better off financially than they are likely to be in the near future. High purchase rate of consumer desirables. Cars, consumer durables, holidays, furniture
3. Full nest 1 – couples with youngest child under 5	House buying is at a peak. Liquid assets are low. Dissatisfied with level of savings and financial position generally. Washing machines, driers, baby items, economy food
4. Full nest 2 – couples with youngest child 6 – 11	Financial position is improving. A higher proportion of wives are working. Children's toys, education products, domestic appliances, many foods
5. Full nest – older couples with dependent children 11 – 18	Financial position is improving yet further. Consumer durables, better furniture, hobby items
6. Empty nest 1 – older couples, no children at home, head of family still working	Home ownership is at a peak. The financial situation has improved and savings have increased. Travel, recreation, self-education, investments, luxuries
7. Empty nest 2 – older couples, no children at home, head of family retired	Substantial reduction in income. Cheaper holidays, value for money goods
8. Solitary survivors in labour force	Income still high but may sell home. Economy living
9. Solitary survivor retired	Medical needs. Substantial cut in income. Need for attention and security.
10. Single parents with children – includes both unmarried single parents as well as divorcees	
11. Same sex couples in gay relationships	

(Proctor, 1996; Pender, 1999; Wilson *et al.*, 1993; Horner & Swarbrooke, 1996)

Social class is the single most used base for research purposes. Most destinations will segment the market by combining two or more demographic bases (Kotler & Armstrong, 2001). Tourist attractions are visited by different kinds of tourists, but two demographic bases – gender and age – coupled with geographic region can be useful in distinguishing users of one attraction from those of another. Marketing strategists will thus make use of multibase demographic segmentation.

One of the demographic categories includes gender. While this base has obvious applications for such products as clothes, cosmetics and magazines, ever-greater attention has been paid in recent years to the ways in which it can be used as a key element in the strategies to market a far wider range of products. In part, this has been brought about by a series of fundamental changes that are taking place within society, including a greater number of working women, and the generally higher levels of female independence. One result of this has been an increase in the number of marketing campaigns targeted specifically at women, for example health spas (Wilson *et al.*, 1993; Kotler *et al.*, 1998).

Other important categories of demographic bases focus on *income and occupation.* The combination of the above resulted in the JICNARS (Joint industry committee for national readership surveys) approach (Table 2.3) to social classification. This classification proved to be popular, enduring and easily understood. It is, however, an imprecise method of segmenting a market since social class today is a far less accurate predictor of income and spending patterns than was once the case. It has also been argued that social class is unable to give any real insight into a household's level of disposable income, particularly where there are several wage earners (Horner & Swarbrooke, 1996).

Table 2.3: JICNARS Classification of social class

GRADE	
A	Upper middle class: higher managerial administrative or professional
B	Middle class: middle to senior management, up and coming professionals
C1	Lower middle class: junior management, supervisory, secretarial, and clerical grades
C2	Skilled working class: manual trades
D	Working class: semi and unskilled workers
E	Pensioners and widows and those on the breadline, using social security and state benefits

(Horner & Swarbrooke, 1996; Russell & Lane, 1999)

c) Product-related segmentation

Product-related segmentation is a segmentation variable that indicates specific characteristics of the specific product/destination or people. For example recreation activity, equipment type, volume usage, brand loyalty, benefit expectations, length of stay, transportation mode, experience preferences and participation patterns. The different product-related segmentation variables can differ from other destinations. Bennett (2000:201) is the only researcher who adds this variable while other researchers indicate some of these elements in the behavioural segmentation.

d) Psychographic segmentation

Psychographic segmentation entails dividing buyers into different groups based on their social class, life style and/or personality characteristics. Life style and personality segmentation are growing in popularity. The method involves attempting to endow a product with characteristics that correspond to the target group of tourists' self-perceptions. It is maintained that these factors reflect people's values and opinions and thus enable researchers to ascertain why tourists prefer certain products and services to others (Proctor, 1996). By establishing groupings, one will achieve a better understanding of why people buy as they do, and thus be better prepared to respond to tourists' needs and buying patterns (Nickels & Wood, 1997).

While there is some disagreement as to whether personality is useful as a basis for segmentation, life style factors have been used effectively. Many consider lifestyles the most effective criterion for segmentation. These life styles are then correlated with the product, brand, and/or media usage (Belch & Belch, 1995). Life style has been defined in a variety of ways, but is in essence: "the person's pattern of living in the world as expressed in activities, interests and opinions" (Wilson *et al.*, 1993).

This method attempts to provide a detailed understanding of tourists in terms of their way of living. It takes into account how people spend their time, what they consider important, and their opinions and attitudes towards various types of holidays/vacations. In order to compete successfully in the highly competitive international tourism marketplace, it is necessary to sharpen the research tools in an attempt to generate more accurate data for strategic tourism development and planning. Within this context, knowledge about relevant segments of tourists, their desires, motives, attitudes, and life styles, allows marketing strategists to become more focused and effective in their efforts (Slabbert, 2002).

e) Geographic segmentation

Geographic segmentation is based on where people live. The premise is that people who live in similar types of residential districts have similar characteristics and hence similar behaviour patterns (Proctor, 1996). Among the undoubted attractions of geographic segmentation to the marketing strategist are its flexibility and its apparent simplicity. It is the combination of these, together with its broad applicability, that has led to its widespread use (Semenik, 2002). By using this method the market is divided into different geographic units, such as nations, states, regions, destinations or cities. A destination decides to operate in one or a few geographical areas or to operate in all; paying attention to geographical differences in needs and wants (Kotler *et al.*, 1998).

f) Behavioural segmentation

Behavioural segmentation is based on a series of behavioural measures including attitudes, knowledge, benefits sought by the buyer, a willingness to innovate, loyalty status, usage rates, and response to a product. This is based on the assumption that it is the benefits people are seeking from a product that provide the most appropriate bases for dividing a market (Bennett, 2000:200-201; Wilson *et al.*, 1993). For example segmentation may be based on product or brand usage, degree of use (heavy vs light) and/or brand loyalty. Many marketing strategists believe that the behaviour bases are the best starting point for building market segments.

Behavioural patterns can be differentiated by occasions, benefits, user status and usage rate. *Occasions* are situations where one can distinguish between buyers according to when they purchased or used a product or service. Some buyers use a product very regularly, whilst others may use it only on special occasions (Strydom *et al.*, 2000). Behavioural segmentation methods can be applied to products, which are purchased to celebrate an occasion. For example, holidays, weddings, birthdays or seasonal events such as Christmas or Easter (Proctor, 1996).

Benefit segmentation begins, therefore, by determining the principal *benefits* tourists are seeking in the product class, the kinds of people who look for each benefit, and the benefits delivered by each brand (Wilson *et al.*, 1993), for example a late entrant in the adventure tourism market can gain a share by concentrating on two distinct benefit segments: those who were first time adventurers and those that have been involved in this type of tourism.

As an alternative to benefit segmentation, markets can be subdivided on the basis of what is referred to as *user status*. Thus, a number of segments can typically be identified including non-users, ex-users, potential users, first-time users and regular users. These two categories can then be subdivided further on the basis of usage rate (sometimes referred to as volume segmentation). For many destinations the marketing task is seen in terms of moving buyers and potential buyers along the buying continuum, thus, non-users and potential users all need to be persuaded to try the product, whole first-time users need to be persuaded to become medium users, and medium users to become heavy users (Wilson *et* *al.*, 1993). While the regular users guaranteed survival in the medium term, potential users who can be enticed into becoming users represent future growth. Each segment would be approached differently as the marketing task would vary according to user status. Usage rate is used to segment the market into light-, medium-, and heavy user groups. Issues for critical thinking can include the following:

- Are heavy users those who use the product the most? Heavy users are often a small percentage of the market, but account for a high percentage of total buying.
- Are heavy users necessarily the best segment for you to go after?
- Do you think heavy users are the most likely to switch from their regular brand to another?
- What might cause them to switch?
- How can you as a marketing strategist take advantage of such switching opportunities? (Nickels & Wood, 1997).

A market can also be segmented by consumer loyalty. Buyers can be divided into groups according to their *degree of loyalty*. Some tourists are completely loyal – they visit the same attraction every year. Others are somewhat loyal – they favour one attraction but sometimes visit other attractions as well. Other tourists show no loyalty to any attraction. They want something different each time they go on vacation. Each attraction is made up of different numbers of each type of buyer (Wilson *et al.*, 1993). Table 2.4 outlines the segmentation bases that might be used.

Table 2.4: Segmentation bases for tourism markets

SOCIO-ECONOMIC AND DEMOGRAPHIC VARIABLES
Age
Education
Gender
Marital status
Income
Family size
Family life cycle
Social class
Home ownership
Second Home ownership
Race or ethnic group

Nationality
Religion
Occupation
PRODUCT-RELATED VARIABLES
Recreation activity
Equipment type
Volume usage
Brand loyalty
Benefit expectations
Length of stay
Transportation mode
Experience preferences
Participation patterns
PSYCHOGRAPHIC VARIABLES
Personality traits
Life-style
Attitudes, interests, opinions
Motivations
GEOGRAPHIC VARIABLES
Destination
Region
State
City
Neighbourhood
Climate
Transportation
Government
Mobility
Market area
Urban, suburban, rural
City size
Population density
BEHAVIOURAL SEGMENTATION
Occasions/ critical events
Benefits sought
Usage rates
User status
Loyalty

(Bennett, 2000:201; Nickels & Wood, 1997; Kotler *et al.*, 1998; Saayman, 2001b; Horner & Swarbrooke, 1996; Lamb *et al., 2002*)

2.4.2.2 Methods for deriving segments

There are a variety of methods that can be used to form the markets and includes the following:

a) Cluster Analysis

Cluster analysis is a technique very often used in tourist market segmentation. It leads to a typology of tourists (Witt & Moutinho, 1995). These methods begin with a data set of actual or potential tourists and then form groups (segments). Cluster analysis is a set of techniques that try to define clusters of objects that are like each other within each cluster (Randall, 2001). It examines several bases together rather than singly. One way of generating segments is to collect data from a sample of tourists on a series of bases and then form groups by using cluster analysis. Basically these procedures group together tourists with similar profiles on the measured bases, and are thus totally dependent on the choice of those bases. This is sometimes called looking for natural clusters, which was the purpose of cluster analysis (Lehmann & Winer, 1997). This method is for those that are interested in a practical, cost-effective approach to market segmentation analysis (Arimond & Elfessi, 2001; Perreault & McCarthy, 1999).

b) Regression analysis / Discriminant analysis

Rather than treat all the bases as equal as in cluster analysis, one can specify a key base (for example usage rate) and then attempt to find which other bases (for example income) are most highly related to it. This method tries to find people who are similar to each other, and different from others. The market is then segmented on the basis of these bases/discriminants. A good discriminant function will classify all individuals into groups, and show the relative importance of each predictor in the classification (Lehmann & Winer, 1997; Randall, 2001).

c) Automatic Interaction Detector (AID) analysis

This method's purpose is to group respondents with similar characteristics. Similarity among respondents is determined by the value of a particular continuous dependent base for those respondents. AID successively splits up a sample of respondents in such a way that the variance of the dependent base is explained at a maximum. It does so by selecting the appropriate categories of the independent bases. It differs from cluster analysis in two respects. First, AID makes a distinction between one continuous dependent base and one or more nominal independent bases. All bases used in a cluster analysis are interval-scaled independent bases. Second, the grouping in AID is based on the value of a selected single dependent base. In cluster analysis all bases are simultaneously considered (Witt & Moutinho, 1995).

This method was developed to cope with the problem that, in marketing, bases are quiet often correlated with each other, so that discriminant analysis cannot be used. AID splits the sample into groups in a succession of stages, at each stage trying to maximize the variance between groups. As each group is split further at each stage, the cells can become very small very quickly, and this may be a problem with sample survey data (Randall, 2001).

d) Latent class analysis

The two first methods begin with individual tourists and then aggregate them. Latent class methods, by contrast, begin with the market as a whole and then determine what segmentation pattern best trades off parsimony (few segments) and the ability to explain overall behaviour based on derived segments in which all tourists in a segment behave identically. This approach is intriguing but requires considerable sophistication, and is not yet widely employed. This method can be used to give a destination a competitive advantage (Lehmann & Winer, 1997). This method derives segment level probabilities and market shares.

e) Judgment based segmentation

There is a strong tendency to derive segments by examining data. Some of the most useful segmentation schemes are simply descriptors on bases selected by marketers such as usage rate or product preference. These are often more useful than so-called clusters because the segments are readily identifiable and reachable and obviously have responded differently to the product offering (Lehmann & Winer, 1997).

f) Factor and component analysis

These two are related techniques based on the correlation coefficients of the bases. The technique searches for the factors or components that explain the underlying patterns, usually, the first two or three explain most of the variance, and the results can be mapped. The most common use is, in practice, to reduce large numbers of bases to a more manageable size. These may be inputs to a discriminant analysis. The factors have to be interpreted, and are often rotated if no clear pattern emerges. Both involve subjective judgements (Randall, 2001).

g) Expenditure patterns

Segmenting travel markets on the basis of travel expenditures may be a useful alternative to the more common approach of segmenting on the basis of travel activity when some type of volume segmentation is desired. This is because travel-marketing strategists of course usually seek tourists who will spend money, and not just time, on the premises of their establishment. Travel expenditures for a given unit of travel activity obviously can vary significantly from one travel party to the next (Spotts & Mahoney, 1991).

Tourist spending at a destination reflects the value of tourism to an economy. Total visitor expenditure at a destination divided by the number of tourist days or nights gives the average expenditure per tourist (and per day), giving general indications of the type and quality of the traffic to a destination.

h) Arrival figures

Statistics are collected by enumeration at point of arrival and departure, from accommodations recorded, and from special surveys of tourists at destinations or at home (Leibold, 1992). Information needed:

- number of tourists to a destination over a given period, for example a year, season or an event
- average length of stay (Leibold, 1992)
- number of tourists from different destinations to specific attractions.

i) Mode of travel as a segment descriptor

Mode of travel might help explain travel behaviour. Attractions fail to reach the number of visitors and the income suggested by consultants, because of a lack of serious segmentation efforts. Segmentation by mode of travel is based on the following:

- Day trips: trips starting and finishing at home during the same day.
- Resort trips: trips to a place where the major part of the stay is at the accommodation location.
- Base holiday trips: the prime trips are going from home to a single

accommodation unit for a longer stay than three nights. These visitors do take some day trips out of the accommodation area, for example to visit attractions, in addition to using on site attractions.

- Tour operated round trips: mainly by coaches- where the tourists are visiting new places every day and night. A few of those trips are based on using railroads and local bus routes.
- Round trips by private cars or camper vans: is in principle organised as the tour operated ones, but those driving in private cars have more freedom of individual choice during the trips (Flognfeldt, 1999).

j) Travel motivation

All motivations are imprecise and evolving, but all are within the parameters of social and economic determinants such as affluence, demographics, holiday entitlements, fashion and speed of travel.

The motivations at work in the tourism and holiday-decision process are extremely complex. There are primary and secondary motivations and sometimes the secondary motivations can be a stronger influence than the primary, insofar as they can affect the choice of destination. There is also what one might call the parameters of possibility, which equally can override the primary motivation (Lamb *et al.*, 2002).

k) Economic impact analysis

Economic impact analysis is used to measure the volume of income, employment, public sector revenue and imports generated in a holiday area by tourist-spending and to calculate the differential impacts made by tourists from various destinations (Archer, 1985). Economists have traditionally used input-output (IO) analysis to examine the impacts of tourism on the economy of a region. Input-output analysis is a general equilibrium approach to examining the structure of an economy, its dependencies and the economic impact of exogenous changes in final demand (Witt & Moutinho, 1995). Computable general equilibrium (CGE) can be used to fulfil the same function as IO. IO analysis deals with the empirical study of the interdependence among the various sectors of an economic area. It shows the uses of the output from each sector of industry as an input to other industries/sectors in the economy (Zhou *et al.,* 1997). A major constraint in IO modelling is the availability of data.

CGE incorporates general equilibrium links between production structures, incomes of various groups, and demand patterns. This technique can better capture the intersectoral and macro-economic linkages (Zhou, 1997). Both of the above-mentioned techniques are tools for conducting comparative analysis.

The major segmentation bases can be classified into five groups: geographic, demographic, socio-economic, psychographic and buyer behaviour. In certain cases a more sophisticated approach may be required. Therefore, a number of methods can be applied such as cluster analysis, AID analysis and regression analysis (Witt & Moutinho, 1995).

2.4.2.3 Target marketing strategies

Target marketing decisions determine the number of segments to target and the plans for product, price, channel management, and integrated marketing communication to reach these segments. One can choose among four target marketing strategies: undifferentiated marketing, differentiated marketing, concentrated marketing and customised marketing to select the target market (Nickels & Wood, 1997).

a) **Undifferentiated (mass) marketing** is actually no segmentation strategy. It is designed to appeal to all customers, marketing to the world rather than to individual segments. It means making a single offering to the whole market (Randall, 2001). The goal is to maximise sales without diversifying the price, product or service, through a single marketing plan including a single product or service offering. This approach assumes very similar characteristics and needs for all tourists rather than the differences. It relies on mass distribution and mass advertising and aims to give the product a superior image in tourists' minds (Lamb *et al.*, 2002). Such an approach requires a great amount of resources. It is a very costly approach. The obvious advantage of an undifferentiated strategy such as this is that it offers scope for enormous cost economies in production and distribution since the destination is dealing with a standardised product. At the same time it needs to be recognised that undifferentiated marketing is becoming increasingly rare, largely because of ever-greater degrees of competition and the markets (Wilson *et al.*, 1993). Differentiated marketing is successful when the competition is scarce or the product has mass appeal.

b) **Differentiated (multiple market segmentation) marketing** is when a destination chooses more than one target market segment and prepares marketing mixes for each one (different things to different segments) (Randall, 2001). This is often described as a 'rifle' rather than a 'shotgun' approach. The marketing strategist appeals to two or more well-defined groups through different plans (marketing mixes). In this way one can use marketing to support the unique positioning for each market. One needs to look carefully at the needs of each segment with a view to designing an appropriate marketing programme (Nickels & Wood, 1997). This requires larger resources split towards various segments (Anon, 2000). A tourist attraction like Lost City can fulfil different needs of different target groups and therefore market segmentation must be done on a differentiated method to present to the different markets the different benefits of Lost City. It is possible that the destination will be able to generate a higher total level of sales by making specific appeals to a variety of different target groups (Wilson *et al.*, 1993).

c) **Concentrated (niche) marketing** is when a marketer selects one segment, develops an appropriate marketing mix, and directs its marketing efforts and resources exclusively toward that market segment. A competitive advantage can then be established by the marketer. This approach allows for focused effort. It allows the marketing strategist to develop expertise. The goal here is to achieve a large share of a relatively small market. It is often called niche marketing. Through concentrated marketing the destination achieves a strong market position in the segments it serves because of its greater knowledge of the segments' needs and the special reputation it acquires. The segment one chooses must have sufficient potential to make the efforts worthwhile. The obvious advantage of an approach such as this is that having identified a particular market, the destination can then control costs by advertising and distributing only to the market it views as its primary target (Wilson *et al.*, 1993; George, 2002). The dangers are: (I) the selected marketing segment is too narrow; and (ii) the wrong target market is selected (Moutinho, 2000; Kotler & Armstrong 2001:266; Bennett, 2000:199; Kotler *et al.*, 1998:266-267).

d) **Customised marketing** is when a market is so diverse that the company attempts to

satisfy each customer's unique set of needs with a separate marketing mix (Moutinho, 2000). In customised marketing, also known as individualised or one-to-one marketing, each customer or prospect is a market segment. One can adjust the product, pricing, channel management, and integrated marketing communication for each person targeted (Nickels & Wood, 1997). This implies high costs. Table 2.5 summarises the strategies by indicating the possible advantages and disadvantages of all the above-mentioned strategies.

Table 2.5: Advantages and disadvantages of target marketing strategies

TARGET STRATEGY	ADVANTAGES	DISADVANTAGES
Undifferentiated marketing	Potential savings on production/marketing costs Destination more susceptible to competition	Unimaginative product offerings
Differentiated marketing	Unique positioning for each market segment Generate higher level of sales by making specific appeals to a variety of different market segments	Requires larger resources
Concentrated marketing	Concentration of resources Can better meet the needs of a narrowly defined segment Allows some small destinations to better compete with larger destinations Strong positioning	Segments too small, or changing Large competitors may more effectively market to niche segment
Customised marketing	Greater financial success Economies of scale in production/marketing	High costs

(Lamb *et al.*, 2002)

➢ **Selecting market segments**

Segmentation reveals market opportunities available to a destination. The destination then selects the most attractive segment or segments to serve as targets for marketing strategies to achieve desired objectives. Destinations need to consider several factors in choosing a target marketing strategy:

- Destination resources. When the destination's resources are limited, concentrated marketing makes the most sense.
- Degree of product homogeneity. Undifferentiated marketing is more suited for homogeneous products. Products that can vary in design, such as restaurants and hotels, are more suited to differentiation or concentration.

- Market homogeneity. If buyers have the same tastes, buy the same products, and react the same way to marketing efforts, undifferentiated marketing is appropriate.
- Competitors' strategies. When competitors use segmentation, undifferentiated marketing can be suicidal. Conversely, when competitors use undifferentiated marketing, a firm can gain an advantage by using differentiated or concentrated marketing (Bennett, 2000:199; Kotler *et al.*, 1998:266-267).

➢ **Requirements for Effective Segmentation**

- *Measurability*: the degree to which the segment's size and purchasing power can be measured.
- *Accessibility*: the degree to which segments can be accessed and served.
- *Substantiality*: the degree to which segments are large or profitable enough to serve as markets.
- *Actionability:* the degree to which effective programmes can be designed for attracting and serving segments (Bennett, 2000:1999; Kotler *et al* 1998:266-267).
- *Generalisability*: the generalisability of the results is important. Segmentation is not done simply to describe a sample but to provide information that may be generalisable to a larger population (Smith, 1996).
- *Unique*: in its response, so that it can be distinguished from other market segments.
- *Appropriate:* to the destination's objectives and resources (Wilson *et al.*, 1993).
- *Stable:* so that its behaviour in the future can be predicted with a sufficient degree of confidence (Lehmann & Winer, 1997; McDonald & Keegan, 2002).

➢ **Evaluating market segments**

- Segment size and growth. Destinations will analyse the segment size and growth and choose the segment that provides the best opportunity.
- Segment structural attractiveness. A destination must examine major structural factors that effect long-run segment attractiveness.

- Destination objectives and resources. A destination must consider its own objectives and resources in relation to a market segment.

2.4.2.4 Market positioning

A product's position is the way the product is defined by consumers on important attributes- the place the product occupies within consumers' minds relative to competing products (Bennett, 2000:199; Kotler *et al.,* 1998:266-267). Marketing strategists can follow several positioning strategies. Products can be positioned according to:

- Specific product attributes. Price and product features can be used to position a product.
- Needs products fill or the benefits they offer. Marketers can position products by the needs that they fill or the benefits that they offer. For example, a restaurant can be positioned as a fun place.
- Certain classes of users. Marketers can also position for certain classes of users, such as a hotel advertising itself as a women's hotel.
- Against an existing competitor. A product can be positioned against an existing competitor (Bennett, 2000:199; Kotler *et al.*, 1998:266-267).

a) Choosing and implementing a positioning strategy

The positioning task consists of three steps: identifying a set of possible competitive advantages upon which to build a position, selecting the right competitive advantages, and effectively communicating and delivering the chosen position to a carefully selected target market (Bennett, 2000:199; Kotler *et al*., 1998:266-267).

b) Communicating and delivering the chosen position

Once having chosen positioning characteristics and a positioning statement, a destination must communicate its position to targeted customers. All of a destination's marketing mix efforts must support its positioning strategy (Bennett, 2000:199; Kotler *et al.,* 1998:266-267).

c) Establishing a clear, distinctive and desirable place relative to competing products in the minds of the target customer

Segmentation is undertaken for different reasons. Although most segmentation research is conducted for marketing problems, it is also a tool for the study of consumer behaviour. In the case of marketing, segmentation may be used to increase total sales, to improve the cost-effectiveness of advertising, to improve net profits, or to increase market share. Segmentation can help achieve these goals in several ways. Given an appropriately defined set of descriptors, segmentation research can provide information on:

- the reasons different groups of people buy a product or visit a destination;
- how big these groups are;
- the spending patterns of these groups;
- their loyalty to brand names or destinations;
- their sensitivity to price;
- how they respond to various advertising, pricing and distribution strategies;
- how to design an advertising message or new product to generate sales in a specific market;
- which advertising channel will most effectively reach the target market;
- whether a new product should be introduced; or
- whether an existing product should be redesigned, re-positioned or discontinued.

Segmentation can define life-style characteristics for the study of sub-populations in performing arts audiences, visitors to festivals, or families that take vacations. Segmentation can help provide insights into the motivations and other relevant characteristics of people who have particular political orientations, such as being pro-tourism or anti-tourism development (Smith, 1995:97-98).

2.4.3 Step 3: Develop a marketing mix

According to Kotler (1994:98) a marketing mix is the set of marketing tools that a destination uses to pursue its marketing objectives in the target market. The marketing mix is comprised of four elements- product, price, promotion, and distribution. All four elements are provided in accordance with the needs of the target markets (Mill & Morrison, 1985:374). The four P's was originally used to describe the marketing mix in 1960 by McCarthy (1981:42).

Perceiving that the original McCarthy principles are stated in producer oriented terms, Kotler restated the 'Ps as 'Cs' to reflect the consumer orientation that is central to modern services marketing thinking in an area of growing competition (Kotler & Armstrong, 1999:111).

The marketing mix form part of a marketing strategy: which includes the following (a) Product plan, (b) Distribution (place) plan (c) Price plan (d) Communication (promotion) plan.

2.4.3.1 Product plan

Product means *customer value* (the perceived benefits provided to meet needs and wants, quality of service received and the value for money delivered assessed against the competition, (Kotler & Armstrong, 1999:111). Product covers the shape or form of what is offered to prospective customers; in other words, the characteristics of the product as designed by strategic management decisions in response to marketing managers' knowledge of consumer wants, needs and benefits sought. For tourism, product components include:

- Basic design of all the components that are put together as an offer to customers, for example a short-break package by a hotel group.
- Style and ambience of the offer. For service products dealing with customers on the premises where products are delivered, this is mainly a function of design decisions creating the physical environment, and ambience (also known as 'physical evidence') judged appropriate to the product's image and price.
- The service element, including numbers, training, attitudes and appearance of all staff engaged in the processes that 'deliver' the product to the consumer-especially front of house staff.
- Branding, the focus for communications, which identifies particular products with a particular product with a particular set of values, a unique name, image and expectation of the experience to be delivered (Middleton, 2001:89).

The product strategy accepted by the business is probably the most important factor for long-term success, but continual success will depend on the ability of the product to adapt to a dynamic market environment. The following questions must be answered by the product plan:

- Which needs do the product satisfy?
- Who represents the existing market?
- What are the sales statistics of the product?
- What are the competitors' strong points for the same similar product? (Saayman, 2001b).

2.4.3.2 Distribution / place plan

Place/ distribution access means *convenience* (in terms of consumer access to the products they buy, Kotler & Armstrong, 1999:111). Place does not just mean the location of a tourist attraction or facility. It means the location of all the points of sale that provide prospective customers with access to tourist products. Place or convenience can include the numerous travel agents and tour operators, direct mail to homes of prospective buyers, using free-phone numbers and easy access to products via computerised reservation/ booking systems (Middleton, 2001:91-92).

The distribution channels must be based on the needs of the market and the ability of the business to meet demands. The total distribution costs of the business are determined by facilities, transport, communication, and location. Furthermore, there are also basic objectives of the distribution plan, namely:

- Market penetration objectives.
- Information dissemination.
- Distribution objectives and promotion activities.
- Accessibility and signage.

Questions that must be answered in the distribution plan are:

- How much communication is necessary to ensure that distribution will take place according to plan?
- What are the distribution channels and what types of channels are used by competitors?
- What needs to be done in order to enhance accessibility? (Saayman, 2001b).

A distribution channel can also be referred to as a marketing channel. According to Johnston (1997) marketing channels are described as "sets of interdependent organisations involved in the process of making a product or service available for use or consumption". Marketing theory suggests that a service must consist of four inseparable types of utility (form, time, place and possession) to be a 'complete' product. A marketing channel to a great extent provides the latter three of these through providing a means of delivery. "As marketers continue to face hostile, unstable and competitive environments, distribution will play an increasingly important role".

All intermediaries must contribute to the creation of value to justify their role in the channel. Intermediaries become assimilated into a marketing channel over time when they can perform a function which 'adds value' to the channel. Johnston (1997) describe this 'added-value' as ".....the change in the product characteristics from the time the ingredients enter the organisation to the time the product is sold by the organisation...." If an intermediary carries out an activity which benefits the customer, and therefore, builds an augmented product for the customer, then that intermediary can justify his/her place in the marketing chain (Johnston, 1997:13).

According to Kotler *et al.*, (1998: 481) a distribution channel has the following functions:

- *Information*: gathering and distributing marketing research and intelligence information about the marketing environment.
- *Promotion:* developing and spreading persuasive communications about an offer.
- *Contact:* finding and communicating with prospective buyers.

- *Matching:* shaping and fitting the offer to the buyers' needs.
- *Negotiation:* agreeing on price and other terms of the offer so that ownership or possession can be transferred.
- *Physical distribution:* transporting and storing goods.
- *Financing:* acquiring and using funds to cover the cost of channel work.
- *Risk-taking:* assuming financial risks, such as the inability to sell inventory at full margin.

Small businesses face particular problems when conducting market campaigns due to their relatively limited resources. The international nature of the travel and tourism industry requires that businesses operating within that sector adopt globalised marketing activities. To succeed, small businesses in the travel industry have had to develop a complex and multi-levelled channel of relationships to bring their services to the market and reach their potential customers (Johnston, 1997:25).

The model of the marketing channel is presented in Figure 2.3. It is developed specifically for the travel and tourism industry.

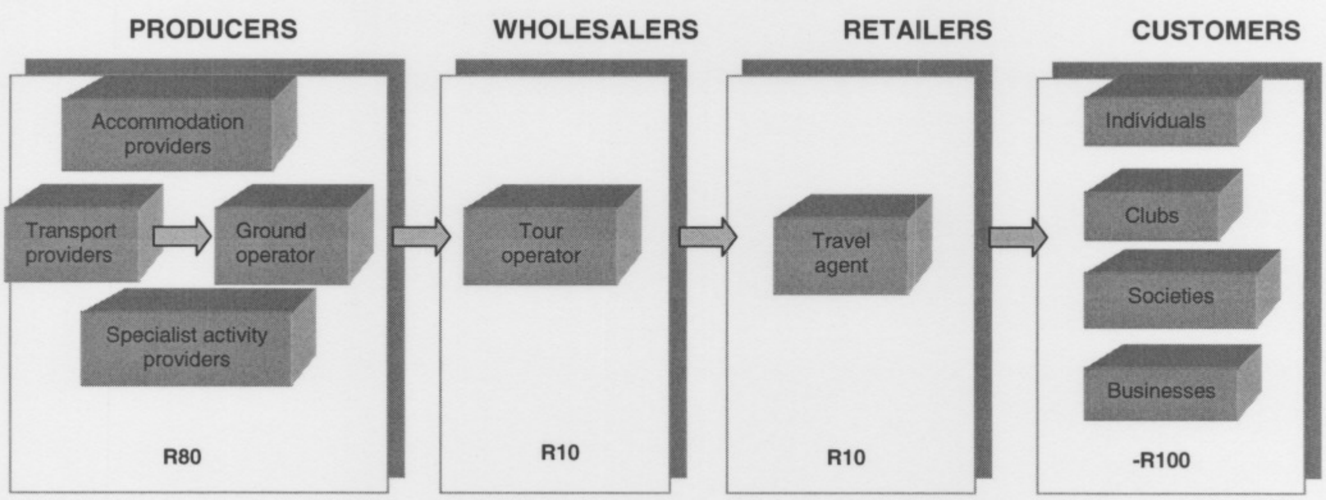

Figure 2.3: A travel industry marketing model (Johnston, 1997:25)

2.4.3.3 Price plan

Price means *cost* (price is a supply-side decision, cost is the consumer-focused equivalent also assessed against the competition, (Kotler & Armstrong, 1999:111). Price denotes the published or negotiated terms of the exchange transaction between a producer aiming to achieve predetermined sales volume and revenue objectives, and prospective customers seeking to maximise their perceptions of value for money in the choices they make between alternative products. Almost invariably, in tourism, there is a published/ regular price for a product and one or more discounted or promotional prices. Promotional prices respond to the requirements of particular market segments or the need to manipulate demand to counter the effects of seasonality or competition resulting from over- capacity (Middleton, 2001:90).

The importance of price-fixing lies in the fact that it directly influences income and profit. The price of the product determines the profit margin. Price ought to be a reflection of the quality of the product. Increased prices can lead to a decline in demand, while lower prices can lead to an increase in demand. Different budgets must be set up in order to apply financial control. The following must be kept in mind in the preparation of the price plan:

- What are the overhead price objectives?
- What is the competitor's price?
- What price control is there?
- What is the ability of the business to react to competitors' price changes? (Saayman, 2001b).

2.4.3.4 Communication/ promotion plan

According to Kotler & Armstrong (2001:512) a communication mix is also called its promotion mix which consists of the specific blend of advertising, personal selling, sales promotion, public relations, and direct-marketing tools that the destination uses to pursue its advertising and marketing objectives which form the communication/promotion plan. Definitions of the five major promotion tools is as follows:

- Advertising

Any paid form of non-personal presentation and promotion of ideas, goods, or services by an identified sponsor.

- Personal selling

Personal presentation of a destinations sales force for the purpose of making sales and building customer relationships.

- Sales promotion

Short-term incentives to encourage the purchase or sale of a product or service.

- Public relations

Building good relations with the destination's various publics by obtaining favourable publicity, building up a good corporate image, and handling or heading of unfavourable rumours, stories, and events.

- Direct marketing

Direct connections with carefully targeted individual consumers to both obtain an immediate response and cultivate lasting customer relationships-the use of telephone, mail, fax, e-mail, the internet, and other tools to communicate directly with specific consumers.

The following must be answered by the promotion/communication plan:

- What does the promotion/ communication mixture consist of?
- What does the target market consist of?
- What are the advertising objectives and how are they going to be achieved? (Pitt *et al.*, 1995).

According to Bennett (2000:220) a destination has six distinct ways of communicating the promotional message to the public:

- By advertising the product through a selected medium such as the press, radio or television.

- By using staff to engage in personal selling, either behind the counter, over the phone or by calling on clients.
- By engaging in sales promotion activities such as exhibitions, competitions, displays.
- By generating publicity about the product through public relations activities.
- By sponsorship
- Through the internet

Botha (1996) recommended that marketing communications should be aimed to deliver a message portraying a youthful, fulfilled image through the use of brochures, flyers, or advertisements. The media play an integral role in creating a destination's image, and selection of the right media to reach a specific target market is essential. Saayman (2001b) and various other authors, including Dunn & Barban (1986), McGann & Russel (1981) and Pride & Ferrel (1987) listed the main media available to the tourism industry and included an assessment of their strong and weak points. This assessment is summarised in Table 2.6.

Table 2.6 The strengths and weaknesses of alternative media

Medium	Types	Unit of Scale	Factors Affecting Rates	Cost Comparison Indicator	Advantages	Disadvantages
Newspaper	-Morning -Evening -Sunday -Sunday supplement -Weekly -Special	-agent lines -column inches -counted words -printed lines	-Volume and frequency discounts -Number of colours -Position charges for preferred and guaranteed positions -Circulation level	Million rate= Production costs x 1000000 divided by circulation	-Almost everyone reads a newspaper; -purchased to be read -national geographic flexibility -short lead time -frequent publication -favourable for co-operative advertising -merchandising services	-Not selective for socio-economic groups -short life -limited reproduction capabilities -large ad volume limits exposure to only one advertisement
Magazine	Consumer -Farm -Business	-pages -partial pages -column inches	-circulation level -cost of publishing -type of audience -volume discounts -frequency -discounts -size of advertisement (covers) -number of colours -regional issues	Cost per thousand (CPM)= cost per page x 1000 divided by circulation	-Socio-economic selectivity -good reproduction -long life -prestige -geographic selectivity when regional issues are available -read in leisurely manner	-High absolute dollar/euro costs -long lead time
Direct Mail	-Letters -Catalogues -Price lists -Calendars -Circulars	Not applicable	-cost of mailing lists -postage -production costs	Cost per contract	-little wasted circulation -highly selective -circulation controlled by advertiser -few distractions -personal stimulates actions	-expensive -no editorial matter to attract readers -considered junk mail by many -criticised as invasion of privacy

Medium	Types	Unit of Scale	Factors Affecting Rates	Cost Comparison Indicator	Advantages	Disadvantages
	-Newsletters -Postcards -Booklets -Broadsides -Samplers				-use of novelty -relatively easy to measure performance -hidden from competitors	
Radio	-AM -FM	-Programmes: sole sponsor, co-sponsor, participate sponsor -Spots: 5, 10, 20, 30, 60 seconds	-time of day -audience size -length of spot or programme -volume and frequency discounts	Cost per thousand (CPM0)= cost per minute x 1000 divided by audience size	-highly mobile -low cost broadcast medium -message can be quickly changed -can reach a large audience -geographic selectivity -socio-economic selectivity	-provides only audio message -has lost prestige -short life of message -listeners' attention -limited because of other activities while listening
Television	-Network -Local -CATV	-Programmes: sole sponsor, co-sponsor, participate sponsor -Spots: 5, 10, 20, 30, 60 seconds	-time of day -length of programme -volume and frequency discounts -audience size	Cost per thousand (CPM)= cost per minute x 1000 divided by audience size	-Reaches large audience -low cost per exposure -uses audio and video -highly visible -high prestige -geographic selectivity -socio- economic selectivity	-High-dollar/euro costs -highly perishable message -size of audience not guaranteed -amount of prime time limited
Inside transit	-Buses -Subways	Full, half and quarter showings are sold on a monthly basis	-number of riders -multiple-month discounts -production costs -position	Cost per thousand riders	-Low cost -Captive audience -Geographic selectivity	-does not reach many professional persons; does not secure quick results
Outside transit	-Buses -Taxicabs	-Full, half and quarter showings	-number of advertisements -position	Cost per thousand exposures	-low cost -reaches broad, diverse audience -geographic selectivity	-lacks socio-economic selectivity; does not have high impact on readers

Medium	**Types**	**Unit of Scale**	**Factors Affecting Rates**	**Cost Comparison Indicator**	**Advantages**	**Disadvantages**
		-space also rented on per-unit basis	-size			
Outdoor	-Papered posters -Painted displays -Spectacu-lars	-papered posters sold on monthly basis in multiples called 'showings' -painted displays and spectaculars: sold on per unit-basis	Length of time purchased -land rental -cost of production -intensity of traffic -frequency and continuity discounts -location	No standard indicator	allows for repetition -low cost -message can be placed close to the point of sale -geographic selectivity -operable 24 hours a day	-message must be short and simple -no socio-economic selectivity -seldom attracts readers' full attention -criticised as being traffic hazard and blight on destination side

(Saayman, 2001b; Dunn & Barban, 1986; McGann & Russel,1981; Pride & Ferrel,1987).

2.4.4 Step 4: Formulating marketing strategies

Saayman (2001b) and Walker *et al.*, (1992) suggested the following marketing strategies or approaches that can be used for specific market situations:

a) Awareness strategy

The aim of the awareness strategy is to increase tourists awareness and willingness to visit a destination by doing more and better advertising. The image of South Africa must make potential tourists aware of the destination. The focus should be on the unique, the unpredictable, the interesting and the striking features of the destination. The slogan, "a world in one country" includes these features. The Africa theme, as well as the final destination of ecotourism also fulfils the purpose. This strategy focus on senses, emotions and thoughts.

b) Trust strategy

The aim of the trust strategy is to obtain trust. This strategy should especially be used in situations where a country has a negative image as a result of problems such as terrorism, theft and crime. South Africa can implement a trust strategy by representing important and friendship figures, for example Nelson Mandela. A merry Cape Malay can, for example, introduce the Cape to the target tourist. Non-verbal communication and key words are very important.

c) Needs-stimulation strategy

The aim of the needs-stimulation strategy is to fulfil needs. This marketing concept takes the needs of the tourist into consideration and tries to satisfy them. Target group identification determines the need which is to be emphasised. Tourists from the USA, Germany, Holland and England will have different distinctive needs. The advantages of a visit to South Africa must for every reason address those needs.

d) Market penetration strategy

The aim of the market penetration strategy is to attract tourists at a low tariff. The low tariff is only valid for a few months. This strategy goes hand in glove with transport and accommodation that is offered at low tariffs. Packages must thus be marketed and developed with the assistance of the private sector.

e) Reaction strategy

The aim of the reaction strategy is the conditioning of tourists. Potential tourists must be conditioned to come to South Africa. Hold big marketing campaigns in the Netherlands to present South Africa to the Dutch market. By doing this the Dutch market will be conditioned to come and visit South Africa. Repetition and reward are of importance to make tourist attractions attentive. The media plays a cardinal role in conditioning the potential tourists as well as satisfied tourists (word of mouth).

f) Spending versus volume strategy

The aim of the spending versus volume strategy is to attract a low volume of tourists that are high spenders. It is better for instance to attract 5 persons that spend a R1000 per day (total R5000) than 50 persons that spend R100 per day (total R5000). However, in Europe they follow a high volume, low spending strategy.

g) Maintenance strategy

The aim of the maintenance strategy is to maintain the market by maintaining satisfaction and loyalty. The arrival figures and growth rate should be maintained. This can be done by increasing the amount of holidays of the average tourist by increasing frequency of use or developing new and more varied ways to visit the destination. Offer affordable touring packages to the market and stay in contact with the tourists that visited the country by sending e-mails of touring specials.

A combination or only one of the above-mentioned marketing strategies can be used. The marketing strategy that is chosen depends on the type of market and what goal the destination wants to achieve.

2.4.5 Step 5: Implementation of marketing strategy

According to Kotler & Armstrong (2001:71) marketing implementation is the process that turns marketing strategies and plans into marketing actions in order to accomplish strategic marketing objectives.

According to Du Plessis *et al.* (2001) strategy implementation is 'how to do the marketing'. A strategy implementation checklist can be used for successful marketing strategy implementation and consists of the following:

- Clarity and simplicity of marketing-strategy objectives
- Clear link with organisational mission and strategy
- Sufficient top-management commitment and organisational participation
- Appropriate leadership style
- Competitive entrepreneurial culture with an emphasis on innovation
- Optimal structure for organisational effectiveness
- Change-management and internal marketing
- Sufficient resources committed
- Appropriate systems and controls
- Individual and organisational performance
- Organisational learning (Du Plessis *et al.*, 2001: 387)

Adcock (2000) indicates in Figure 2.4 the process that can be followed after the marketing strategy is implemented. After the marketing strategy is implemented, relationships should be built that last, customer or tourists should be taken care of and internal marketing should be done.

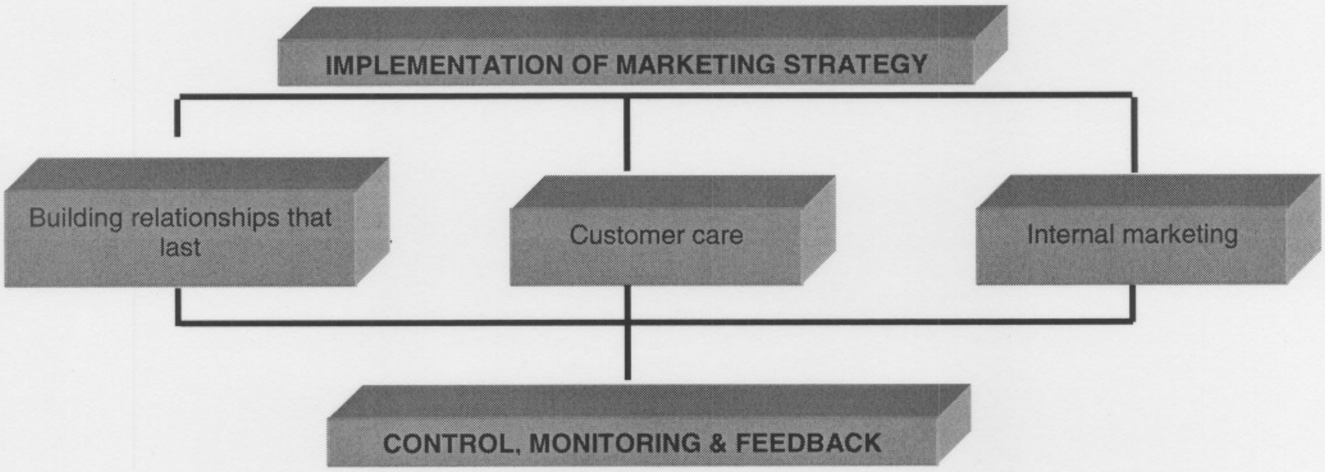

Figure 2.4: Implementation of marketing strategy (Adcock, 2000:2)

In a dynamic market with a future that is difficult to predict, the resulting actions stand more chance of success if they are well founded within the basic concept that underpins the exchange process. But it is necessary to blend an appropriate strategy to excellent implementation if real success is to be achieved. Bonoma (1984) summarised this neatly in Figure 2.5.

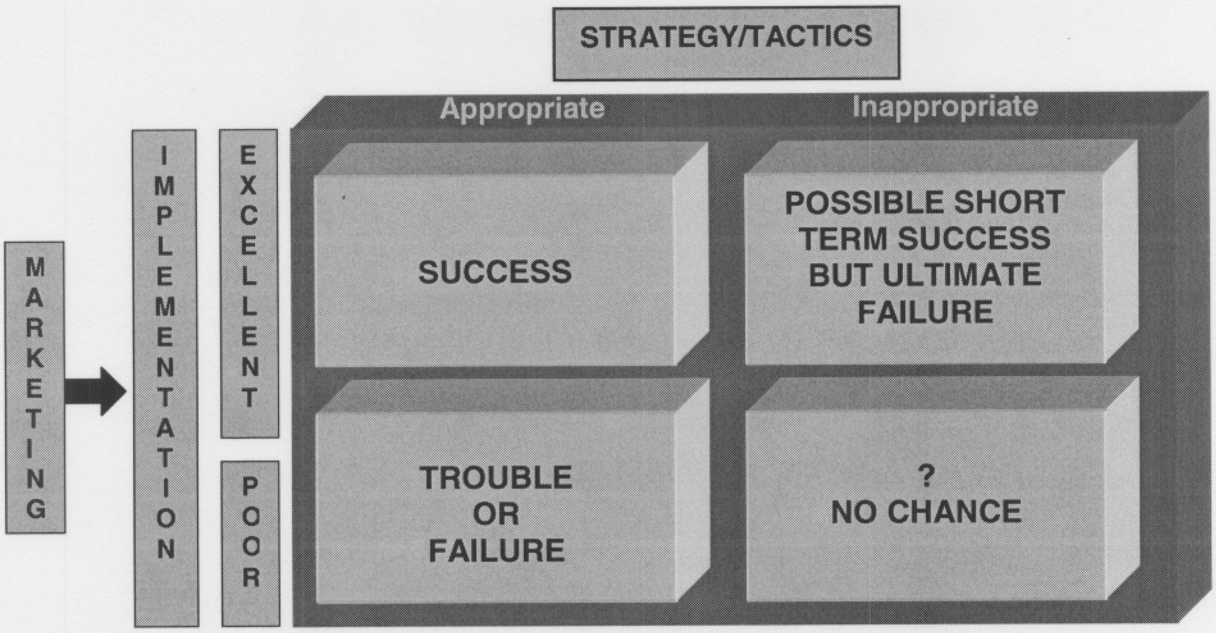

Figure 2.5: Marketing strategy and implementation diagnosis (Bonoma,1984)

In Figure 2.5 it can be seen that when a marketing strategy is implemented it could be an excellent or poor marketing strategy and the marketing strategy could be appropriate or inappropriate. If a marketing strategy is poor the marketing manager should strive to improve the marketing strategy and if it is an excellent marketing strategy the marketing manager should strive to maintain the marketing strategy.

2.4.6 Step 6: Evaluation of marketing strategy

Any resulting strategy must be evaluated from the viewpoint of the customer, who is the ultimate judge. However, such decisions as low price/high volume, heavy promotional spending.

According to Johnson & Scoles, (1997) and Adcock (2000) the test for a marketing strategy will be:

- Suitability to tourists in a dynamic competitive environment
- Feasibility of achievement by destination
- Acceptability to meet the needs/ expectations of tourists

Baker (2000) spelled out a 9 criteria for the evaluation of a strategy:

- Is the strategy identifiable and has it been made clear either in words or practice?
- Does the strategy exploit fully domestic and international environmental opportunity?
- Is the strategy consistent with corporate competences and resources, both present and projected?
- Are the major provisions of the strategy and the programme of major policies of which it is comprised internally consistent?
- Is the chosen level of risk feasible in economic and personal terms?
- Is the strategy appropriate to the personal values and aspirations of the key managers?
- Is the strategy appropriate to the desired level of contribution to society?
- Does the strategy constitute a clear stimulus to organisational effort and commitment?
- Are there early indications of the responsiveness of markets and market segments to the strategy?

The Jigsaw model of Piercy (1992) (Figure 2.6) can also be used to evaluate a marketing strategy. One of the ways of trying to get to grips with the marketing problem is to think in terms of a matching process. In other words achieving a "fit" between what the destination is and can be, and what matters to the paying tourist.

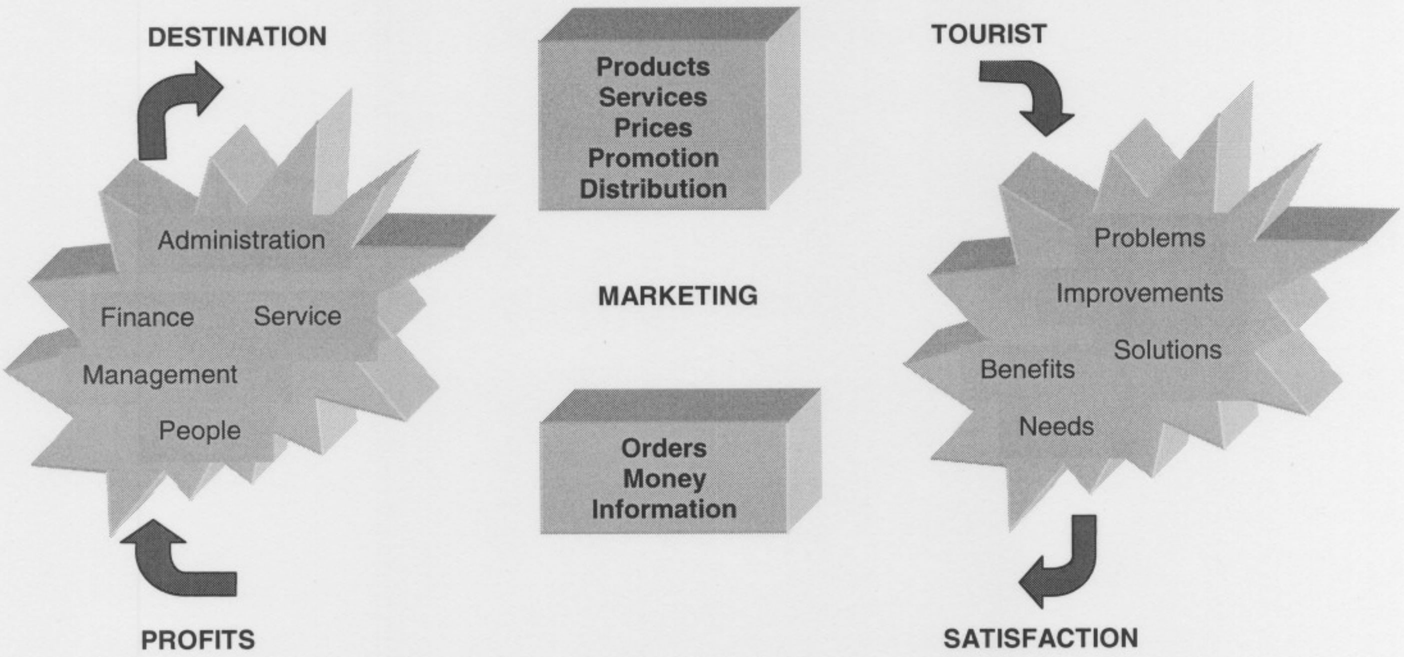

Figure 2.6: The Jigsaw Model (Piercy, 1992)

The destination must be driven through customer satisfaction management; changing organisation structures to fit better with the markets demands; changing the way that is looked at the market and what matters to customers; and, looking at the business operation through the customer's eyes and planning and budgeting accordingly (Piercy, 1992).

2.4.7 Step 7: Sustainability of marketing strategy

What makes a sustainable marketing strategy different from other marketing strategies is that:

A sustainable marketing strategy is a strategy where a steady growth rate is maintained, a market segment is identified, a marketing mix is developed for the specific segment and a balance between the demand and the supply of the tourism destination is sustained. The demand is what the tourists want/ need and the supply is what the destination can offer.

Sustainable development is also necessary for a sustainable marketing strategy, not a fixed state of equilibrium, but rather a process undergoing continual change in which the use of resources, type of investment, the direction of technological development, and institutional change are in harmony with both today's needs and those of tomorrow (Aronsson, 2000:16). The successful selling of a sustainable travel product or destination requires the travel professional to identify a potential buyer or tourist. Therefore, it is vital that travel professionals ask all the so-called "*wh*" qualifying questions. In addition to asking *wh*ere travellers want to go, travel professionals must discuss *wh*at travellers expect and, most importantly, *wh*y the travellers want to travel in order to obtain a good traveller-product match (Sorenson, 1997:264).

Saayman & Myburgh (1999) suggested the following criteria that can be used in order to determine the sustainability of a destination:

(a) Is the supply of attractions and accommodation adequate to meet the needs of visitors without losing the character of the place?

(b) Does an authentic body of cultural, historical, and other place-defining sites and attractions exist and is it the basis for an entertaining, educational visitor experience?

(c) Is there networking between communities out of which civic-mindedness, community pride, responsibility for one another and the community, and a shared vision for the present and future should emerge?

(d) Do business profits and employment opportunities accrue to the residents of the region?

(e) Is professionalism the watchword of the tourism industry?

(f) Is hospitality the prevalent attitude of the residents?

(g) Are market-driven visitor experiences organised, promoted, and made easily accessible and do they provide the opportunity for both small and large places to be competitive in the tourism marketplace?

(h) Are visitor safety and convenience paramount concerns?

(i) Is the regional economy diverse and stable, and is the contribution of tourism recognised and valued?

(j) Is a unique sense of locality characterised by tradition (social, religious, civic, and cultural).

For a organisation/destination to obtain a good traveller-product match it is necessary to have a sustainable competitive advantage (Jain, 1997:96). A sustainable competitive advantage may be defined as 'the ability to deliver superior value to the market for a protracted period of time (Du Plessis *et al.*, 2001). The value concept may be described as 'the tourists' subjective evaluation of the benefits received in relation to the costs'. The protracted period must be long enough for an organisation to recover its investment in a product/market and to be profitable. Furthermore it requires a sustainable competitive advantage in the erecting of barriers against the competition. A barrier may be erected based on size in the targeted market, superior access to resources or customers, and restrictions on competitors' options. Preferred access to resources or to customers enables a destination/organisation to secure a sustainable advantage if (a) the access is secured under better terms than competitors have and (b) the success can be maintained over the long run. Finally, a sustainable advantage can be gained if, for various reasons, competitors are restricted in their moves (e.g., pending antitrust action or given past investments or existing commitments, Jain (1997: 96).

According to Du Plessis *et al.* (2001:179) the following bases are necessary for developing a sustainable competitive advantage for marketing:

- customer (tourist) base
- customer (tourist) knowledge
- new product skills
- pricing
- marketing communications
- distribution
- sales force
- service support
- reputation.

A sustainable marketing strategy should be a focused strategy. A focussed marketing strategy wants to create a sustainable competitive advantage for a destination/organisation by opting to occupy only one, specific segment in the market, with a limited product range.

The following three factors determine how sustainable a focus marketing strategy is against competitors. These three factors are as follows:

- *Sustainability against targeted competitors.* A broadly targeted destination/organisation might already be a competitor in the focuser's segment or it could be a potential entrant into the segment. The focus strategy is also more sustainable when the different tourists' needs in the target segment are compared with those in other segments. The sustainability will erode if the differences between the segments diminish over time.
- *Sustainability against imitators.* A significant threat to a destination/organisation that focuses is that another destination/ organisation will copy the focus strategy. This threat could be from a totally new destination/organisation or from one that has re-evaluated its own strategy and has decided to follow an identical focus strategy. The size and growth rate of this segment will also affect the likelihood of imitation. If the segment is small and stable, entry could be difficult. If the segment is large and growing, there is always the possibility of entry or imitation.
- *Sustainability against segment substitutions.* There is also the threat that the segment could disappear altogether. Factors such as other tourism developments and changing of trends and exchange rates could lead to market eroding or disappearing completely (Du Plessis *et al,* 2001:205).

Middleton & Hawkins (1998) suggest the following marketing strategy process that can be followed to achieve more effective sustainable management of tourism destinations (see Table 2.7).

Table 2.7: Marketing strategy process for sustainable tourism management

Understanding demand and supply at destinations		
Knowledge of visitor segments	Numbers, expenditure, characteristics, motivations and behaviour patterns of customers/tourists	The basic requirement for all modern marketing, directly relevant to public sector planning

Influencing customer/tourist behaviour	Matching and sometimes leading segment expectations-determines core business decisions	
Influencing the behaviour of individuals and businesses		
Setting targets (by time)	Optimising chosen segments and products to meet targets	Negotiated by local public sector/private sector partnerships
Influencing customer/ tourist behaviour	By compiling a marketing mix, quality controls and consumer research	Normal product delivery processes
Influencing business behaviour	By codes of conduct, award schemes, trade association membership criteria, planning and licensing controls, and by purchasing policies requiring suppliers to meet environmental criteria	Role for trade associations, regulatory bodies, planning control, and professional bodies
Monitoring progress		
Customer/ tourist research by tourism businesses	Through information collected primarily as a byproduct of marketing and other businesses processes (e.g. accommodation occupancy studies)	Role for partnership between public and private sector
Destination research by partnership process		

(Middleton & Hawkins, 1998)

The following points amplify the three sections of Table 2.7:

- *Knowledge of segments and product formulation.* All modern businesses in competitive conditions regard these processes as the cornerstone of marketing management. It is also the basis for sustainable development. Product decisions within a destination are critical in determining tourism capacity and volume.
- *Setting targets locally is the essential first step in moving toward sustainable goals.* Targets have to be set by segments and product types, with regard to seasonality. The development of a marketing mix is also essential during this stage.
- *Systematic monitoring of progress is the only way to assess how far targets are achieved in practice.* To do tourism research of the market segment in the source market is also very important for monitoring progress (Middleton & Hawkins, 1998:120).

In conclusion a marketing strategy should be sustainable to maintain a steady growth rate and to enable the tourism marketer to maintain the balance between demand and supply in the tourists needs. The demand should be satisfied by offering the correct marketing mix and monitoring it on a regular basis by doing research.

2.5 IMPORTANT ASPECTS IN FORMULATING A MARKETING STRATEGY

The process of developing a marketing strategy was discussed in 2.4. The important aspects that are necessary to formulate the marketing strategy for Dutch tourists to South Africa that will be used for the purpose of this study will be given in Table 2.8. These aspects form the bases of the questions that are going to be asked in the questionnaire and the information that is needed of the Dutch market.

Table 2.8: Elements of a marketing strategy

STEPS TO FOLLOW IN THE MARKETING STRATEGY	QUESTIONS THAT MUST BE ASKED IN THE QUESTIONNAIRE
STEP1: Strategic analysis	
➢ Analysing the industry and market	-How many Dutch tourists visited South Africa each year?(market growth or decline)
➢ Product and competitor analysis	-What does South Africa have to offer? -What new products can South Africa offer? -What are the top tourism destinations of Dutch citizens?
STEP 2: Define the target market	
➢ Geographic segment	-In which town and region do Dutch tourists live?
➢ Demographic segment	-What are Dutch tourists age, marital status gender, income, number of dependent children and occupation? -How big are Dutch tourists' travelling groups? -How much do Dutch tourists spend in South Africa?
➢ Behaviour segmentation	-What are Dutch tourists reasons for visiting South Africa? -Were Dutch tourists expectations met in South Africa? -How many times did Dutch tourists visit South Africa? -What is the length of stay of Dutch tourists in South Africa?

	-When did Dutch tourists visit South Africa? -Will Dutch tourists return to South Africa? -What are the reasons that Dutch tourists do not visit South Africa?
STEP 3: Develop marketing mix	
a) Product plan	
➢ Needs of tourists?	-What would Dutch tourists like to see in South Africa?
➢ Who is the existing market?	-Profile of the existing Dutch market (area, income, age group)
b) Distribution/Place plan	
➢ Which advertising channel will reach target market?	-What method of reservation do Dutch tourists prefer? -What influences Dutch tourists' decision to visit a specific destination? -Where did Dutch tourists hear of South Africa?
c) Price plan	
➢ Price objectives	-What is the average spending per Dutch tourist per day and total spending?
➢ Sensitivity to price?	-Do prices have a big influence in the reason for visiting?
d) Communication/Promotion plan	
➢ What is the communication / promotion mixture?	-What kind of marketing methods should South Africa use to market the destination? -Which newspapers and magazines do Dutch tourists read? what radio stations do Dutch tourists listen to? what type of TV programmes do Dutch tourists watch? Usage of e-mail?
STEP 4: Formulating strategies for specific market situations	
	-Is a strategy necessary for a new market? -Is a strategy necessary for a growing market? -Is a strategy necessary for a mature or declining market?
STEP 5: Implementation of marketing strategy	
➢ Build relationships that lasts.	-Develop good contacts in the Netherlands
➢ Customer care	-Respond to customer needs
➢ Internal marketing	-Do the actual marketing in the Netherlands

STEP 6: Evaluation of marketing strategy	- Is the strategy suitable to tourists? -Feasibility of achievement by destination? -Is it acceptable to meet the needs/ expectations of tourists?
STEP 7: Sustainability of marketing strategy	-Is there enough knowledge of the segments and product formulation (supply and demand)? -Is targets locally set for segments? -Monitor the progress by doing research.

2.6 CONCLUSION

A marketing strategy does not always require change. A perfectly acceptable strategy in some circumstances could be no change, but every strategist should guard against complacency as past success can be a real barrier to much needed future change. A good strategic thinker should be able to review what an organisation is able to do by taking a dispassionate and objective view of the competencies and capabilities that it possesses. As a result it might be possible to define existing operations in a completely new way (Adcock, 2000: 300).

Competitive tourism strategies are becoming critically important for developing destinations because tourism, by its nature, is a sensitive and highly competitive industry (Wahab & Pigram, 1997:137). SA Tourism is excited and challenged about the new path that it has mapped out to ensure that they realize the ambitions for growth in tourism. SA Tourism has fundamentally changed the way they go about marketing and developing the destination as a destination, but are confident that they have the market intelligence and ability to realize the realistic targets. At the heart of South Africa's new strategy is their ambition to become: focused (scarce resources obtain the highest possible benefits), customer–driven (understand what customers need), strategic (deals with the major issues and challenges of growth) and to become leaders in the tourism industry.

A marketing strategy should be sustainable to enable the tourism marketer to maintain a balance between demand and supply of the tourists needs. The demand should be satisfied by offering the correct marketing mix and should be monitored at a regularly basis by doing research. Causes of an unstable marketing strategy can be the following: instability of demand, elasticity of demand, seasonality of demand and competition which have to be managed in a proper way to be able to implement a sustainable marketing strategy.

This Chapter's aim was to discuss the process of developing a marketing strategy as indicated by different Marketing researchers (Assael, 1993; Saayman, 2001b; Foster, 1985; Mill & Morrison, 1985; Du Plessis *et al*, 2001; Walker *et al*, 1992 and Doole & Lowe, 2001).

At the end of the chapter in 2.5 important elements of a marketing strategy were identified. The marketing strategy process consists of the following 7 steps:

Step 1: Strategic analysis

Step 2: Define the target market

Step 3: Develop a marketing mix

Step 4: Formulating marketing strategies

Step 5: Implementation of marketing strategy

Step 6: Evaluation of marketing strategy

Step 7: Sustainability of marketing strategy

The important elements of the marketing strategy will serve as an indication of the information that will be needed of the Dutch tourists and will be analysed in Chapter 3 and in Chapter 4 in the empirical research.

3 ANALYSES OF THE NETHERLANDS

> *Business success is not determined by the producer but by the customer*
> ***Peter Drucker***

To be able to learn more about the Dutch tourist their behaviour has to be observed systematically.

3.1 INTRODUCTION

The Netherlands is on the European continent and shares borders to the south with Belgium and to the east with Germany, while the North Sea lies to the north and west. Large areas of The Netherlands have been reclaimed from the sea and consequently one fifth of the destination lies below sea level. The destination is flat and level and is criss-crossed by rivers and canals (Anon, 2003a).

Holland is the name commonly given to the destination, although it really applies to only two of the constituent provinces, albeit the most important historically. The Netherlands was once a major colonial power and overseas trade remains vital to the economy (Boniface & Cooper, 1987: 80).

The Netherlands today has dispelled all images of it being an archaic land of clogs and windmills, with its string of exciting cities, including the cosmopolitan capital, Amsterdam –

one of Europe's great cities. Elsewhere Arnhem, Utrecht, The Hague, Eindhoven and, especially, buzzing Rotterdam all boast their own charms. Away from the cities, the idyllic land of windmills and tulips does still exist in the bucolic splendour of the destination side, as do a number of coastal towns and resorts, many fine beaches and similarly interesting heritages to the Netherlands bigger historical cities.

The Dutch citizens take more holidays abroad than in their own destination, the Netherlands is a major generator of international tourists on a world scale. The small size of the destination encourages cross-border trips (around two-thirds of all foreign trips are to neighbouring destinations) (Boniface & Cooper, 1987: 80).

As mentioned in Chapter 1 the Netherlands is South Africa's fifth biggest market and as many as 114 797 Dutch tourists visited South Africa in 2002 (SSA, 2002). The question remains why is the Netherlands a growing tourist market to South Africa?

The aim of this chapter is to do an analysis of the Netherlands by giving information on:

- Basic facts of the Netherlands,
- The people of the Netherlands,
- The government and economy of the Netherlands
- Dutch tourists' travel patterns and
- Current Dutch tourist profile to South Africa.

The above is done to get a better understanding of the Dutch tourist market to be able to offer the correct marketing mix to this specific market.

3.2 BASIC FACTS OF THE NETHERLANDS

Some basic facts of the Netherlands include:

- **Official name:** Kingdom of the Netherlands
- **Capital:** Amsterdam

- **Seat of Government** The Hague
- **Area:** 41526 square kilometres (16033 square miles)
- **Total Population** 16 200 000 (2003 estimate)
- **Population growth rate** 0.43 percent (2000 estimate)
- **Life expectancy**

Total	78.3 years (2000 estimate)
Female	81.3 years (2000 estimate)
Male	75.4 years (2000 estimate)

- **Infant mortality rate** 5 deaths per 1000 live births (2000 estimate)
- **Ethnic divisions** Dutch 96%

  Moroccan, Turkish, Indonesian, Surinamese and other (4%)

(Anon, 2001; Anon, 2003a)

- **Population density**

With about 382 persons per square kilometer (990 persons per square mile), the destination has one of the highest population densities in the world. More than 40 percent of the population lives in the two western provinces of Noord-Holland (North Holland) and Zuid-Holland (South Holland). These two provinces contain the destination's three largest cities: Amsterdam, Rotterdam, and The Hague (Anon, 2001). Also included in the Kingdom of the Netherlands are the Caribbean islands of Aruba (population 69080) and the Netherlands Antilles (209888).

- **Regions of the Netherlands**

The Netherlands have twelve regions and each region has its own capital.

Table 3.1: Population of regions

Regions	Capital of region	Population (2000 estimate)
Drenthe	Assen	469 290
Flevoland	Lelystad	316 785
Friesland	Leeuwarden	624 435
Gelderland	Arnhem	1 919 248
Groningen	Groningen	562 066
Limburg	Maastricht	1 140 645
Noord-Brabant	's-Hertogenbosch'	2 355 754
Overijssel	Zwolle	1 077 641
Utrecht	Utrecht	1 108 582
Zeeland	Middelburg	371 686
Zuid- Holland	Den Hague	3 397 343
Noord-Holland	Haarlem	2 518 327

(Anon, 2001)

The biggest region in the Netherlands is Zuid-Holland (3 397 343), second is Noord-Holland (2 518 327), and third is Noord Brabant (2 355 754).

- **Largest cities of the Netherlands**

The 1998 estimate indicated that 89 percent of the Netherlands is urban area and 11% is rural area. The largest cities in the Netherlands is indicated in Table 3.2.

Table 3.2: Largest cities in the Netherlands

Largest cities	Population (2000 estimate)
Amsterdam	731 200
Rotterdam	593 321
The Hague	440 900
Utrecht	234 323
Eindhoven	201 843
Tilburg	193 238
Groningen	172 701
Breda	160 398
Appeldoorn	153 491
Nijmegen	152 463
Enschede	149 544
Haarlem	148 772
Arnhem	138 020

Largest cities	Population (2000 estimate)
Zaanstad	135 621
's-Hertogenbosch	129 170
Almere-Buiten	142 465
Maastrict	122 087
Amersfoort	126 270
Dordrecht	119 811
Leiden	117 196

(Anon, 2001)

The largest cities in the Netherlands are Amsterdam (731 200), Rotterdam (593 321) and The Hague (440 900).

3.3 THE PEOPLE OF THE NETHERLANDS

The Dutch citizens see their destination as the most tolerant of all the destinations in Europe. Immigrants and exiles are welcome in the Netherlands (Kindersley, 1998). Other information of the people of the Netherlands includes the following:

3.3.1 Nationality and language

The population is 95 percent ethnic Dutch. Significant minorities include Indonesians, Surinamese (both Indonesia and Suriname are former Dutch colonies), and Turkish and Moroccan quest workers and their families or descendants. There are also many refugees from around the world. Most of the immigrants are well assimilated (Anon, 2001).

The official language is Dutch, a Germanic language. Frisian is also spoken in the north-eastern province of Friesland. Flemish, which is similar to Dutch, is spoken in the northern part of Belgium bordering the Netherlands. English, German, and French are commonly understood and spoken; Dutch children learn foreign languages from an early age (Anon, 2001).

3.3.2 Marital status and Family/ Household size

In the protestant north, families tend to be larger, with stronger family ties, even though many children often leave home at the age of 18 or even earlier to continue their education or to work (Anon, 2001).

3.3.3 Religion

Slightly more than one third of the people (34%) are Roman Catholic, most of whom live in the southern provinces of Noord- Brabant and Limburg. About 25% are Protestant, most of them, including the Dutch royal family, are members of the Dutch Reformed Church. Roughly 36% of the population is not affiliated or atheist, 3% are Muslim and 2% percent are other or no religion. The Netherlands, like many European destinations, is a secular country in which the role of religion has been diminishing steadily for some time (Anon, 2001).

3.3.4 Education

The literacy rate in the Netherlands is 99 percent (1995). Schooling is free and compulsory for 11 years (between the ages of 5 and 16). An optional year may be taken at the age of four. People can choose to go to Catholic, Protestant, or "non-religious schools", but the basic curriculum is the same for all schools. Primary education ends at the age of 12, at which time the student enters one of three types of secondary education. These include a four-year general secondary school; three levels of vocational education; and a six-year pre-university programme. Apprenticeships are common for students who have completed vocational or secondary school. The oldest University is in Leiden, which was founded by William of Orange in 1575 (Anon, 2001).

3.4 THE GOVERNMENT AND ECONOMY OF THE NETHERLANDS

The government and economy that is in power in the Netherlands is as follows:

3.4.1 Government

The Netherlands' government became a Constitutional monarchy on 17 February 1983. The head of state is the monarch, whose powers are largely formal and whose role is mainly ceremonial. In 1980 Queen Juliana abdicated in favor of her daughter, Beatrix . The heir to the throne is her son, Crown Prince Willem Alexander. The Netherlands has not had a male monarch since 1980. Executive authority is exercised through the prime minister, who, as head of government, presides over the council of ministers. Legislation may be proposed by the Crown (advised by a council of state) or put forward in the 150-member Second Chamber of parliament. The Second Chamber is directly elected under a system of proportional representation. The 75-member First Chamber is elected by 12 provincial councils. Representatives in both chambers are elected for four-year terms. The seat of government is in The Hague, and the voting age is 18 (Anon, 2001).

3.4.2 Economy of the Netherlands

The Netherlands has the sixth largest economy in Europe. The economy, based on private enterprise, is highly industrialized and efficient. Trade is very important: more than half of the destination's gross domestic product (GDP) consists of imports and exports, and Rotterdam is the world's busiest port. The destination produces food for export, as well as large numbers of cut flowers and bulbs-the Netherlands accounts for more than half the world's flower exports. Even so, animal husbandry is the main agricultural activity, producing meats, cheeses, and other dairy items (Anon, 2001).

Leading industries include petroleum refining, production of machinery and chemicals. And construction. Important service sectors include banking and tourism. More than 75 percent of exports go to other members of the European Union (EU). The principal exports are machinery and transport equipment, agricultural products and foodstuffs, chemicals and plastics, and fuels and raw materials. After somewhat uncertain economic policies in the 1980's, the Netherlands found itself in recession in the early 1999's. By 1994, the economy had improved, and it has continued to grow. The "polder model" is cited as the key to the recent economic growth. It has jump-started the economy and cut government spending, yet it has preserved jobs by reducing the costs of employment for owners. The currency is the guilder, also known as the gulden or florin. The exchange rate became linked to the EU single currency, or euro, on 1 January, 1999. Euro coins and notes replaced the guilder as the national currency in 2002 (Anon, 2001).

3.4.3 Income of Dutch citizens

The income of Dutch citizens according to different gender, age groups and different occupations will be indicated in Table 3.3.

Table 3.3: Employees income (Euro)

	December 1999		1999		
	Gross income per hour	Gross income per month	Gross yearly income	Savings reward	Savings income
	€		X 1000 €		
Male	16.32	2166	25.5	2.9	0.3
Female	12.64	1219	14.2	1.4	0.2
<25 years	8.11	779	8.3	0.5	0.1
25-34 years	13.43	1699	19.8	2.0	0.3
35-44 years	16.55	1988	23.5	2.7	0.4
45-54 years	18.23	2197	26.1	3.1	0.4
55 years and older	19.39	2227	26.5	3.3	0.3
Fulltime-employees	16.02	2329	27.5	3.2	0.4
Part-time employees	13.52	1076	13.1	1.2	0.2
Flexible employees	8.89	658	4.6	0.3	0.0
Agriculture, Hunting, Forestry	12.13	1443	17.2	1.5	0.2
Mineral mining	22.29	3237	38.2	5.8	0.5
Industry	15.12	2054	24.4	2.9	0.4
Public service department	19.98	2721	32.8	3.9	0.5
Building industry	15.04	2047	25.0	2.2	0.3
Repairs of Consumer articles (and goods	12.97	1439	16.8	2.0	0.2
Hotel and Restaurant keeping	10.56	940	10.9	0.7	0.1
Transport, and Communication	14.71	1991	23.7	2.5	0.3
Financial institutions	17.96	2333	27.8	5.3	0.5
Business service rendering and letting	14.82	1689	18.5	2.2	0.2

	December 1999		1999		
	Gross income per hour	Gross income per month	Gross yearly income	Savings reward	Savings income
Public management, social insurance	17.90	2314	26.7	2.9	0.5
Education	18.31	2038	24.7	2.2	0.4
Health and Welfare	14.89	1445	17.2	1.5	0.3
Culture, recreation and other service providing	14.51	1546	18.1	1.8	0.3
TOTAL	15.05	1770	20.7	2.3	0.3

(CBS, 2002b: 209)

The average gross yearly income of a full-time employee is 27 500€ and the occupation whose gross income per year is the highest is mineral mining with a salary of 38 200€. The touring packages that South Africa compile should be affordable for the Dutch tourist with an average gross year income of 27 500€.

3.5 DUTCH TOURISTS' TRAVEL PATTERNS

It is very important to know what the Dutch tourists travel patterns are, for instance what destinations do they visit the most, where do they stay, how much do they spend and what is their length of stay are just some of the aspects that will be answered in this section.

3.5.1 Travel patterns of each region

It is important to know which regions in the Netherlands travel the most to foreign destinations. If South Africa wants to prioritise its marketing efforts to a specific region this will be a good indication on which region to focus the marketing.

Table 3.4: Regions travelling statistics to foreign destinations

Region	Number of holidays to foreign destinations per year
Groningen	320 000
Friesland	340 000
Drenthe	300 000
Overijssel	720 000
Gelderland	1 480 000
Utrecht	1 000 000
Noord- Holland	1 800 000
Zuid-Holland	2 630 000
Noord-Brabant	1 760 000
Limburg	880 000
TOTAL	11 789 430

(CBS, 2002a:95)

The regions that travel the most to foreign destinations are firstly Zuid-Holland (2 630 000) followed by Noord-Holland (1 800 000) and Noord-Brabant (1 760 000).

3.5.2 Travel patterns of different age groups

The travel patterns of each age group are important for South Africa for segmenting a specific market segment.

3.5.2.1 Participation in long foreign holidays

The participation in long foreign holidays of Dutch tourists is indicated in Table 3.5.

Table 3.5: Participation in long foreign holidays

	Population	Participation in long holidays	Average long holiday per participant	Total long holidays	In foreign destination
	X 1000	%		X 1000	%
19-24 years	1060	66	1.46	1020	81
25-29 years	1030	79	1.65	1350	77
30-39 years	2480	78	1.61	3110	61

	Population	Participation in long holidays	Average long holiday per participant	Total long holidays	In foreign destination
40-49 years	2270	78	1.73	3080	61
50-64 years	2720	75	2.21	4510	61
65-74 years	1210	64	2.25	1730	47
75 years and older	780	40	1.67	520	52
TOTAL	15100	74	1.77	19840	59

(CBS, 2002a:52)

The age groups that travels the most to foreign destinations (of which South Africa is one) is firstly the age group 19-24 years (81%), secondly 25-29 years (77%), thirdly 30-64 years (61%).

3.5.2.2 Accommodation preference

The accommodation preference of different age groups when undertaken a long foreign holiday is indicated in Table 3.6.

Table 3.6: Accommodation preference of different age groups

	Hotel	Room	Summer house (second house)	Own holiday house	Caravan	Tent
19-24 years	8%	11%	6%	3%	1%	8%
25-29 years	10%	12%	7%	13%	3%	10%
30-39 years	13%	17%	20%	17%	15%	23%
40-49 years	16%	15%	17%	14%	17%	19%
50-64 years	30%	21%	16%	22%	21%	7%
65-74 years	10%	5%	5%	5%	5%	-
75 years and older	4%	1%	1%	7%	2%	-

(CBS, 2002a:84)

The age group 19-24 years accommodation preference is a- room (11%), 25-29 years- own holiday house (13%), 30-39 years- tent (23%), 40-49 years- tent (19%), 50-64 years- Hotel (30%), 65-74 years- hotel (10%) and the age group 75 years and older accommodation preference is an own holiday house. The accommodation type that is preferred the most is a tent, but the older the Dutch citizen, the more luxurious type namely a hotel is preferred.

3.5.2.3 Foreign destination preference

It is also very important to know what the different foreign destination preference is of different age groups. This will help South Africa identify the competitors for a specific age group. Table 3.7 identifies the different age groups foreign destinations of preference.

Table 3.7: Different age groups foreign destinations of preference

	Belgium	France	Spain	Austria	Switzer-land	Germany	Italy	Greece	Turkey	TOTAL
19-24 years	8%	6%	9%	6%	6%	2%	7%	14%	16%	7%
25-29 years	8%	8%	7%	10%	10%	2%	7%	10%	9%	9%
30-39 years	16%	20%	17%	16%	4%	11%	12%	14%	11%	16%
40-49 years	12%	18%	16%	15%	24%	13%	19%	14%	20%	16%
50-64 years	24%	14%	23%	27%	27%	32%	24%	28%	15%	23%
65-74 years	8%	4%	5%	5%	9%	12%	7%	7%	13%	7%
75 years and older	-	1%	3%	2%	4%	5%	1%	2%	2%	2%

(CBS, 2002a:70)

The age group 19-24 years foreign destination of preference is- Turkey (16%), 25-29 years- Austria, Switzerland and Greece (10%), 30-39 years- France (20%), 40-49 years- Switzerland (24%), 50-64 years- Germany (32%), 65-74 years- Turkey (13%) and 75 years and older destination of preference is Germany (5%).

3.5.2.4 The average spending of the different age groups

The average spending of the different age groups when undertaking a long foreign holiday is indicated in Table 3.8.

Table 3.8: Average spending of different age groups when going on a long foreign holiday

	Total	Average holiday length	Average spending per person per day
	€	Days	€
19-24 years	690	11.6	59
25-29 years	864	12.3	70
30-39 years	669	13.1	51
40-49 years	730	13.7	53
50-64 years	745	13.4	56
65 years and older	795	14.4	55
TOTAL	687	13.4	51

(CBS, 2002a:99)

The average spending per person per day of the following age groups is as follows: 19-24 years-59€ p/p/p/d, 25-29 years- 70€ p/p/p/d, 30-39 years- 51€ p/p/p/d , 40-49 years- 53€ p/p/p/d, 50-64 years- 56€ p/p/p/d and 65 years and older spend 55 € per person per day .

3.5.3 Travel patterns of different net income groups

As mentioned earlier the income of a person determines the money that is available to spend on holidays.

3.5.3.1 Participation in long foreign holidays

The net income groups that participates the most in long foreign holidays is indicated in Table 3.9.

Table 3.9: Participation in long holidays and number of holidays undertaken by different net income groups of the population

	Population	Average long holiday per participant	Total long holidays	In foreign destination
	X 1000		X 1000	%
Smaller than 12800 euro	1810	1.64	1580	57%

	Population	Average long holiday per participant	Total long holidays	In foreign destination
12800-15500 €	1620	1.66	1670	49%
15500-18200 €	1930	1.61	2120	58%
18200-20900 €	1760	1.75	2290	55%
20900-23600 €	1890	1.82	2590	50%
23600-27200 €	2110	1.71	2910	60%
27200-32600 €	1930	1.81	3060	61%
32600 € +	2060	2.02	3620	74%
TOTAL	15100	1.77	19840	59%

(CBS, 2002a:52)

The net income groups that participates the most in long holidays to a foreign destination are the income group of 32 600€ + (74%), followed by the net income group of 27 200 – 32 600€ (61%) and thirdly the net income group of 23600-27200€ (60%). This can be due to the fact that more money is available to undertake a foreign holiday.

3.5.3.2 Average spending of different net income groups

The average spending of different income groups when going on a long foreign holiday is indicated in Table 3.10.

Table 3.10: Average spending of different income groups when going on a long foreign holiday

Net annual income	Total	Average holiday length	Average spending per person per day
		Days	**Euro**
Smaller than 12800€	647	12.5	52
12800-15500 €	669	12.4	54
15500-18200 €	677	12.7	53
18200-20900 €	657	13.3	49
20900-23600 €	725	14.1	51
23600-27200 €	646	13.6	48
27200-32600 €	680	13.9	49
32600 € +	737	13.6	54
TOTAL	687	13.4	51

(CBS, 2002a:99)

The average spending per person per day of the net income group that spends the most when going on a foreign holiday is the net income group of 32600€ + (54€ p/p/p/d) and this groups stays for 13.6 days. This is also the group that undertakes the most foreign holidays (see Table 3.9).

3.5.4 Transportation modes when undertaking a long foreign holiday

The transportation modes that is use when undertaking a long foreign holiday is indicated in Table 3.11.

Table 3.11: Transportation modes when undertaking a long foreign holiday

	1997	1998	1999	2000	2001
			%		
Motor vehicle	54	52	53	53	52
Train	3	3	3	2	3
Hired motor vehicle	10	11	11	9	10
Airplane	30	31	31	33	34
Boat/ Ferry	2	1	1	1	1
Other	1	1	1	1	1
TOTAL	100	100	100	100	100

(CBS, 2002a:40)

The transportation mode that is used the most when undertaking a long foreign holiday is a motor vehicle (52%), secondly an airplane (34%) and thirdly a hired motor vehicle (10%). Dutch tourists like to travel to destinations that are easy to reach by motor vehicle.

3.5.5 Foreign destinations of Dutch tourists

According to the CBS (Centraal Bureau voor de Statistiek, 2002a) the foreign destinations of preference that Dutch tourists visited from 1997- 2001 are as follows:

Table 3.12: Foreign destinations of Dutch tourists

	1997	1998	1999	2000	2001	1997	1998	1999	2000	2001
	%					X 1000				
Belgium	6	7	6	6	6	630	770	730	720	750
Luxemburg	2	1	1	2	1	170	140	160	190	150
France	19	19	19	19	18	2020	2100	2270	2230	2170

	1997	1998	1999	2000	2001	1997	1998	1999	2000	2001
Spain	13	13	14	12	14	1400	1510	1580	1420	1610
Portugal	2	2	2	2	2	240	270	260	290	270
Austria	8	8	9	8	8	840	960	1050	900	1000
Switzerland	3	3	3	3	3	310	340	380	320	330
Great Britain (England)	5	4	3	3	2	540	430	340	350	240
Norway, Sweden, Finland	2	2	2	2	2	210	190	200	210	230
Denmark	1	2	1	1	1	150	170	170	130	140
Germany	1	10	10	11	10	1110	1110	1210	1260	1230
Italy	6	5	5	5	5	600	600	600	610	650
Greece	4	4	5	5	5	380	510	590	580	570
Hungary	1	1	2	1	1	70	120	180	120	100
Czecho-slovakia	2	2	2	2	2	190	200	200	200	280
Turkey (LH)	2	2	2	3	4	190	230	190	370	520
Tunesia (LH)	1	1	1	0	0	60	80	60	50	50
Far East (LH)	2	1	1	2	2	160	160	170	190	250
America (LH)	2	3	2	2	2	200	330	220	250	210
Caribbean Islands (LH)	1	1	1	1	1	140	130	140	100	90
Other countries	8	8	8	9	8	890	960	990	1040	950
	100	100	100	100	100	10510	11310	11700	11510	11790

* LH= Long haul destinations (further than 5 hours from the Netherlands)

(CBS, 2002a)

The foreign destinations that Dutch tourists mostly visited are firstly France, secondly, Spain and thirdly, Germany. The Dutch tourists like to travel more on the European continent to destinations that can easily be reached by motor vehicles. Long-haul foreign destinations that are further than 5 hours from the Netherlands that they visited are Turkey, the Far East and America.

3.5.6 Reservation methods for long foreign holidays

The reservation methods that are used to make reservations for a long foreign holiday are indicated in Table 3.13.

Table 3.13: Reservation methods for long foreign holidays

	1998	1999	2000	2001
Organised travel	59	61	60	60
Travel agency booking	42	45	44	43
Bank booking	6	6	5	5
Reserved at travel agent	10	10	10	12
Unorganised Travel	41	39	40	40
Logic reserved				
Hotel	3	4	4	3
Direct with owner of business	19	18	19	19
Logic not reserved				
No booking	16	13	14	12
Permanent residence, own property	4	4	4	5
TOTAL	100	100	100	100

(CBS, 2002a:44)

Most of the Dutch tourists like to go on an organised holiday and booked at a Travel Agency.

3.5.7 **Seasonality of travel of Dutch tourists**

Figure 3.1 indicates the travel patterns of Dutch tourists during the year.

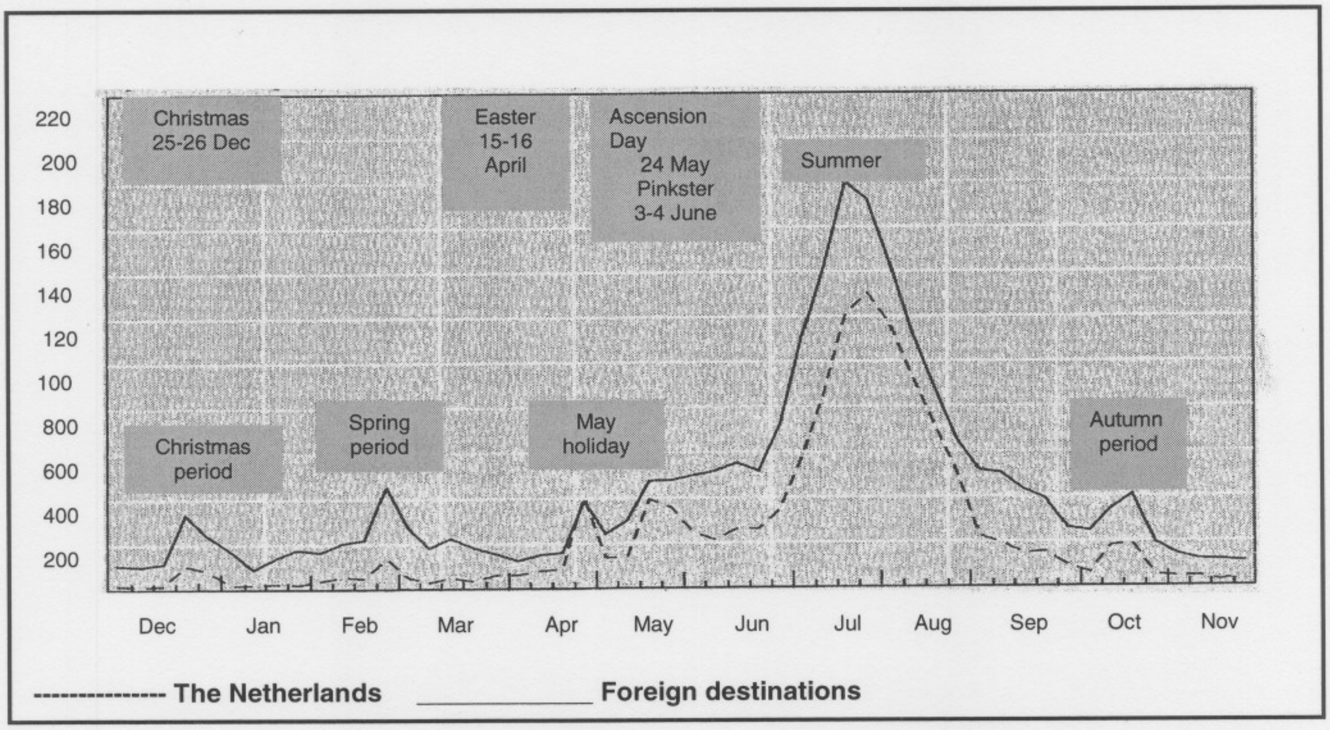

Figure 3.1: Long holidays of Dutch tourists in the Netherlands and foreign destinations (CBS, 2002a:45)

From Figure 3.1 it can be seen that during the European summer period which is during June-July, the most long foreign holidays are undertaken and during the summer holiday the travelling periods reach a maximum.

3.5.8 Main data of Dutch tourists' participation in long holidays

The participation of Dutch tourists in long holidays is indicated in Table 3.14.

Table 3.14: Main data of Dutch tourists' participation in holidays

	Unit	**Long holidays of Netherlanders**	
Destination: The Netherlands		**2000**	**2001**
Total holidays	Million	7.5	8.1
In summer period	Million	5.6	6.2
In winter period	Million	1.9	1.9
Average length of stay	Days	11.1	10.9
Amount of accommodation undertaken	Million	75.6	79.5
Expenses	Million euro	1.5	1.6
Destination: Foreign destination			
Total holidays	Million	11.5	11.8
In summer period	Million	7.8	7.9
In winter period	Million	3.7	3.9
Average length of stay	Days	13.5	13.4
Amount of accommodation undertaken	Million	144.0	146.1
Expenses	Million euro	7.8	8.1
Destination: South Africa			
Total holidays		91154	97780
In summer period		34421	56733
In winter period		56733	41047
Average length of stay		27.3 days (1997)	
Expenses		669.7 million rand (1998)	639.1 million rand (1999)

* Please note that the Summer period is from March-August and winter periods are from September-February (European seasons)

* Please note at destination: South Africa for average length of stay the statistics of 1997 and for expenses the statistics of 1998 and 1999 have been used. (Not very recent data is available)

(CBS, 2002a; SAT, 1998; Calculated from South African Tourism Sources in Saayman and Saayman, 2001)

In 2001 the Dutch tourists total holidays to foreign destinations were 11.8 million of which South Africa received 97780 (1%). They like to go more on foreign holidays in the Summer (7.9 million) but to South Africa more in the Winter periods, but 2001 was an exception and their average length of stay is 13.4 days and in South Africa 27.3 days. The expenses of Dutch tourists in foreign destinations when undertaking a long holiday is 8.1 million Euro and in South Africa in 1999 (639.1 million rand). As one can see from Table 3.14 the Dutch tourist to South Africa differs from the other foreign destinations.

3.6 CURRENT DUTCH TOURIST'S PROFILE TO SOUTH AFRICA

A survey was carried out for SATOUR during 1997. A fully representative sample of all foreign visitors leaving the destination by air from South Africa's three international airports were interviewed. This profile highlights the main facts about their travelling to South Africa and their opinions of their visit. (Please note that some is not very recent data but in other cases more recent data will be given).

3.6.1 Overview

The Dutch like to travel to the lesser known regions of South Africa, and prefer to have close contact with the population. They tend to avoid big cities. Their reasons for travelling to South Africa are climate, scenic beauty, game and the historical/cultural links. Research has shown that over half of the foreign tourists to South Africa, visit a neighbouring destination (SAT, 2002b).

3.6.2 Distribution

Approximately 45-50% of the Dutch make use of a tour operator for their bookings. The rest prefer to do all the arrangements themselves. There is no tradeshow of worth in Holland. Most Dutch tour operators conduct their business at ITB and WTM. Should you plan a sales visit to Holland, please note that the Dutch tour operators will see you by appointment only. Internet is becoming more and more important (SAT, 2002b).

3.6.3 Accessibility

KLM, 10 flights a week from Amsterdam to Johannesburg and Cape Town. Other carriers : British Airways, SAA (from Frankfurt, Zurich, London) etc. (SAT, 2002b).

3.6.4 Competitors

The competitors of South Africa for this Dutch market are: Thailand, Australia, Malaysia, South America and Indonesia (SAT, 2002b). South Africa must strive to deliver a competitive advantage above these competitors.

3.6.5 Annual/Monthly arrival of tourists from the Netherlands

The annual/monthly arrivals of Dutch tourists from 1999-2002 is indicated in Table 3.16.

By using Table 3.16 (annual /monthly arrivals of tourists from the Netherlands) the 3 months in each year with the most visitors is indicated from first, second and third most in Table 3.15.

Table 3.15: Months with the most Dutch tourists

Year	1-Most		2-Most		3-Most	
1991	Nov	2543	Dec	2159	Oct	2060
1992	Oct	2724	Feb	2268	Nov	2210
1993	Dec	2449	Oct	2431	Feb	2110
1994	Nov	3564	Dec	3279	Oct	3171
1995	Oct	7090	Nov	5710	Feb	4713
1996	Oct	8909	Nov	7050	Sept	5711
1997	Oct	11326	Nov	8579	Dec	7223
1998	Oct	12955	Nov	10734	Dec	8837
1999	Oct	13642	Nov	11640	Jan	8296
2000	Oct	13730	Nov	11424	Sept	8707
2001	Oct	13880	Nov	11828	Sept	9880
2002	Oct	17332	Nov	14202	Dec	11737

(SAT, 2002b)

The peak season of Dutch tourist arrivals to South Africa is October and November. Dutch tourists like to visit South Africa during the European winter periods to escape the cold winters. The three months with the least Dutch tourists is April, May and June. It can be a possibility to extend this market during the South African autumn-winter period. South Africa can offer special touring packages during these periods to enjoy South Africa's wildlife.

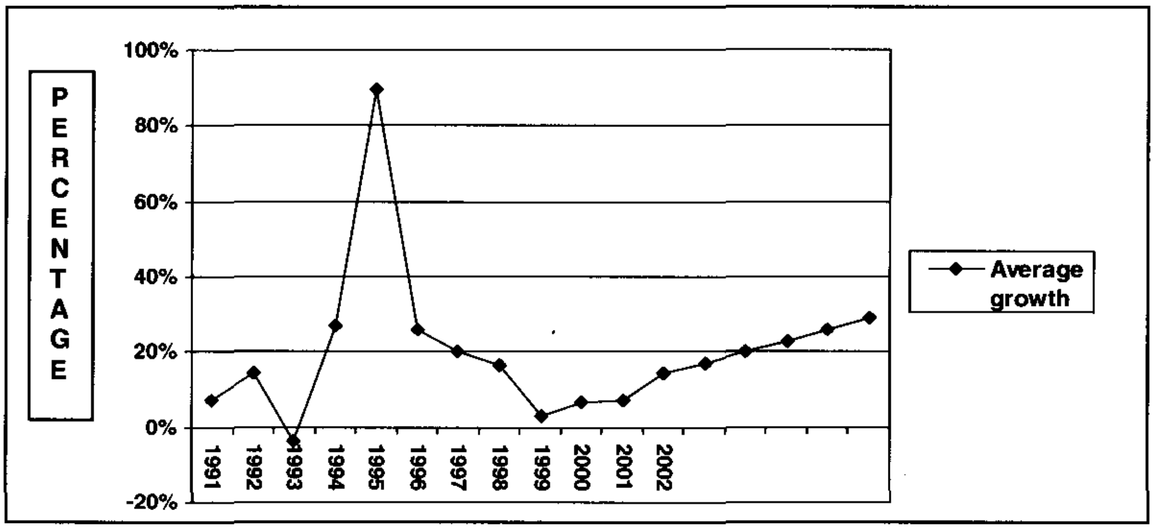

Figure 3.2: Average growth rate of Dutch tourists to South Africa (SAT, 2002b)

Figure 3.2 indicates that the Dutch market has not yet reached saturation point because there is a positive growth rate and an increase from 1999 (SAT, 2001). For a sustainable marketing strategy, South Africa should maintain an average growth rate of between 3-5%.

The percentage column in Table 3.16 indicates the increase/decrease of each year's arrival figures. The arrival figures increased every year except for 1993, it could possibly be a result of the uncertainty of the 1994 election. From 1994-1995 the increase in tourists arrivals was the highest, namely an increase of 89%. Last year (2002) South Africa had the most Dutch arrivals namely 111873 (SAT, 2001). See Table 3.16.

Table 3. 16: Annual/Monthly arrival of visitors from the Netherlands (SAT, 2001; SSA, 2002)

YEAR	JAN	FEB	MRCH	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC	TOTAL	%
1991	1279	1 776	1 328	984	727	745	1 267	1 182	1 780	2 060	2 543	2 159	17 830	7%
1992	1572	2 268	1 643	1 499	889	989	1 648	1 453	1 440	2 724	2 210	2 078	20 413	14,5%
1993	1654	2 110	1 261	1 320	1 063	944	1 730	1 300	1 351	2 431	1 965	2 449	19 578	- 4%
1994	1933	2 098	1 877	970	873	1 072	2 000	2 275	1 490	3 171	3 564	3 279	24 834	27%
1995	3 675	4 713	3 190	1 818	1 454	1 646	4 123	3 005	4 927	7 090	5 710	4 702	47 068	89,5%
1996	4 716	5 045	4 433	3 855	2 903	1 434	5 802	3 970	5 711	8 909	7 050	5 552	59 380	26%
1997	5 723	5 476	6 014	4 707	3 000	2 755	5 498	4 319	6 772	11 326	8 579	7 223	71 391	20,3%
1998	5 141	5 184	5 905	5 160	3 433	2 019	4 409	5 911	8223	12 955	10 734	8 837	83 022	16,3%

Table 3. 16: Annual/Monthly arrival of visitors from the Netherlands (SAT, 2001; SSA, 2002)

YEAR	JAN	FEB	MRCH	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC	TOTAL	%
1999	8 296	8101	6 429	4 844	3 770	3 140	5 202	5 823	8 101	13 642	11 640	6 598	85 586	3,1%
2000	6 632	8 200	7 148	5 302	3 704	3 226	7 977	7 064	8 707	13 730	11 424	8 040	91 154	6,5 %
2001	7 868	7 907	6 968	5 137	4 270	4262	9 067	7 349	9 880	13 880	11 828	9 364	97 780	7%
2002	8 162	8 940	7 412	6 361	4 534	4393	9 772	8 023	11 005	17 332	14 202	11 737	111 873	14.4%

3.6.6 Expenditure of Dutch Tourists to South Africa

It is very important to know the total expenditure of Dutch tourists who visited South Africa. This will be an indication of the different needs they want to satisfy. The expenditure of Dutch tourists will be divided into the total expenditure of Dutch tourists in South Africa and the expenditure breakdown of an average Dutch tourist to South Africa.

3.6.6.1 Total expenditure of Dutch tourists in South Africa

The total expenditure of Dutch tourists to South Africa is indicated in Table 3.17.

Table 3.17 Total expenditure of Dutch tourists in South Africa (1995-2001) (Rand millions)

Destination	1995	1996	1997	1998	1999
The Netherlands*	348.3	266.8	342.9	669.7	639.1

(Calculated from South African Tourism Sources in Saayman and Saayman, 2001)

3.6.6.2 Expenditure breakdown of an average Dutch tourist who visited South Africa

The total expenditure breakdown of an average Dutch tourist who visited South Africa is indicated in Table 3.18.

Table 3.18: Expenditure breakdown of an average Dutch tourist who visited South Africa (Rands)

Expenditure category	Spending in Rand	
	1999	**1996**
Accommodation	2390	1570
Local transport	1710	590
Food & drink	1996	1000
Recreation/ Culture & sporting activities	519	290
Shopping/ souvenirs/gifts/ curios	2599	465
Other	323	580
Total expenditure per person in SA	**9537**	**4495**

(SAT, 2002a)

Dutch tourists spent the most in 1999 on accommodation (R2390), followed by shopping/souvenirs/curios (R2599) and food and drink (R1996). The Dutch tourists spent the most on food and drinks in 1999 of all the markets that they visited in South Africa. South Africa must make sure that the needs of the Dutch tourists are met and that more quality products are supplied to increase their spending

3.6.7 Travelling profile of Dutch tourists

The travelling profile of Dutch tourists that were compiled in 1997 and 2002 are indicated in Table 3.19.

Table 3.19: Travelling profile of Dutch tourists

1997	THE NETHERLANDS	2002	THE NETHERLANDS
Rand spent per person per day (Airfares excluded)	R604		
Length of stay in SA (nights)	27.3		
First time visitors	72%		
SEGMENTATION		Geographic: Demographic: Psychographic:	Randstad Area (Amsterdam, Rotterdam, The Hague) Age Group 18 -35, 45 –70 ABC Income (A=Upper middle class B=Middle class, C1= Lower middle class) Fly-Drives, Eco-Tourism, Special Interest
MOTIVATIONS			
Main purpose of visit: -Holiday -Business/ conference -Visiting friends/ family	 62% 15% 16%	 -Holiday -Business -Visiting friends/family -Other	 58% 18% 20% 4%

REASONS FOR VISIT		-Scenic Beauty -Game Reserves -Culture -Food & Wine -Historical links -Shopping	
Prime attraction: (before visit)	Scenery		
Like most about South Africa: (after visit)	Scenery/ wildlife		
Disappointments	Crime Service		
Vulnerability of market		-Safety of tourists -increased costs of ground arrangements	
Visit "very enjoyable"	62%		
Will definitely recommend South Africa	72%		
Will definitely visit South Africa again	49%		
TRAVEL ARRANGEMENTS			
Influences on decision: Word-of-mouth or experience Promotional efforts	 79% 43%		
Decision made prior to visit	21 weeks		
WHERE FOREIGN VISITORS WENT ON THIS TRIP			
Other African Destinations	55%		
Gauteng Western Cape KwaZulu Natal	77% 70% 53%		
Average number of nights spent: Johannesburg Cape Town Durban	 3.5 nights 3.3 nights 1.0 nights		
KEY TRENDS		-Increase of interest in up-market FIT's (Foreign independent travel) -B&B,	

KEY TRENDS		-Youth Travel, -Incentives, -Self-Catering -Repeaters.	
NEW MARKET OPPORTUNITIES		-Sport -Conferences & Incentives -Cultural Tours (meet the local people) -Lesser known regions	
SATISFACTION RATINGS (Max 10)			
Restaurants	8.9		
Shopping	8.7		
Hotels	8.4		
Car Hire	8.7		
Service	8.4		
Banking	7.8		
Telephone Services	8.3		
Airports	7.3		
Public transport	6.4		
Personal Safety	6.5		

(SAT, 1998; SAT, 2002b)

The most important aspects of this profile of Dutch tourists are the segmentation which indicated the market that South Africa previously focused on. This profile indicates that South African Tourism have done segmentation by using a shotgun approach by offering touring packages for a very wide age range from 18-35 and 45-70 years. No distinction is, however made of different touring packages that are offered to different markets. The Dutch tourists come from the Randstad area (Amsterdam, Rotterdam, The Hague), they have an ABC income and their touring plan should include fly-drives, eco-tourism and places of special interest. The reasons why they visited South Africa is for scenic beauty, Game Reserves, culture, food & wine, historical links and shopping. Touring packages to South Africa should always include scenic beauty and game life because they are the prime attractions of South Africa and the aspects that Dutch tourists like the most of South Africa.

3.7 CONCLUSION

The aim of Chapter 3 was to do an analysis of Dutch tourists by analysing the basic facts of the Netherlands, the people of the Netherlands, the government and economy of the Netherlands, Dutch tourists' travel patterns and the current Dutch tourist's profile to South Africa.

The main findings of the Chapter were that the arrivals of Dutch tourists to South Africa is increasing each year. In 1991 (17830) Dutch tourists visited South Africa and in 2002 (111873) Dutch tourists visited South Africa. The two Dutch age groups that travel the most to foreign destinations are the age group 19-24 years and 25-29 years. The net income group that participates the most in foreign holidays is the net income group of 32600€, of which 74% goes on foreign holidays, spend 54 € p/p/p/d and stays for 13.6 days. Destinations that Dutch tourists like to visit are France, Spain and Germany (which can easily be reached by motor vehicle). Dutch tourists like to go on an organised holiday and most of them book their holiday at a Travel Agency.

Some important aspects of the current Dutch tourist to South Africa is that most of the Dutch tourists come from the Randstad area (Amsterdam, Rotterdam, The Hague), are 18-35 years or 45-70 years old and have an ABC income and their touring plan includes fly-drives, eco-tourism and places of special interest. The reasons why they visited South Africa is for scenic beauty, Game Reserves, culture, food & wine, historical links and shopping.

In Chapter 4 an empirical research will be done which includes the elements that are necessary to form the marketing strategy for Dutch tourists to South Africa.

4 EMPIRICAL RESEARCH

> *"People don't change their behaviour unless it makes a difference for them to do so."*
> ***Fran Tarkenton***

4.1 BACKGROUND

In chapter 2 the different aspects that are necessary to develop a marketing strategy were identified by using the strategies of Assael (1993); Saayman (2001b); Foster (1985); Mill & Morrison (1985); Du Plessis *et al* (2001); Walker *et al.* (1992); Doole & Lowe (2001). A questionnaire was developed to gather the information suggested by the above-mentioned authors to (be able to) formulate a sustainable marketing strategy (see chapter 5).

The questionnaire was divided into two sections. Section A focused on the socio-demographic factors. Section B focused on the consumer profile of the Dutch and included questions such as marketing/ distribution mediums (newspapers, radio stations) that the participants use. Questions on international travel and lastly the participants' experiences of South Africa as a tourism destination.

The aim of this chapter is to discuss the results of the survey to be able to develop a sustainable marketing strategy for Dutch tourists to South Africa. The results will be used together with the analysis of the Netherlands in chapter 3 in order to develop a sustainable marketing strategy (chapter 5).

4.2 RESULTS

The questionnaire consisted of both open and closed questions in section A and B. Section A focuses on socio-demographic profile and Section B on a consumer profile. The results will be analysed in the following sections.

4.2.1 Section A: Socio-demographic profile

The socio-demographic profile indicates general information of the study population and consists of gender, age, marital status, home town and regions, occupation, gross annual income, and number of dependent children.

4.2.1.1 Gender

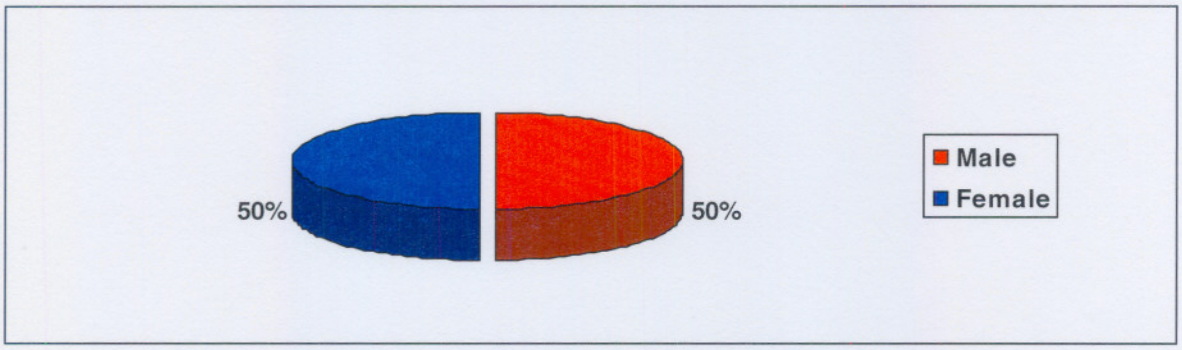

Figure 4.1: Gender

Figure 4.1 indicates that the study population is represented by 50% Males and 50% Females. According to CBS (2002b) there were 7 910 000 males and 8 077 000 females in the Netherlands in 2001. The study indicates that there is a good balance between female and males.

4.2.1.2 Age

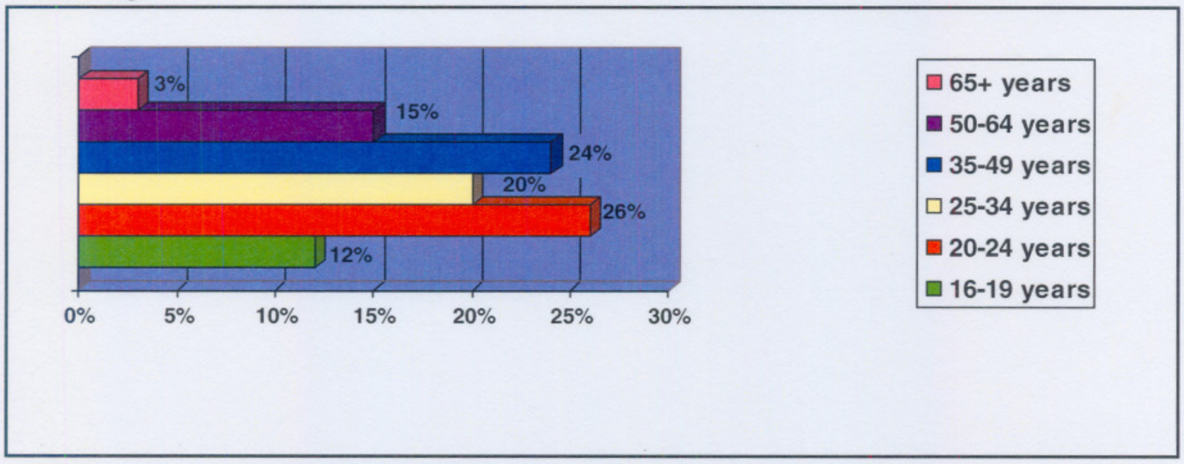

Figure 4.2: Age

Figure 4.2 indicates that the age of most of the respondents is between 20-24 years (26%) followed by 35-49 years (24%) and 25-34 years (20%).

According to CBS (2002a:52) the total population of the above-mentioned age groups were as follows 20-24 years (963 000), 35-49 years (3 806 000) and 25-34 years (2 437000). The age group that travels the most to foreign destinations is the age group 19-24 (81%), followed by 25-29 years (77%) and the age group 30-39 years in the third place (61%). The age groups 20-24, 35-49, and 25-34 years could be three possible market segments for which South Africa should develop a specific marketing strategy.

4.2.1.3 Marital status

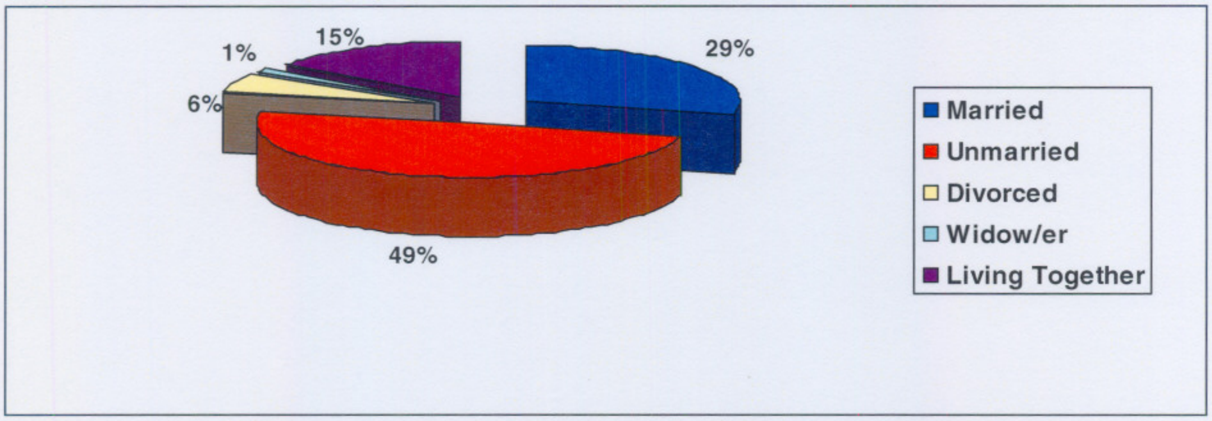

Figure 4.3: Marital status

Figure 4.3 indicates that the marital status of most of the respondents is unmarried (49%) followed by married (29%), living together (15%), divorced (6%) and widow/er (1%).

4.2.1.4 Home town and regions

This question was asked to determine in which towns and regions most of the respondents live. The respondents in the study population represent 90 different towns and the 10 towns that are mostly representative of the sample population are in bold and listed in the ranking column . The results are indicated in Table 4.1.

Table 4.1: Home town and regions

TOWN	REGION	RANKING	PERCENTAGE
Akkrum	Friesland		0.39
Amersfoort	Utrecht		0.78

TOWN	REGION	RANKING	PERCENTAGE
Amstelveen	Noord Holland		0.39
Amsterdam	**Noord Holland**	**3**	**7.78**
Apeldoorn	Gelderland		1.17
Arnhem	**Gelderland**	**8**	**2.33**
Assen	Drenthe		0.39
Baars	Overijssel		0.39
Bakkeveen	Friesland		0.39
Balk	Friesland		0.39
Beetsterzwaag	**Friesland**	**10**	**1.56**
Beilen	Drenthe		0.39
Bentelo	Drenthe		0.39
Bodegraven	Zuid Holland		0.39
Bolsward	Friesland		0.39
Breda	**Noord Brabant**	**1**	**13.23**
Capelle aan de Yssel	Zuid Holland		0.39
Dalfsen	Overijssel		0.39
Damwoude	Friesland		0.39
Den Bosch	Noord Brabant		0.78
Deventer	Gelderland		0.39
Donkerbroek	Friesland		0.39
Drachten	Friesland		1.17
Drogeham	Friesland		0.39
Eestrum	Friesland		0.39
Elsloo	Friesland		0.39
Enschede	**Overijssel**	**10**	**1.56**
Ermelo	Gelderland		0.39
Etten-Leur	Noord Brabant		0.39
Franeker	Friesland		0.78
Garderen	Gelderland		0.39
Gorredyk	Friesland		0.39
Groningen	**Groningen**	**5**	**5.45**
Grou	Friesland		0.39
Haarlem	Noord Holland		0.39
Harderwijk	Flevoland		0.39
Heerenveen	**Friesland**	**8**	**2.33**
Heerlen	Limburg		0.39
Heeze	Noord Brabant		0.39
Helmond	Noord Brabant		0.39
Hindeloopen	Friesland		0.39

TOWN	REGION	RANKING	PERCENTAGE
Hoogeveen	Drenthe		0.39
Hoogezand	Groningen		0.78
Houten	Utrecht		0.78
Houtigehage	Friesland		0.39
Hurdegaryp	Friesland		0.39
Kampen	Overijssel		0.39
Leeuwarden	**Friesland**	**2**	**9.34**
Maasland	Zuid Holland		0.39
Maastricht	Limburg		0.39
Mantgum	Friesland		0.39
Marssum	Friesland		0.39
Meppel	Drenthe		0.78
Niewlensen	Overijssel		0.39
Nijkerk	Gelderland		0.39
Nijmegan	Gelderland		0.39
Oenkerk	Friesland		0.39
Oosterwolde	Friesland		1.17
Oss	Noord Brabant		1.17
Putten	**Gelderland**	**4**	**5.84**
Rockanje	Zuid Holland		0.39
Roden	Drenthe		0.78
Roermond	Limburg		0.39
Rotterdam	**Zuid Holland**	**9**	**1.95**
Sittard	Limburg		0.39
Sneek	Friesland		1.56
Sondel	Friesland		0.39
St . Michielsgestel	Noord Brabant		0.39
St. Annaparochie	Friesland		0.39
Steenwijk	Overijssel		0.78
Stiens	Friesland		0.39
The Hague	Zuid Holland		0.39
Tilburg	**Noord Brabant**	**7**	**2.72**
Tjerkgaast	Friesland		0.39
Tolbert	Groningen		0.39
Ureterp	Friesland		0.39
Utrecht	**Utrecht**	**8**	**2.33**
Veenwouden	Friesland		0.39
Vianen	Utrecht		0.39
Vries	Friesland		0.39

TOWN	REGION	RANKING	PERCENTAGE
Wageningen	Gelderland		0.78
Wijk by Duurstede	Utrecht		0.39
Winschoten	Groningen		0.39
Wirdum	Friesland		0.39
Zeist	Utrecht		0.39
Zuidlaren	Drenthe		0.39
Zutphen	Gelderland		0.39
Zwolle	**Overijssel**	**6**	**3.89**
t Harde	Gelderland		0.78

Table 4.1 indicates that towns most represented are Breda (13%) followed by Leeuwarden (9%), Amsterdam (8%), Heerenveen (6%), Groningen (5%) and Zwolle (4%). The regions most represented in the study population are Friesland (29%) followed by Noord Brabant (18%), Gelderland (10%), Noord-Holland and Overijssel (9%) and Groningen (8%). Inhabitants from Zuid-Holland travel the most to foreign destinations (2 630 000 visits per year), secondly Noord-Holland (1 800 000 visits per year) and thirdly Noord-Brabant (1 760 000 visits per year) (See 3.5.1). The different towns/regions of a population can be helpful in determining a specific market segment.

4.2.1.5 Occupation

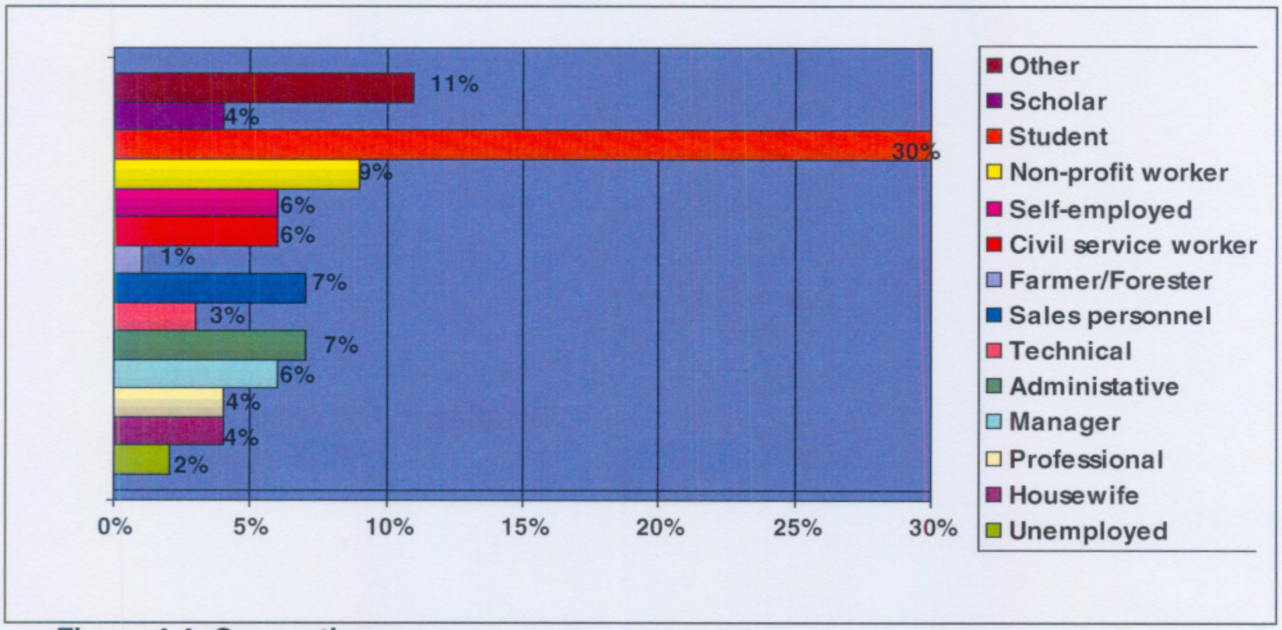

Figure 4.4: Occupation

Figure 4.4 indicates that the single largest percentage of the study population was students (30%). The other 70% is a big potential market and includes: Non-profit workers (9%), Sales and Administrative (7%) and Self-employed, Civil service worker and Managers (6%). A further 11% are Lecturers (4%), Teachers (2%), Pensioners (2%), Bankers, Military, Pilots, Machinist, Politicians, Advisers, Journalists, Security and Researchers.

According to CBS (2002b:204) the different occupations of Dutch citizens in 1999 were as follows: Technical (unskilled, 1 884 000), office administrative (1 275 000), Technical (skilled, 373 000) Medical, Pharmacy, Nursing (136 000) and other 164 000 (cf.3.2.5). The occupation of a person will determine the income of a person and availability of leisure time and the income of a person will determine the amount of money that is available for travelling.

4.2.1.6 Annual gross income (EURO)

The annual gross income of the respondents is indicated in Table 4.2.

Table 4.2: Annual gross income

CATEGORY (EURO)	PERCENTAGE
1000-15000 €	34%
15001-30000 €	26%
30001-45000 €	23%
45001-60000 €	12%
60001-75000 €	2%
75001-90000 €	1%
90001-105000 €	1%
105001-120000 €	0
120001-130000 €	1%
Total	100%

Table 4.2 indicates that most of the respondents' (34%) gross annual income is between 1000-15000 €, secondly between 15001-30000 € (26%), and thirdly between 30001-45000 € (23%).

The average gross annual income of the respondents is: 28381.04 euro per person. This is the income group that travels the second most to foreign destinations, namely 61% and each person undertakes an average of 1.81 foreign holidays each year (cf. 3.5.3.1).

According to CBS (2002a) 57% of Dutch Citizens with an income of smaller than 12800€ visited a foreign destination, 49% with an income between 12800-15500€, 58% with an income between 15500-18200€ , 55% with an income between 18200-20900€), 50% with an income between 20900-23600€), 60% with an income between 23600-27200€, 61% with an income of between 27200-32600 € and lastly 74% with an income of 32600 € + visited a foreign destination (cf. 3.5.3.1). In general the bigger the income the more spending money is available for travel and recreation although there may be exceptions (cf.3.2.4).

4.2.1.7. Number of dependent children

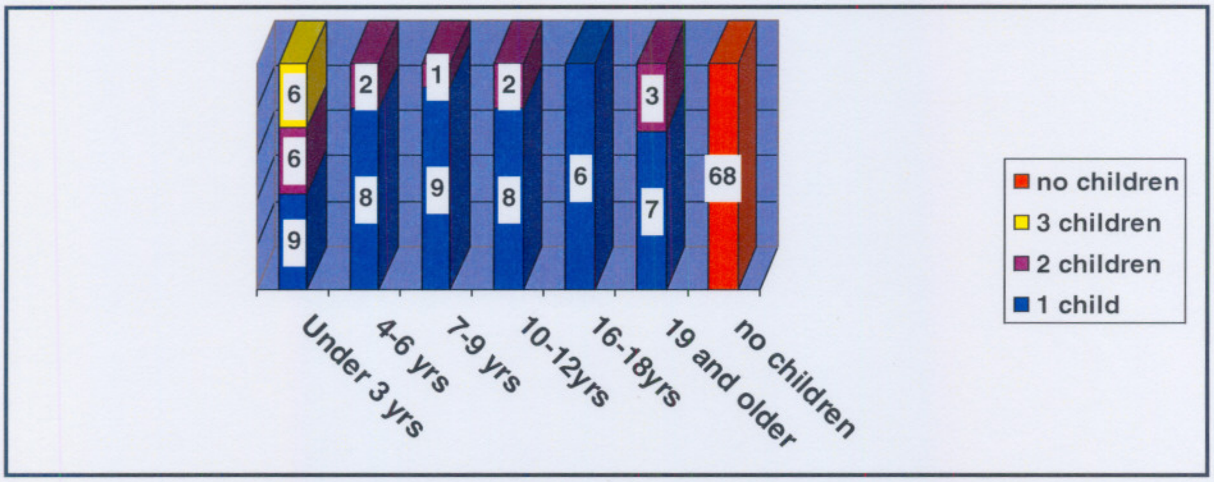

Figure 4.5: Number of dependent children

Figure 4.5 indicates that most of the respondents (68%) had no children. Dutch citizens have children in the age group under 3 years (9% one child, 6% two children, 6% three children), in the age group 4-6 years they have (8% one child, 2% two children), in the age group 7-9 years they have (9% one child, 1% two children), in the age group 10-12 years they have (8% one child, 2% two children), in the age group 16-18 years they have (7% one child, 3% two children) and in the age group 19 years and older (1% one child).

According to CBS, (2002a:52) a family with the youngest child between 0-5 years, that is 46% of respondents visited a foreign destination, a family with a youngest child of 6-12 years

(54%) visited a foreign destination and a family with a youngest child of 13-17 years (65%) visited a foreign destination. In conclusion it be stated that the older the dependent children the more a family will visit a foreign destination.

4.2.2 Section B: Consumer profile

The consumer profile indicates the behaviour and characteristics of the Dutch study population. This section was done to know what marketing channels would be applicable to Dutch citizens.

4.2.2.1 National newspapers

Table 4.3: National newspapers

NATIONAL NEWSPAPERS	PERCENTAGE
Volkskrant	26%
Algemeen Dagblad	14%
Trouw	9%
Telegraaf	21%
Nederlands Dagblad	5%
Financieel Dagblad	1%
NRC Dagblad	9%
Reformatorisch Dagblad	1%
Other	5%

*The respondents could have indicated more than one national newspaper that they read regularly

Table 4.3 indicates that the National newspapers that are read the most are Volkskrant (26%), second most Telegraaf (21%) and thirdly Nederlands Dagblad (14%). Other local newspapers represented were UN (1%) and Spits/ Metro (4%).

4.2.2.2 Regional newspapers

Table 4.4: Regional newspapers

REGIONAL NEWSPAPERS	PERCENTAGE
Dagblad van het Noorden	10%
Drentse Courant	1%
Leeuwarden Courant	23%

REGIONAL NEWSPAPERS	PERCENTAGE
Eindhovens Dagblad	2%
Noordhollands Dagblad	1%
De Gelderlander	3%
Overijssels Dagblad	1%
Het Parool	4%
De Gooi-en Eemlander	1%
Dagblad De Limburger	1%
Goudsche Courant	1%
Veluws Dagblad	5%
Friesch Dagblad	3%
Groninger Dagblad	1%
Haagsche Courant	1%
Zwolse Courant	3%
Haarlems Dagblad	1%
Brabants Dagblad	6%
Deventer Dagblad	1%
Limburgs Dagblad	1%
Apeldoornse Dagblad	2%
Nederlands Dagblad	1%
Alkmaarsche Courant	1%
Dagblad Rivierenland	1%
Amerfoortse Courant	2%
Other	9%

*The respondents could have indicated more than one Regional newspaper that they read regularly

Table 4.4 indicates that the regional newspaper that is read the most is Leeuwarden Courant (23%), secondly Dagblad van het Noorden (10%), thirdly Brabants Dagblad (6%) and fourthly Veluws (5%). Other National newspapers were 9% which includes: Utrecht Niewsblad (2%), Amsterdam Stadsblad, Echo, Drachster Courant, Rotterdam Dagblad, Twentse Courant, Tubantra (2%), Putten Courant, Lokaalblad, Loeks, Puttenaar, Barneveldse Courant, BN de Stem (2%), Herenveense Courant, Coerier, Tilburgse Courie, Enschede, Steenwijker Courant and Arnhemse Courant.

A newspaper will be a very good advertising method to get publicity, but the biggest disadvantage is the short life (people keep it for a short time and throw it away) of a newspaper. Because today's news will tomorrow be history (See Table 2.6).

4.2.2.3 Magazines

The respondents had to indicate which travel-, sport-, food and wine-, lifestyle and health magazines they read regularly.

4.2.2.3.1 Travel magazines

Table 4.5: Travel magazines

MAGAZINE	PERCENTAGE
National Geographic	13%
Reizen	8%
De Reis	1%
ANWB Kampioen	39%
Other Travel magazines De Journalist, Backpackers, Breakout, De Qoute, Eisgidsen, Festival, Groene Amsterdam, HP, Italia, Jagen, KCK-Reisen, Landscape: Noorderbreedte, Onze Wereld, Op Pad, Opzy, Vriendin, Weekend and Weetelstaden	5%

*The respondents could have indicated more than one Travel magazine that they read regularly

Table 4.5 indicates that the travel magazine that is read the most is the ANWB Kampioen (39%), secondly National Geographic (13%) and thirdly Reizen (8%).

With over 3.7 million members the ANWB is the largest association in the Netherlands. The club provides roadside breakdown assistance, security, information, convenience and enjoyment to all motorists and travellers and those enjoying leisure activities. The ANWB publishes seven magazines. The Kampioen is by far the largest monthly magazine in the Netherlands, with a circulation of more than 3.7 million. It is a club magazine of the ANWB and is provided free of charge 11 times a year to all ANWB members. The Kampioen is the largest family magazine in the Netherlands, with a readership of 5.9 million. Its articles provide reliable and practical information on recreation, tourism, traffic and transport: subjects that are of interest to a wide audience. The readership ages are from 25-64 years. Advertising rates are as follows for a single page (black and white= 2200€), (one supporting color= 4156€), (two supporting colors= 8312€) and a full color advertisement costs 14327€ (Anon, 2003b). Based on the results the ANWB Kampioen is a good magazine in which to place an advertisement of South Africa.

The National Geographic is a public magazine that is published once a month and costs 4.10€, subjects in the magazine include articles on culture, nature and tourism. The target group are both male and females (Anon, 2003b).

The holiday magazine Reizen is published 11 times a year and is aimed at a broad readership. The magazine is the biggest traveling magazine in the Netherlands and is bursting with ideas on special holidays, tips for holiday preparations and guides to various destinations. Reizen readers are in search of little-known destinations that combine unspoilt beauty with a certain degree of comfort (Anon, 2003b).

4.2.2.3.2 Sport magazines

Table 4.6: Sport magazines

MAGAZINE	PERCENTAGE
Sportweek	7%
VI	8%
Sport International	3%
Hard Gras	2%
Formule 1	3%
Golfers Magazine	0.3%
Motor	1%
Voetbal International= VI 6	6%
Voetbal magazine	2%
Nautique	0.6%
Runner's World	1%
Johan	0.3%
Voetbal	2%
Tennis Magazine	3%
Wielerrevue	0.3%
Duiken	1%
Mountainbike	2%
Atletiek	1%
Biljard Totaal	1%
De Sportwêreld	0.3%
Voetbal total	1%
Watersport magazine	1%
Paard en Sport	2%
Natural Body	1%

MAGAZINE	PERCENTAGE
Other sport magazines Auto Kampioen, Bit, De Duif EVA, Zoeklicht, Hockey, Hoefslag, Kanoblad, Mensport, REVU, Schaatssport, Ski Magazine, Swimming, Transworld BMX Zeilen	14%

*The respondents could have indicated more than one Sport magazine that they read regularly

Table 4.6 indicates that the sport magazine that is read the most is VI (8%), Sportweek (7%) and Voetbal International =VI 6 (6%).

The Sportweek is a public magazine with articles on sport and recreation. The Voetbal International is published once a week and costs 2.45€. Subjects includes International news, sport/ recreation. The target group of the Sportweek and Voetbal International are teenagers, students and men (Anon, 2003b).

4.2.2.3.3 Food and wine magazines

Table 4.7: Food and wine magazines

MAGAZINE	PERCENTAGE
TIP Culinair	6%
Allerhande	27%
SLA	2%
Alliance Gastronomique	1%
Elle etten	4%
Wining and Dining	1%
Other food and wine Food Brochures, Horeca, Misset, Lekker, Veel Vleis Veel Rys	2%

*The respondents could have indicated more than one Food and wine magazine that they read regularly

Table 4.7 indicates that the food and wine magazines that are read the most are Allerhande (27%), TIP Culinair (6%) and Elle etten (4%).

The Allerhande magazine is published once a month and consists of 120-164 pages. The magazine is free of charge at any Albert Heijn-winkels Euro. Subjects include food, trends and lifestyles. The TIP Culinair is a public magazine that is published 13 times a year and the subject is food. Elle eten is published 6 times a year and costs 4.95 €. Advertisements can be placed in the magazine. The subject is food and the target group is mostly women (Anon, 2003b).

4.2.2.3.4 Lifestyle magazines

Table 4.8: Lifestyle magazines

MAGAZINE	PERCENTAGE
101 woonideeën	6%
Ariadne at home	4%
Avant Garde	8%
Beau Monde	4%
Cosmopolitan	11%
Eigen Huis & Interieur	6%
Elegance	3%
Nouveau	3%
VT wonen	10%
Seasons	4%
VIVA	14%
Flair	11%
Elle	7%
Living	3%
Other magazines Libelle, YES, Elsevier, BLVD, Buiten, Business magazine, Charisma, Computer magazine, Donald Duck, Glossy, Groei and Bloei, Landleven, Magazines on design, Music Magazines, One, Panorama, Starstyle The economist, VISIE van de EO, Vrouen bladen	15%

*The respondents could have indicated more than one Lifestyle magazine that they read regularly

Table 4.8 indicates that the lifestyle magazines that are read the most are VIVA (14%), Flair and Cosmopolitan (11%) and VT Wonen (10%).

VIVA and Flair are public magazines that are published once a week and cost 1.70€. Advertisements can be placed in the magazine and subjects include: food, fitness, gardening, lifestyle, music and tourism. The target group is young people, students and women. Cosmopolitan is an international public magazine for women between 18 to 35 years. Advertisements can be placed in the magazine and subjects include food, fitness, lifestyle and tourism. VT Wonen is published once a month and costs 4.40€. Subjects include: home interior, culture, gardening and lifestyle and the target group is men and women (Anon, 2003b).

4.2.2.3.5 Health magazines

Table 4.9: Health Magazines

MAGAZINE	PERCENTAGE
Achmea Health	4%
Fit & Gezond Nederland	2%
Topsanté	4%
Men's Health	3%
Beter	1%
Body & mind	2%
Gezondheidsnieuws	1%
Other magazines Psychology magazine, Intermidiare, Valibladen, Verpleegkunde news	2%

*The respondents could have indicated more than one Health magazine that they read regularly

Table 4.9 indicates that the health magazines that are read the most are Achmea Health and Topsanté (4%) and Men's Health (3%).

A magazine is a better advertising medium than a newspaper. It is better because it is more socio-economic selective and it has a longer life (people keep a magazine for a longer time). Some disadvantages are that it is expensive to advertise in, and the long lead time (see Table 2.6).

4.2.2.4 Radio Stations

The respondents had to indicate what their favourite radio stations are.

Table 4.10 Radio stations

RADIO STATION	PERCENTAGE
Radio Noordzee	14%
Radio 538	44%
Radio 3FM	29%
Sky Radio	31%
Classic FM	6%
Radio 1	14%
Kink FM	6%
Radio Noord	3%
Radio 2	8%
Arrow Rock Classics	8%
Yorin FM	16%
Destination FM	2%
Radio 10 FM	3%
Radio 4	4%
Other	7%

*Respondents could have indicated more than one radio station.

Table 4.10 indicates that the favourite radio stations of the respondents are: Radio 538 (44%), Sky radio (31%) and Radio 3 FM (29%). The other radio stations that they listen to that were not listed on the survey include: ID-T, Waterstad FM, Radio Freez , Omrop Fryslan, City FM , 747 AM, BBC World, Concert zender, Hot radio, JDNT, Local- Elsloo, Love radio, ROG radio, Radio 5, Radio Amor, Radio M, Radio Putter, Radio S, Radio East, Rebecca, Regional.

The radio can also be a good advertising medium because it reaches a large audience, is geographic- and socio-economic selective and is a low cost broadcast medium. Some disadvantages are the short life of messages, listeners do not always give attention to the message and it provides only audio messages (see Table 2.6).

4.2.2.5 Favourite type of television programmes

The respondents were asked to indicate their favourite television programmes by using the following scale:

1 = Not important at all

2 = Less important

3 = Important

4 = Extremely important

Table 4.11: Favourite type of television programme

NAME OF PROGRAMME	SCALE OF IMPORTANCE Not at all Important 1	Less Important 2	Important 3	Extremely Important 4	AVERAGE
News and current affairs	1%	5%	34%	60%	**3.54**
Movies	9%	36%	36%	19%	**2.64**
Adult comedy	17%	39%	34%	10%	2.37
Sport	38%	24%	19%	19%	2.20
Drama/ mini series	37%	37%	21%	5%	1.94
Children's programmes	66%	21%	9%	4%	1.51
Family entertainment	47%	29%	18%	6%	1.83
Soap Operas	58%	20%	14%	8%	1.71
Cook / Home / Garden	48%	32%	15%	5%	1.77
Documentaries	7%	23%	49%	21%	**2.84**
Travel	14%	34%	35%	17%	2.56
Wildlife	22%	33%	29%	16%	2.39
Other Programmes Music programmes Culture programmes			0.3% 0.3%	2% 0.3%	

Table 4.11 indicates that the favourite type of television programmes of the respondents are firstly, news and current affairs (3.54- important to extremely important), secondly, documentaries (2.84- less important to important) and thirdly, movies (2.64- less important to important).

The television is a very good advertising medium because it reaches a large audience, it uses audio and video, it is highly prestigious, geographic and socio-economic selective. The disadvantages, however, are that it is expensive, the size of audience cannot be guaranteed and the amount of prime time is limited (see Table 2.6).

4.2.2.6 Usage of E-mail

This question was asked to determine how often the respondents make use of e-mail.

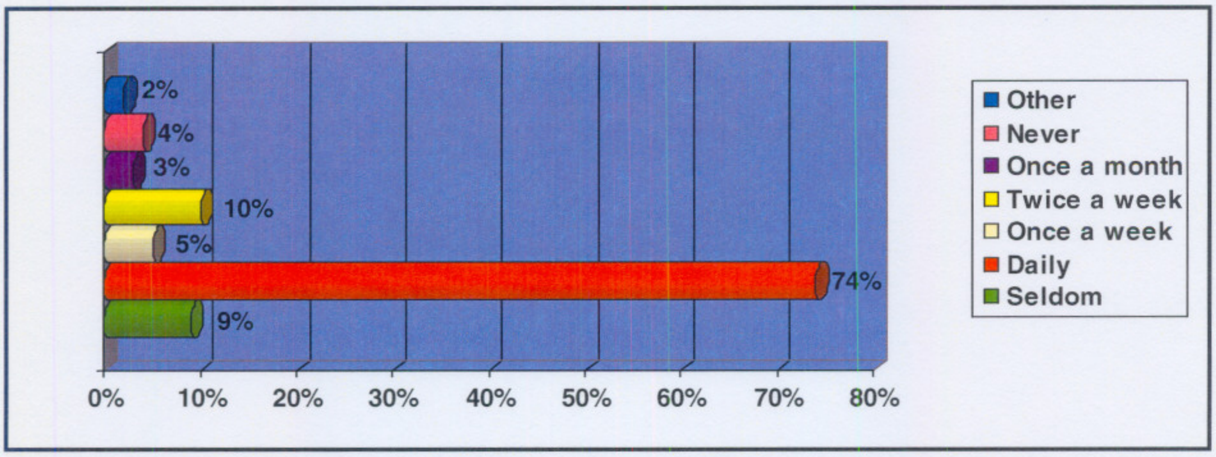

Figure 4.6: Usage of e-mail

Figure 4.6 indicates that most respondents make daily use of e-mail (74%), twice a week (10%) and 9% seldom make use of e-mail. Other usage of e-mail includes 3 times a week (1%), 4 times a week (1%). In conclusion it can be seen that most Dutch citizens make daily use of e-mail which is a modern, fast and easy type of communication which South Africa can use as promotional method to reach the target market.

4.2.2.7 Influences decision to visit a specific destination

The respondents had to rate on a scale of importance how specific variables influence their decision to visit a specific destination. The ratings on the scale were as follows:

1 = Not important at all

2 = Less important

3 = Important

4 = Very important

Table 4.12: Influences decision to visit a specific destination

	SCALE OF IMPORTANCE				
	NOT AT ALL IMPORTANT 1	**LESS IMPORTANT 2**	**IMPORTANT 3**	**EXTREMELY IMPORTANT 4**	**AVERAGE**
Radio advertisement	79%	16%	4%	1%	1.28
Television advertisement	43%	35%	16%	6%	1.84
Magazine advertisement	**29%**	**37%**	**24%**	**10%**	**2.16**
Advertisement on daily product	74%	22%	3%	1%	1.31
E-mail	64%	27%	7%	2%	1.47
Personal sales	81%	15%	3%	1%	1.23
Fax	91%	7%	1%	1%	1.11
Telephone	82%	11%	6%	1%	1.27
Internet (online)	**22%**	**19%**	**36%**	**23%**	**2.60**
Tour operator	**20%**	**17%**	**31%**	**32%**	**2.74**
Other influences Friends, Own choice, Word of mouth, Family and friends, Travel brochures, Books				23%	

Table 4.12 indicates that the biggest influence on the respondents' decision to visit a specific destination is firstly Tour operators (2.74- less important to important), secondly internet (2.60- less important to important) and thirdly magazine advertisements (2.16- less important). According to SAT (1998) 79% were influenced by word of mouth or experiences and 43% by promotional efforts to visit a specific destination (cf.3.6.7).

4.2.2.8 Travelling group

This question was asked to determine the size of the respondents' travelling group when travelling internationally.

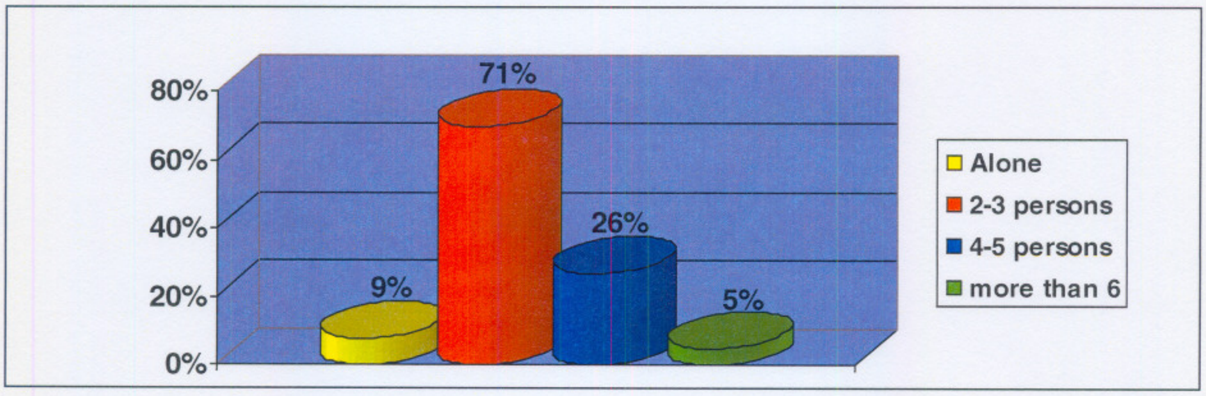

Figure 4.7: Travelling group

Figure 4.7 indicates that most of the respondents like to travel internationally in a group of 2-3 persons (71%), secondly in a group of 4-5 persons (26%) and 9% like to travel alone.

4.2.2.9 Average length of stay

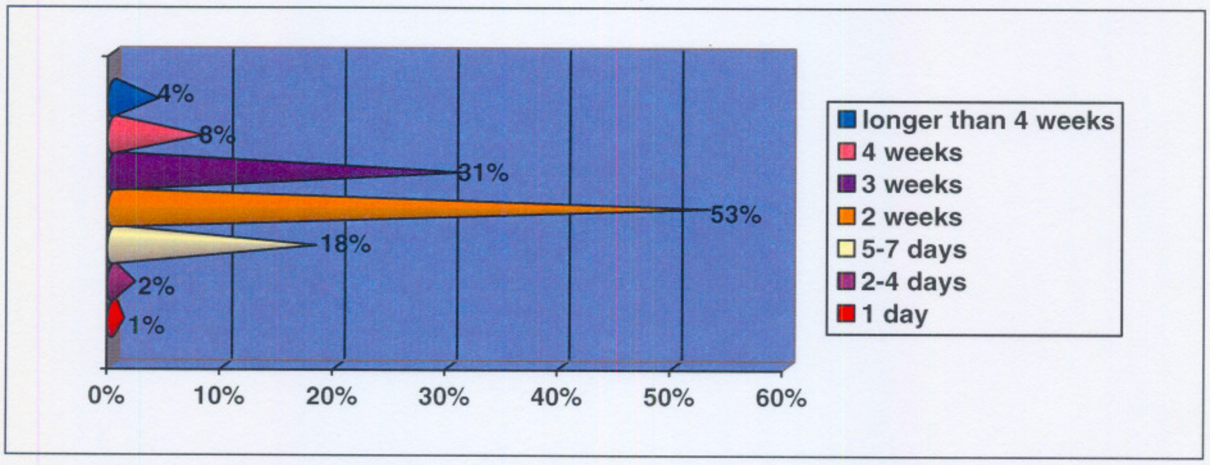

Figure 4.8: Average length of stay

Figure 4.8 indicates that most of the respondents (53%) like to stay for 2 weeks when they travel internationally, second, most like to stay 3 weeks (31%) and third, most like to stay 5-7 days (18%). The average length of stay of the study population is 16.08 nights. This average length of stay correlates with SAT (South African Tourism) 2001 and 2002 statistics.

4.2.2.10 The top 20 destinations

The respondents were asked to indicate their favourite tourism destinations or attractions. In the statistical analysis of the data the attractions were grouped together in the specific destination in which the attraction is. The top 20 destinations were identified from the data and are indicated in Table 4.13.

Table 4.13: The top 20 tourism destinations of Dutch citizens

RANKING	DESTINATION	PERCENTAGE
1	France	56.36%
2	Spain	42.51%
3	Italy	37.12%
4	America	34.63%
5	*Asia	27.91%
6	The Netherlands	24.71%
7	Greece	22.49%
8	England	21.76%
9	*South Africa & Africa	17.58%
10	Australia	14.49%
11	Austria	12.97%
12	Germany	12.59%
13	Portugal	10.61%
14	Turkey	9.53%
15	Belgium	9.26%
16	Switzerland	9.07%
17	Canada	8.55%
18	New Zealand	6.44%
19	Ireland	5.12%
20	India	1.23%

***Some respondents indicated a continent and it is also included in the list**

Table 4.13 indicates that the no.1 – no.3 tourism destinations for Dutch citizens are firstly France, Spain and Italy. South Africa & Africa are no.9 on the preference list of the Dutch citizens. From the empirical research that was done and the Report of the CBS (2002a) in Chapter 3, it can be seen that the two destinations that Dutch citizens want to visit and the two destinations that they actually visited are the same, namely France and secondly Spain.

In conclusion it can be seen that the favourite destinations and the destinations that Dutch tourists like to travel to are short-haul destinations on the European continent. If one looks at the respondents' favourite long-haul destinations (more than 5 hours from the Netherlands traveling by air) then America is their first choice, secondly Asia and thirdly, South Africa and the rest of Africa.

4.2.2.11 Visits to South Africa

This question was asked to determine how many of the respondents have visited South Africa. If the respondents visited South Africa they had to answer questions 4.2.2.12 to 4.2.2.20 & 4.2.2.23 and if they have not visited South Africa they had to answer question 4.2.2.21 to 4.2.2.23.

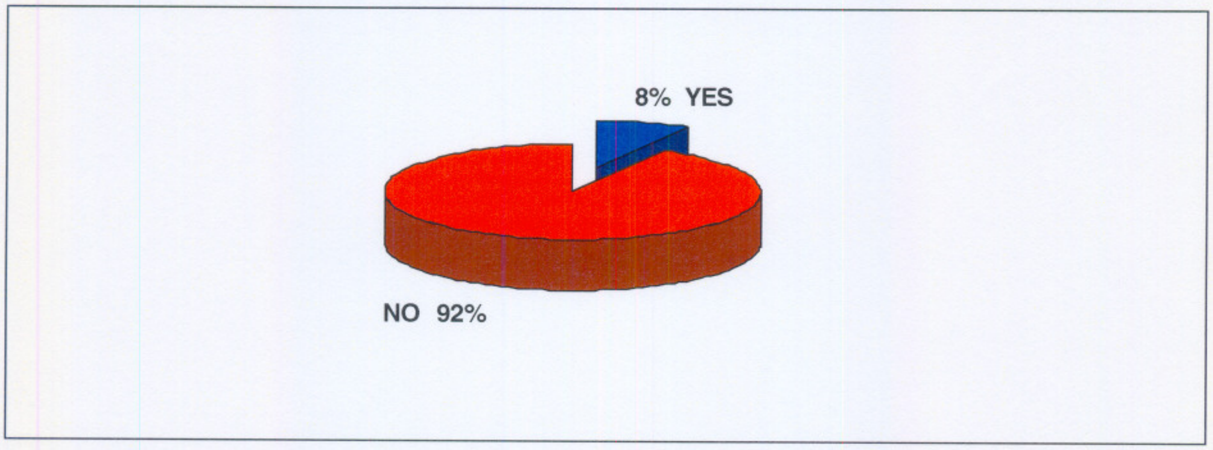

Figure 4.9: Visits to South Africa

Figure 4.9 indicates that most of the respondents (92%) have not been to South Africa and (8%) have been to South Africa. In 2001 the Dutch population was 15.1 million and 59% went on outbound holidays and only 0.64% (97780 tourists) visited South Africa (CBS, 2002a) (cf.1.1).

4.2.2.12 Where they heard of South Africa

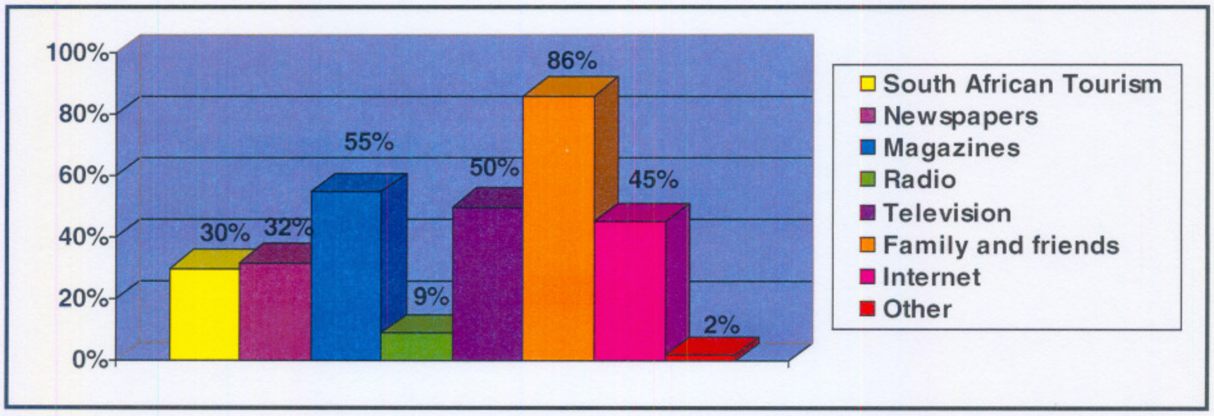

Figure 4.10: Where they heard of South Africa

Figure 4.10 indicates that most of the respondents (86%) heard of South Africa from their friends and family, secondly from magazines (55%) and thirdly (50%) from television. The other options were 2% which includes the following: they were born in South Africa, colleague, scouting, travel agent, Kwasisa Bantu Mission, medical information and as a child.

4.2.2.13 Reasons for visiting South Africa

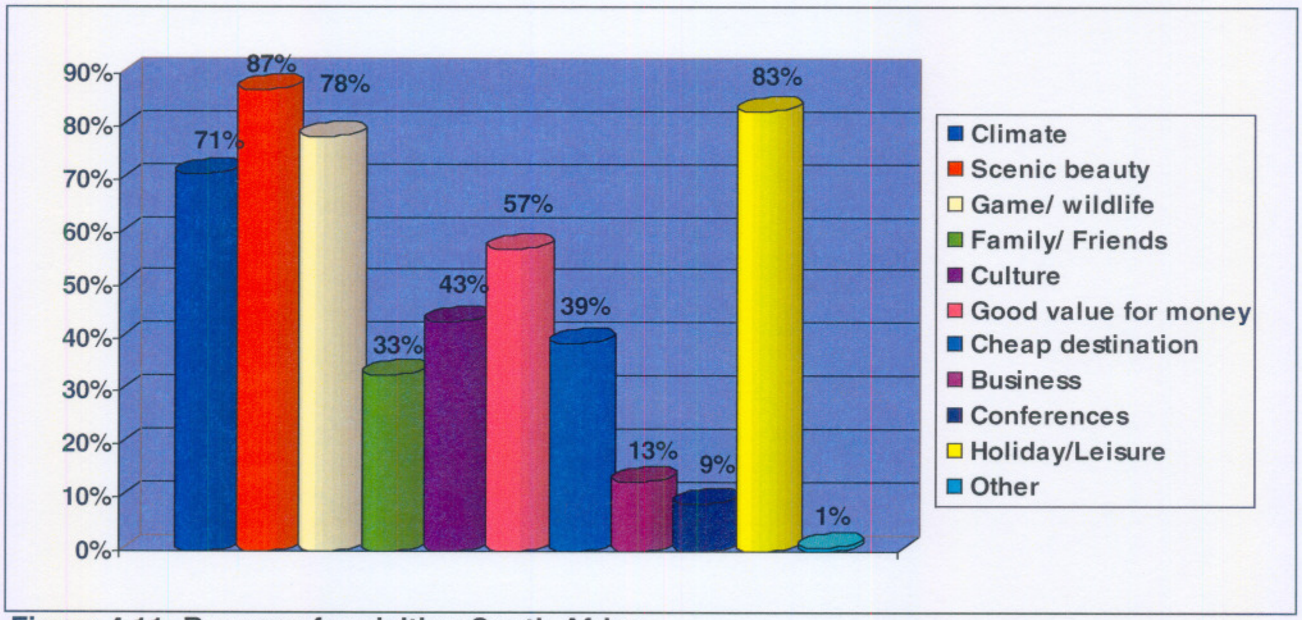

Figure 4.11: Reasons for visiting South Africa

Figure 4.11 indicates that the main reason why the respondents visited South Africa is for scenic beauty (87%), holiday/ leisure (83%), game/wildlife (78%) and for the climate (71%). Other options include Kwansisa Bantu Mission, lazer eye operation and Scouting.

According to (SAT, 2002b) the reason why Dutch citizens visited South Africa is for: scenic beauty, Game Reserves, culture, food & wine, historical links and shopping (cf. 3.6.7).

4.2.2.14 Frequency of visits to South Africa

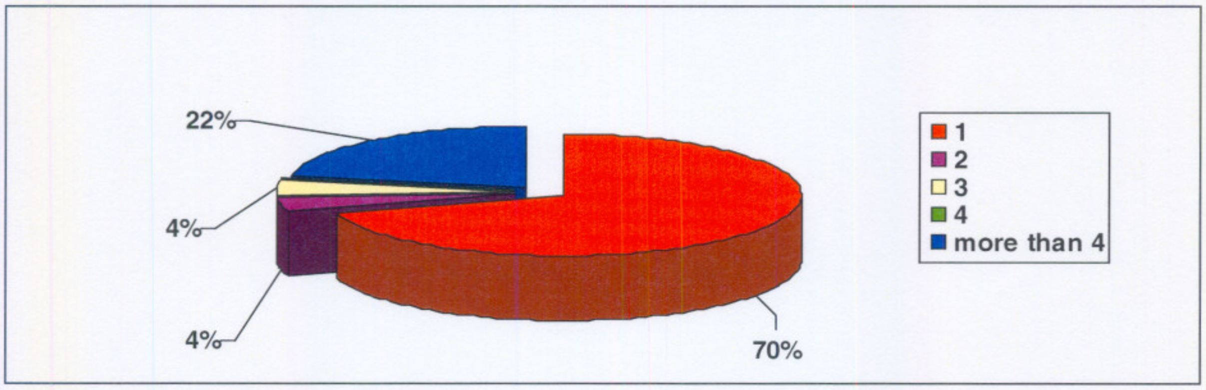

Figure 4.12: Frequency of visits to South Africa

Figure 4.12 indicates that most of the respondents who visited South Africa (70%) have been once to South Africa, secondly, (22%) visited South Africa more than 4 times and (4%) have been to South Africa 2 or 3 times. According to (SAT, 1998) for 72% of the Dutch tourists this was their first visit to South Africa which correlates with this study.

4.2.2.15 Last visit to South Africa

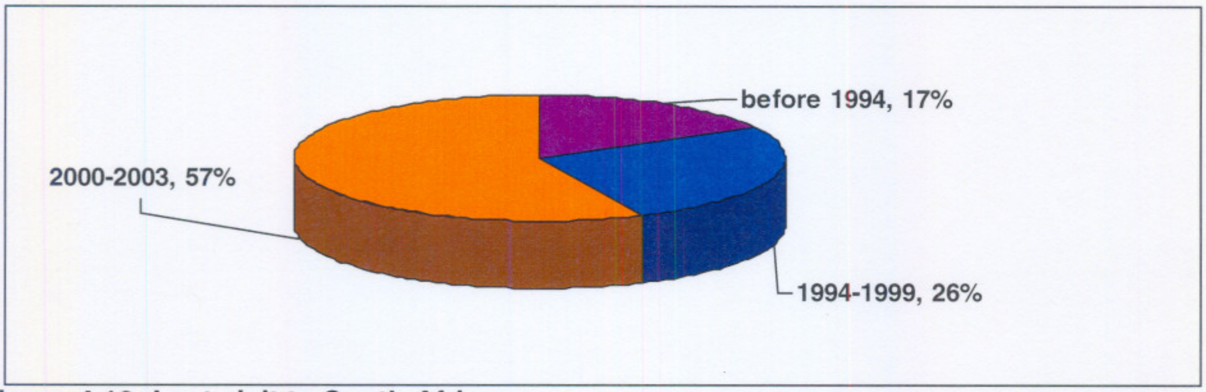

Figure 4.13: Last visit to South Africa

Figure 4.13 indicates that most of the respondents' (57%) last visit to South Africa was between 2000-2003, (26%) visited South Africa between 1994-1999 and (17%) visited South Africa before 1994.

4.2.2.16 Expectations met

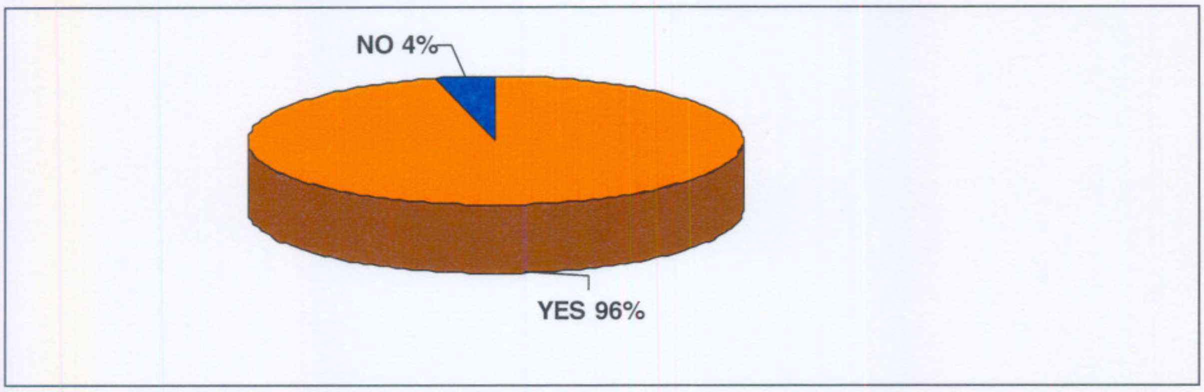

Figure 4.14: Expectations met

Figure 4.14 indicates that most of the respondents' (96%) expectations were met in South Africa and (4%) expectations were not met. Reasons why their expectations were not met is that there is too much apartheid in South Africa and that they feel unsafe. According to (SAT, 1998) 49% of Dutch citizens who visited South Africa will make a second visit to the destination, however, the disappointments that they had of South Africa were crime and safety (cf.3.6.7).

4.2.2.17 Recommend South Africa as a destination

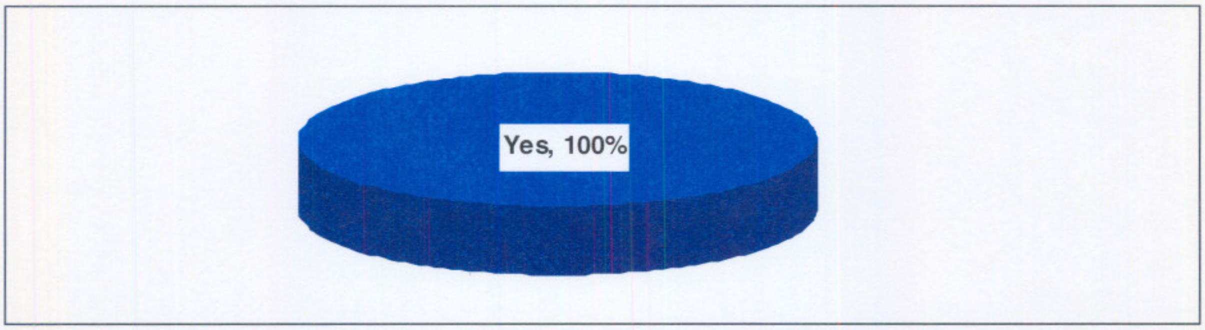

Figure 4.15: Recommend South Africa as a destination

Figure 4.15 indicates that hundred percent of the study population indicated that they would recommend South Africa to their friends and family. According to (SAT, 1998) seventy-two percent indicated that they would definitely recommend South Africa. In conclusion, Dutch tourists experienced South Africa as very favourable and once they visited South Africa they will definitely recommend the destination to their friends and family.

4.2.2.18 Motivation for recommending South Africa

Table 4.14: Motivation for recommending South Africa

Motivation why answer was Yes	Percentage
Amazing destination	7%
Beautiful destination (attractions, nature, wildlife)	39%
Good combination of Africa and luxury	7%
If you know the environment well you will have a good holiday	7%
National Parks (Kruger National Park)	13%
There is a great variety (nothing is the same)	13%
South Africa was a wonderful experience and so different than the Netherlands and the criminality of South Africa should not be a reason not to visit the destination	7%
Friendly people	7%

Table 4.14 indicates that the main motivations why they would recommend South Africa is firstly, that South Africa is a beautiful destination (39%), followed by National Parks (13%) and South Africa has a great variety (13%).

4.2.2.19 Image of South Africa

This question was asked to determine what the first thing is that comes to mind of the Dutch tourist who visited South Africa.

Table 4.15: Image of South Africa

Image	Percentage
ANC ,Mandela, politics	10%
Culture	10%
Family	5%
It is a world in one country	**15%**

Image	Percentage
Kruger National Park	**15%**
Table Mountain, Townships	5%
The Zulu	5%
Cuisine	5%
Nature and Wildlife	**25%**
Sun, wine and nice food	5%

Table 4.15 indicates that the first thing that comes to Dutch tourists' minds if thinking of South Africa is nature & wildlife (25%), followed by the image that South Africa is a world in one country (15%) and the Kruger National Park (15%). If the nature & wildlife and Kruger National Park (that also offer nature & wildlife) are clustered together it indicates that the result of the image of wildlife is 40%. In conclusion the wildlife and nature are the two main images that Dutch tourists have of South Africa.

4.2.2.20 Expenditure

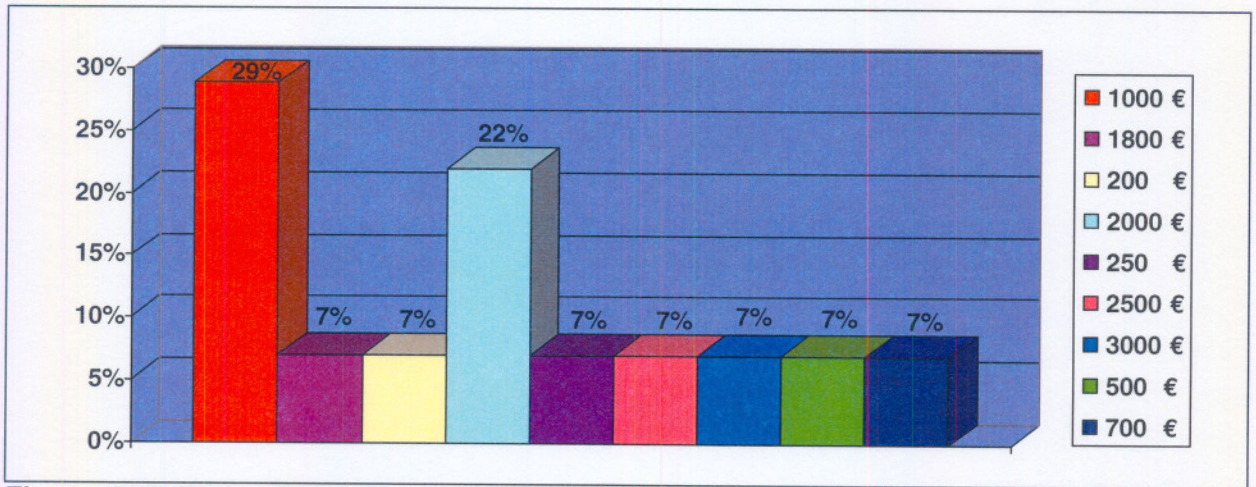

Figure 4.16: Expenditure

Figure 4.16 indicates that most of the respondents (29%) spend 1000 € and secondly (22%) spend 2000 € when visiting South Africa. The average spending of Dutch citizens that visited South Africa is: 1319.23€ (1€ = R10 = R13192.30) for the whOole period. The rand spend per person per day was:

(R13192.30 ÷ 23 (average length of stay of those that visited South Africa) = **R573.58 per person per day** (airfares excluded).

According to SAT (2001) total expenditure of a Dutch tourist to South Africa in 1999 was R7469 for the whole duration of stay (airfares excluded). It indicates that there is an increase in spending from 1999-2003. The increase in expenditure can be the result of an increase in inflation- and exchange rates.

4.2.2.21 Reasons for not visiting South Africa

The reasons for not visiting South Africa are categorised in Table 4.16.

Table 4.16: Reasons for not visiting South Africa

	SCALE OF IMPORTANCE				
REASON	**NOT AT ALL IMPORTANT 1**	**LESS IMPORTANT 2**	**IMPORTANT 3**	**VERY IMPORTANT 4**	**AVERAGE**
Not interested	67%	20%	9%	4%	1.51
Lack of knowledge	37%	32%	20%	11%	**2.06**
Finances or costs	10%	15%	32%	43%	**3.08**
Crime or safety	25%	30%	30%	15%	**2.36**
Not accessible enough	44%	34%	16%	6%	1.84
Long flight	51%	24%	16%	9%	1.84
Limited flights available	75%	21%	3%	1%	1.31
Medical or health reasons	77%	15%	5%	3%	1.33
Negative experiences of friends or family	91%	8%	1%		1.10
Weather or climate	74%	17%	6%	3%	1.39
Too busy to travel	54%	16%	16%	14%	1.91
Political reasons	64%	23%	10%	3%	1.54
Do not understand language	80%	17%	2%	1%	1.23
Not accessible for disabled persons	91%	7%	1%	1%	1.10
Children are too young to travel	84%	5%	5%	6%	1.34

REASON	SCALE OF IMPORTANCE NOT AT ALL IMPORTANT 1	LESS IMPORTANT 2	IMPORTANT 3	VERY IMPORTANT 4	AVERAGE
Other includes -Have not thought about it -Had no opportunity to travel -Visit other destinations first				 2% 1% 1%	

Table 4.16 indicates that the biggest reason why Dutch citizens did not visit South Africa is finances/ costs, (3.08-important reason) the second reason was crime and safety (2.36-less important- important reason) and thirdly a lack of knowledge (2.06-less important). This is a very important question to ask because it is an indication of what South Africa needs to do in order to attract more Dutch tourists. South Africa needs to offer more affordable touring packages, improve the destinations' crime rate and provide more information about South Africa to Dutch citizens.

4.2.2.22 What Dutch citizens would like to see in South Africa

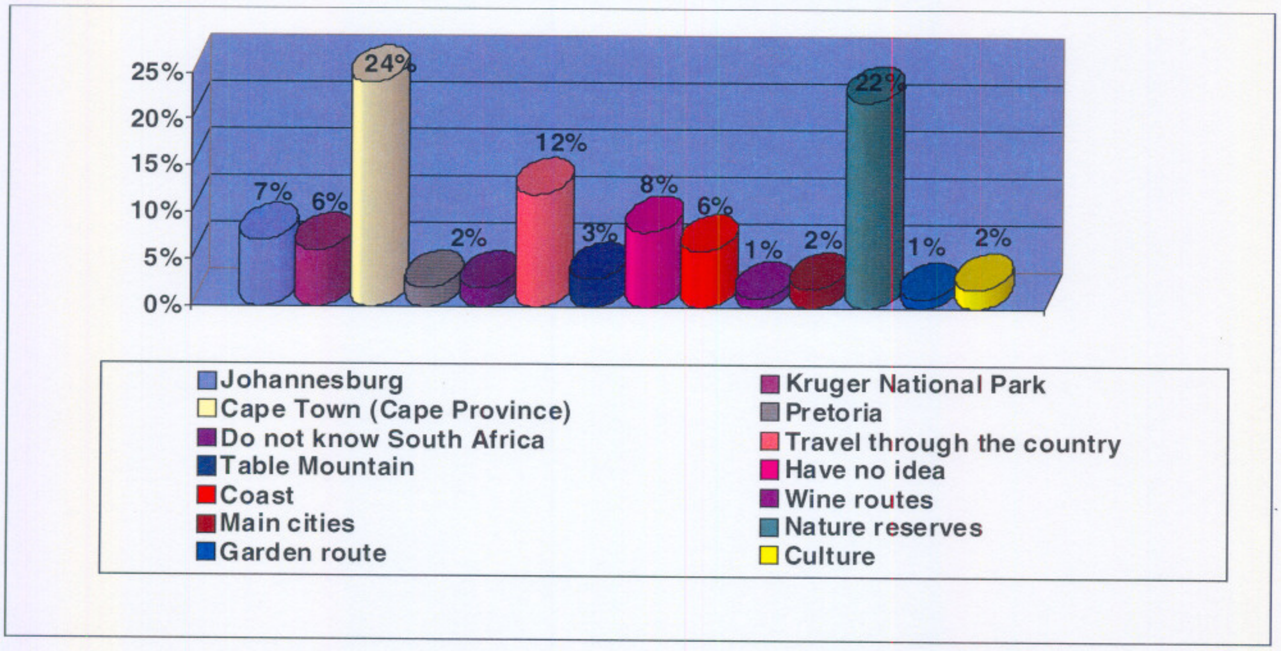

Figure 4.17: What Dutch citizens would like to see in South Africa

Figure 4.17 indicates that most of the respondents (24%) want to see Cape Town (Cape Province), (22%) would like to visit Nature reserves and (12%) want to travel through the country.

4.2.2.23 Recommendations and Suggestions of Dutch Citizens

Respondents were also asked to make recommendations and suggestions and the results were as follows:

Table 4.17: Recommendations and Suggestions

	PERCENTAGE
Marketing	46%
Finances	10%
Touring packages	7%
Positive images of South Africa	9%
Negative images of South Africa	14%
Other	14%

Table 4.17 indicates the suggestions and recommendations of Dutch citizens which were as follows: 46% suggested more marketing, 14% had other suggestions, 14% have a negative image of South Africa and 10% made suggestions regarding finances (see Annexure 2 for the complete list of suggestions and recommendations). In conclusion the negative image of South Africa should be improved by taking precautionary measures against crime. Better marketing of South Africa should be done by doing more promotion by using a variety methods, namely the television, radio stations, magazines, e-mail and internet and more affordable touring packages should be offered to the Dutch tourists.

4.3 CONCLUSION

The aim of the chapter was to reflect the results of the empirical research in order to determine the sustainable marketing strategy for Dutch tourists to South Africa. The market segment and promotion mix in this chapter were concluded from a combination of all the questions in the questionnaire. This promotion mix will enable South Africa to improve current target marketing and promotion strategies.

The main findings of this chapter are as follows: 92% of the Dutch citizens have not visited South Africa and only 8% have visited South Africa. The reasons why they did not visit South Africa are finances or costs, crime/ safety and a lack of knowledge. If the Dutch were to visit South Africa they would like to see the Cape Province, travel through the country and visit nature reserves.

The Dutch citizens that have not visited South Africa are between 20-24 years and 35-49 years which could be a possible market and the group that have visited South Africa is between 25-34 years. The promotion mix will reach the groups that have visited South Africa and have not visited South Africa and are as follows:

- National newspaper: Volkskrant and Algemeen Dagblad
- Travel magazine: ANWB Kampioen, National Geographic
- Food and wine magazine: Allerhande
- Lifestyle: VT Wonen, VIVA
- Favourite radio stations: Sky radio, Radio 538, Radio 3 FM
- Favourite television program: News and current affairs
- Influences their decision to visit a specific destination: Tour operator, Internet (online, magazine advertisement

Both the groups like to travel in a group of 2-3 persons and like to stay for a period of 2-3 weeks. The top 5 tourism destinations of Dutch citizens are (1) France (2) Spain (3) Italy (4) America (5) the Netherlands. South Africa and Africa were number 9 on their preference list of favourite tourism destinations. If one looks at the Dutch citizens' favourite long-haul destinations (further than 5 hours traveling by air from the Netherlands) then America is their first choice, secondly, Asia and thirdly, South Africa and the rest of Africa.

The 8% that have visited South Africa heard of South Africa from their friends and family, magazines and television. The reasons for visiting South Africa is scenic beauty, holiday/ leisure and game/ wildlife. Sixty nine-percent of expectations were met in South Africa and 100% indicated that they would recommend South Africa. The first things that comes to their minds if they think of South Africa is: nature and wildlife, a world in one country and the Kruger National Park. The average spending of Dutch citizens in South Africa is R13535.71.

In chapter 5, conclusions are drawn from the study and recommendations regarding the literature, empirical research and further research are made.

5 CONCLUSION AND RECOMMENDATIONS

> *It is easy to discuss sustainability. Implementation is the problem...*
> *The time has now come to 'walk the talk'.*
> ***Bramwell and Lane, 1993:4***

5.1 INTRODUCTION

The aim of the chapter is to:

- provide conclusions for the research
- make recommendations concerning the research.

In chapter 1 the overview of the research was discussed. The introduction and problem statement were stated, namely what would a sustainable marketing strategy for Dutch tourists to South Africa entail and other objectives were determined. Research methods and concepts were explained and clarified.

Chapter 2 focused on achieving objective 1. The process of marketing strategies (including sustainability) as indicated by different marketing researchers were discussed. At the end of the chapter the elements of a marketing strategy were formulated that were used for the purpose of this study. The marketing strategy process consists of the following 7 steps:

Step 1: Strategic Analysis

Step 2: Define the target market

Step 3: Develop a marketing mix

Step 4: Formulating marketing strategies

Step 5: Implementation of marketing strategy

Step 6: Evaluation of marketing strategy

Step 7: Sustainability of marketing strategy

Chapter 3 focused on achieving objective 2. An analysis of Dutch tourists was done by giving information on, the people of the Netherlands, the government and economy of the Netherlands, Dutch tourists' travel patterns and a current Dutch tourist profile to South Africa. A Netherlands' research source of CBS (Centraal Bureau voor de Statistiek) that indicated Dutch travel behaviour was mostly used.

Chapter 4 focused on achieving objective 3. The results of the empirical research were reflected in order to determine a sustainable marketing strategy for Dutch tourists to South Africa. Responses to the questionnaires were interpreted and possible success factors regarded as important, were identified. From the research various conclusions can be made regarding the research. These conclusions are subsequently presented.

5.2 CONCLUSIONS

The following conclusions regarding the research can be drawn, namely:

- Conclusions regarding the literature study.
- Conclusions regarding the survey.

The above-mentioned are concluded next.

5.2.1 Conclusions regarding the literature study

The following are regarded as the main conclusions with respect to research objective 1 (cf.1.3.2).

- A marketing strategy identifies the long-term goals and objectives of a destination (cf. 2.3).
- A marketing strategy consists of specific strategies for target markets, positioning, the marketing mix, and marketing expenditure levels (cf. 2.3).
- A good marketing strategy should be characterised by (a) a clear market definition; (b) a good match between corporate strengths and needs of the market; and (c) superior performance relative to the combination of the success factors of a business (cf. 2.3).

- As a conclusion, a marketing strategy can be seen as a strategy to satisfy the target market needs by offering a specific marketing mix and to position the market above other competitors (cf. 2.3).
- A marketing strategy should be sustainable to enable the tourism marketer to maintain a steady growth rate and maintain the balance between demand and supply of the tourists needs (cf.2.4.7).
- The demand should be satisfied by offering the correct marketing mix and should be monitored at a regular basis by doing research (cf.2.4.7).
- Causes of an unstable marketing strategy can be the following: changing trends, instability of demand, elasticity of demand, seasonality of demand and competition which have to be managed in a proper way to be able to implement a sustainable marketing strategy (cf.2.4.7).
- A marketing strategy process consists of the following steps: (cf.2.4)

Step 1: Strategic Analysis (SWOT analysis, analysing the industry and market, product and competitor analysis).

Step 2: Define the target market (bases for segmenting, the market, requirements for effective segmentation, target marketing strategies, market positioning).

Step 3: Develop a marketing mix (product plan, distribution/place plan, price plan, communication/promotion plan).

Step 4: Formulating marketing strategies

Step 5: Implementation of marketing strategy

Step 6: Evaluation of marketing strategy

Step 7: Sustainability of marketing strategy.

- The following marketing strategies can be used, to determine the segments to target namely undifferentiated or mass marketing, differentiated marketing, concentrated marketing and customised marketing (cf.2.4.2c).

- The following marketing strategies/ approaches can be used, namely awareness strategy, trust strategy, needs-stimulation strategy, market penetration strategy, reaction strategy, spending versus volume strategy, maintenance strategy (cf.2.4.4).
- A combination or only one of the above-mentioned marketing strategies can be used (cf.2.4.4).

The following are regarded as the main conclusions with respect to research objective 2 (cf. 1.3.2).

- The arrival of Dutch tourists to South Africa for the last three years is as follows:

  2000- 91 154 tourists (increase of 6.5% on previous year)

  2001- 97 780 tourists (increase of 7% on previous year)

  2002- 111 873 tourists (increase of 14.4% on previous year) (cf. 3.6.5).
- The total foreign holidays of Dutch tourists to foreign destinations in 2001 was 11.8 million, the average length of stay is 13.4 days and their spending for the year on foreign holidays was 8.1 million (cf. 3.5.8.)
- The two age groups of Dutch tourists that travel the most to foreign destinations are the age group 19-24 years and 25-29 years (cf.3.5.2.).
- Characteristics of the age group 19-24 years is: the average long holiday per person (1.46), length of stay (11.6 days), total spending (690€), spending per person per day (59€), accommodation preference (room), foreign destination preference is Turkey (cf. 3.5.2).
- Characteristics of the age group 25-29 years is: the average long holiday per person (1.65), length of stay (12.3 days), total spending (864€), spending per person per day (70€), accommodation preference (own holiday house), foreign destination preference is Austria, Switzerland and Greece (cf.3.5.2).
- The segmentation of the current Dutch market to South Africa is as follows:

Geographic:	Randstad Area (Amsterdam, Rotterdam, The Hague)
Demographic:	Age group18-35, 45-70, ABC Income
Psychographic:	Fly-Drives, Eco-Tourism, special interest (cf. 3.6.7).

- Key motivations for visiting South Africa are: scenic beauty, Game Reserves, culture, food & wine, historical links and shopping (cf.3.6.7).
- The competitors of South Africa are the USA, Thailand, Australia, Malaysia, South America and Indonesia (cf.3.6.7).
- The influences on Dutch decision to visit a destination is word-of-mouth and experiences (79%) and promotional efforts (43%) (cf.3.6.7).

5.2.2 Conclusions regarding the survey

The following are regarded as the main conclusions with respect to research objective 3 (cf. 1.3.2).

- Only 8% of the study population visited South Africa and 92% of the study population have not visited South Africa. See Table 5.1 for a correlation between the group that have visited South Africa and have not visited South Africa.

Table 5.1: A comparison between Dutch citizens that have visited South Africa and those who have not visited South Africa

	92% Have not visited South Africa	**8% Have visited South Africa**
Gender	Male: 51% Female: 49%	Male: 40% Female: 60%
Age	20-24years (27%) 35-49 years (24%)	25-34 years (32%)
Marital status	Unmarried (51%)	Married: (40%)
Town and region	Breda- (Noord Brabant) (13.56%) Leeuwarden- (Friesland) (9.32%) Amsterdam- (Noord Holland) (7.63%)	Amsterdam- (Noord Holland) Breda- (Noord Brabant) Putten- (Gelderland) Leeuwarden- (Friesland) 9.52%
Occupation	Students (32%)	Sales personnel (16%)
Gross annual income	26681.21 Euro	43892.06 Euro
National newspapers	Volkskrant (26%) Telegraaf (21%) Algemeen Dagblad (13%)	Volkskrant (24%) Algemeen Dagblad (20%)
Local newspapers	Leeuwarden Courant (24%)	Dagblad van het Noorden (16%)
Travel magazines	ANWB Kampioen (39%) National Geographic (12%)	ANWB Kampioen (36%) National Geographic (20%)

	92% Have not visited South Africa	8% Have visited South Africa
Sport magazines	VI (9%) Sportweek (8%)	Tennismagazine (4%)
Food and wine magazines	Allerhande (28%) TIP culinair (6%)	Allerhande (16%) Elle eten (12%)
Lifestyle magazines	VIVA (14%) Cosmopolitan (11%) VT Wonen (10%)	AvantGarde/ Eigen huis & Interieur/ VT Wonen/ Seasons/ VIVA (12%)
Health Magazines	Achmea Health/ Topsanté (4%)	Men's Health/ Beter (8%)
Usage of e-mail	Daily (74%)	Daily (80%)
Favourite radio stations	Radio 538 (45%) Sky radio (31%) Radio 3 FM (28%)	Sky radio (32%) Radio 538 / Radio 3 FM (28%)
Favourite television programmes	News and current affairs Documentaries	News and current affairs Documentaries
Influences their decision to visit a specific destination	Tour operator Internet (online) Magazine advertisement	Tour operator Magazine advertisement Internet (online)
How big is the inter-national travelling group	2-3 persons (70%)	2-3 persons (80%)
Average length of stay (inter-nationally)	2 weeks (53%) 3 weeks (31%)	2 or 3 weeks (44%)
Top 5 tourism destinations	1. France 2. Spain 3. Italy 4. America 5. The Netherlands	
Where did they hear of South Africa		friends and family (86%) magazines (55%) television (50%)
Reasons for visiting South Africa		scenic beauty (87%) holiday/ leisure (83%) game/wildlife (78%) climate (71%)
Number of times visited South Africa		one time (70%) more than 4 times (22%)
Last visit to South Africa		last visit between 2000-2003 (57%)

	92% Have not visited South Africa	**8% Have visited South Africa**
Satisfaction of expectation		96%- expectations were met reasons why expectations were not met is: apartheid and unsafe feeling
Would they recommend South Africa to their friends and family?		100% would recommend South Africa
The first thing that comes to mind if they think of South Africa is		Nature & Wildlife (25%) South Africa is a world in one country (15%) Kruger National Park (15%)
Total average spending in South Africa (excluding air tickets)		R13535.71
Reasons for not visiting South Africa	finances or costs (75%) crime or safety (45%) lack of knowledge (31%)	
What would they like to see in South Africa	Cape Province (24%) travel through the destination (12%) nature reserves (11%)	

- The biggest ***differences*** between the two groups are as follows:

Dutch people that have not visited South Africa are males between the age of 20-24 years or an older group of 35-49 years, unmarried, students, with a gross annual income of 26681.21€. Which makes this age group a potential market for South Africa. ***Dutch people that have visited South Africa*** are females between the age of 25-34 years, married, sales personnel with a gross annual income of 43892.06 Euro.

- The greatest ***similarities*** between the two groups are as follows:

Dutch people that have visited South Africa and have **not visited South Africa** is that they read the same newspapers and magazines, they use e-mail daily, watch News, current affairs and Documentaries. They are influenced by Tour operators, internet and magazine advertisements to visit a specific destination. They like to travel in a group of 2-3 persons for 2-3 weeks.

- 46% of the Dutch tourists suggested that South Africa must do more marketing.

5.3 RECOMMENDATIONS

Recommendations regarding marketing strategies and sustainability, the Netherlands as tourist market and recommendations for further research can be made:

5.3.1 Recommendations regarding marketing strategies and sustainability for the Dutch tourist market.

- A marketing strategy should indicate the direction in which all the marketing efforts are made, for instance to increase arrival figures and maintaining a sustainable growth rate of between 3-5% per year.
- A sustainable marketing strategy has to be implemented. A sustainable marketing strategy is an ongoing strategy for the future and not one big campaign. It should rather be a series of small marketing efforts that can maintain and extend the market for sustainability.
- This research suggests to always follow the following seven steps when developing a marketing campaign:

  Step 1: Strategic Analysis

  Step 2: Define the target market

  Step 3: Develop a marketing mix

  Step 4: Formulating marketing strategies

  Step 5: Implementation of marketing strategy

  Step 6: Evaluation of marketing strategy

  Step 7: Sustainability of marketing strategy

- For sustainability always monitor the Dutch tourism demand (Dutch tourists needs) and the supply (how many tourists can South Africa accommodate).

- Identify the market segment, develop a marketing mix (consisting of product plan, price plan, distribution and promotion plan) for each market segment and maintain the balance between the tourism supply and demand for sustainability.

5.3.2 Recommendations regarding the Netherlands as tourist market

The following are regarded as the main conclusions with respect to research objective 4, namely to make recommendations to South African Tourism for a new sustainable marketing strategy (cf. 1.3.2).

South Africa needs to maintain a steady growth rate of between 3-5% per year of Dutch tourists to South Africa. In order to achieve this growth rate, South Africa should implement a sustainable marketing strategy. A sustainable marketing strategy for the Dutch tourist market to South Africa will be indicated by using the following sections (a) Type of strategy (b) market segments and (c) marketing mix.

a) Type of strategy

South Africa should follow a Differentiated strategy to target the market segments. A differentiated marketing strategy is when a destination identifies more than one viable target market segment and prepares marketing mixes for each segment (cf.2.4.2.3).

b) Market segments

A cluster analysis was used to identify the segments (tourists were grouped together with similar profiles on the measured bases). This study identified three different market segments for the purpose of maintaining the current market and to exploit a new market.

Two different approaches will be used to approach the 3 market segments namely:

- A **combination of a needs-stimulation approach** and **reaction approach**. It will be called a **needs-reaction approach** and will be used for market segments **1 and 3.** This needs-reaction approach will try to satisfy the needs of the Dutch tourists and will condition the Dutch market to come and visit South Africa.
- A **needs-reaction approach** and **spending versus volume approach** will be used for segment **2.** This strategy will be called a **needs-spenders- reaction approach.** With this approach a smaller portion of the market be targeted which will have a higher spending than other markets (cf.2.4.4).

- The three market segments are as follows:

EXPLOITING THE MARKET TO MARKET SEGMENT 1 AND 2

Market segment 1: Young explorers (needs-reaction approach)

Age group 20-24 years (students)

Market segment 2: Knowledge seekers (needs-spenders-reaction approach)

Age group 35-49 years (Non-profit workers)

MAINTAINING THE CURRENT MARKET

Market segment 3: Ambitious travellers (needs-reaction approach)

Age group 25-34 years (Sales Personnel)

c) Marketing mix

A marketing mix for each segment is compiled which will form the marketing strategy to exploit the market to segment 1 and 2 and to maintain the market of segment 3.

EXPLOITING THE MARKET TO MARKET SEGMENT 1 AND 2

Market segment 1: Young explorers (needs-reaction approach)

Age group 20-24 years (students)

This market segment is very price sensitive and the marketing message should therefore be focused on the affordable touring packages to South Africa. This market should be constantly conditioned with information about South Africa so that they will develop a desire to come and visit South Africa.

Product: Affordable touring packages for students (Back-packing).

Duration: 2 weeks for a group of 2-3 persons.

Touring plan: Touring through the destination, especially big cities.

Price: Develop a budget tour because their Gross annual income is: 11 329.20 Euro / R113 292 (1Euro=R10) and offer a touring package for R3 540 + R7 000 (air ticket) = R10 540.

Place: Distribution channels are Universities, Technicons, Schools, Youth organisations, Travel Agents, SAT office in Amsterdam, Airports, Internet and Tourism information shops.

Promotion:

Improve the lack of knowledge of Dutch tourists by doing more promotion in the Netherlands by doing the following:

- Increase the number of tour operators and travel agents that offer and sell touring packages to South Africa (60% of Dutch citizens make use of organised travel). Currently only 59 Tour operators in the Netherlands offer touring packages to South Africa. Extend the number of tour operators and travel agents that offer touring packages to South Africa with 3-5% per year (sustainable growth rate). Extend the number of tour operators that offer packages to South Africa by offering Fam tours (come and visit South Africa for free) to the Netherlands tour operators and travel agents. If the tour operators and travel agents experience South Africa as very positive they will make a great effort to sell the touring packages to South Africa (cf.3.5.6). Also invite the media in the Netherlands for Fam tours, by doing this South Africa will get good publicity.

- Send an e-mail and suggest a specific touring package to this specific market segment.
- Advertising on television: Show a documentary of South Africa.

  Place an advertisement of South Africa and the touring packages in the following radio stations, magazines and newspapers:

- Radio stations: Radio 538, Sky radio, Radio 3 FM
- Travel magazines: ANWB Kampioen, National Geographic

Invite the Photographer of the - ANWB KAMPIOEN- magazine (Jurjen Drenth) to come and visit and experience South Africa to write an article on the country. This will be a much cheaper method because it is expensive to place an advertisement in this magazine.

- Food and wine magazine: Allerhande
- Lifestyle magazine: VIVA, WT Wonen
- National Newspaper: Volkskrant and Algemeen Dagblad

Information about safety in South Africa should also be given in the promotional material.

The Promotion for all three the market segments can be the same, because Dutch citizens read and listen to the same radio stations, television programmes, newspapers and magazines. Therefore, South Africa can with one marketing campaign reach all the market segments.

Market segment 2: Knowledge seekers (needs-spenders-reaction approach)

Age group 35-49 years (Non-profit workers)

The marketing efforts for this market segment should include the theme that South Africa is a world in one country. This theme will get the attention of this market because the knowledge seekers want to experience many aspects of the destination to gain better knowledge. If the correct touring package is offered to this market segment it will result in an increase in their spending.

Product: Exclusive tours

Duration: 2 weeks for a group of 2-3 persons.

Touring plan: A tour through the destination which includes many aspects of the destination (culture, nature and history).

Price:

Gross annual income: 37 806.52 Euro/ R378 065.20 (1Euro=R10) and offer a touring package for R11 815 + R7 000 (air ticket)= R18 815.

Place: Distribution channels are Travel Agents, SAT office in Amsterdam, Airports, Tourism information shops, social groups, hotels and Restaurants.

Promotion:

See market segment 1.

MAINTAINING THE CURRENT MARKET

Market segment 3: Ambitious travellers (needs-reaction approach)

Age group 25-34 years (Sales Personnel)

The marketing efforts for this market segment should remind the ambitious travellers of the wonderful time they had in South Africa. Their needs should be taken into consideration, namely, they would like to see scenic beauty and wildlife. This ambitious traveller should be conditioned to come and visit South Africa regularly.

Product: Average expensive tour

Duration: 2-3 weeks for a group of 2-3 persons

Touring plan: A tour that includes scenic beauty and wildlife

Price:Gross annual income is 43 892.06 Euro/ R438 920.60 (1Euro=R10) and offer a touring package excluded air tickets for R13 536 + R7 000 (air ticket) = R20 536.

Place:

- Stay in contact with Dutch tourists who visited South Africa by using e-mail or a newsletter, send new touring specials to the Dutch tourists.

- Hold a reunion in South Africa for Dutch tourists that have been to South Africa. The Dutch people that have previously visited South Africa like to talk about their experiences in South Africa. As the results indicated, people like to hear from their family, friends and by word of mouth of a possible tourism destination. All the people that have been to South Africa, media and Dutch citizens who have not been to South Africa are invited to this gathering. A speech can be given about the cultural linkages between South Africa and the Netherlands. People can bring their photos and discuss their experiences. The strengths and weaknesses of South Africa can be discussed and that will be a good indication for South Africa what to improve and what are the best aspects of the country. A video of South Africa can also be shown.

Promotion:

See market segment 1.

5.3.3 Recommendations regarding further research

- The research on the Dutch tourist should be done on a regular basis (perhaps every three years) to enhance sustainability and to see if there are some differences in the travel behaviour and preferences of the Dutch market.
- The same research can be done on the other main markets to South Africa namely the UK, Germany, USA and France.

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ANNEXURE 1:

QUESTIONNAIRE

Potchefstroomse Universiteit
vir Christelike Hoër Onderwys

Founding 1869
50 years of independence 2001

Potchefstroom University
for Christian Higher Education

Private bag X6001 Potchefstroom 2520
Tel (018) 299 1111 Fax (018) 299 2799
cell: 0822331411/22 (cell to cell)
http://www.puk.ac.za
School for Entrepreneurship, Marketing and
Tourism Management

Tel (+2718) 299 1401
Fax (+2718) 299 4140

11 March – 31 March 2003

Geachte Nederlandse tourist,

Ik studeer aan de Potchefstroomse Universiteit voor Christelijk Hoger Onderwijs, in Zuid-Afrika, en volg daar de Mastersopleiding Toerismemanagement. Met mijn onderzoeksproject wil ik meer te weten komen over hoe Nederlandse toeristen reizen en wat hun voorkeuren zijn. Deze enquête vormt een belangrijk onderdeel van mijn onderzoek; ik hoop dan ook dat u me wilt helpen door de vragenlijst in te vullen. Op basis van de antwoorden ga ik een degelijk marketingplan opstellen dat Zuid-Afrika moet helpen om meer Nederlandse toeristen aan te trekken.

Uw medewerking aan dit onderzoek wordt zeer op prijs gesteld; u zult er niet meer dan 10 minuten aan kwijt zijn.

Hoogachtend

Mevrouw C. Uys

A SOCIAAL-DEMOGRAFISCH PROFIEL

1. Geslacht?

1	Man	
2	Vrouw	

2. Wat is uw leeftijd?

1	16 - 19 jaar	
2	20 - 24 jaar	
3	25 - 34 jaar	
4	35 - 49 jaar	
5	50 - 64 jaar	
6	65 jaar en ouder	

3. Wat is uw burgerlijke staat?

1	Gehuwd	
2	Ongehuwd	
3	Gescheiden	
4	Weduwe/Weduwnaar	
5	Samenwonend	

4. Wat is uw woonplaats? ______________________________

5. Wat is uw beroep?

1	Werkloos	
2	Huisvrouw/-man	
3	Wetenschappelijk	
4	Manager	
5	Administratief	
6	Technisch	
7	Handel/Verkoop (rechtstreeks aan klanten)	
8	Agrarische sector en Visserij	
9	Overheid	
10	Zelfstandig ondernemer	
11	Non-profit sector	
12	Student	
13	Scholier	
	Anders, namelijk	

6. Wat is uw huidige bruto-jaarinkomen? € ....

7. Hoeveel kinderen zijn van u afhankelijk?

1	jonger dan drie jaar	
2	4 - 6 jaar	
3	7 - 9 jaar	
4	10 - 12 jaar	
5	13 - 15 jaar	
6	16 - 18 jaar	
7	19 jaar and elder	
8	geen kinderen	

B CONSUMENTENPROFIEL

8. Welke kranten leest u een of meer keer per week?

Landelijk

1	Volkskrant	
2	Algemeen Dagblad	
3	Trouw	
4	Telegraaf	
5	Nederlands Dagblad	
6	Financieel Dagblad	
7	NRC Handelsblad	
8	Reformatorisch Dagblad	
9	Nederlandse Staatcourant	
	Anders, namelijk	

Regionaal

10	Dagblad van het Noorden	
11	Leeuwarden Courant	
12	Friesch Dagblad	
13	Het Parool	
14	Dagblad De Limburger	
15	Dagblad Rivierenland	
16	Dagblad voor West-Friesland	
17	Dagblad Zaanstreek	
18	Deventer Dagblad	
19	De Dordtenaar	
20	Drentse Courant	
21	Eindhovens Dagblad	
22	De Gelderlander	
23	De Gooi- en Eemlander	
24	Goudsche Courant	
25	Groninger Dagblad	
26	Haagsche Courant	

27	Haarlems Dagblad	
28	Limburgs Dagblad	
29	Nederlands Dagblad	
30	Leids Dagblad	
31	Noordhollands Dagblad	
32	Overijssels Dagblad	
33	Provinciale Zeeuwse Courant	
34	Veluws Dagblad	
35	IJmuider Courant	
36	Zwolse Courant	
37	Brabants Dagblad	
38	Apeldoornse Courant	
39	Alkmaarsche Courant	
40	Amersfoortse Courant	
	Anders, namelijk	

9. Welke tijdschriften leest u regelmatig?

Reizen

1	National Geographic	
2	Reizen	
3	De Reis	
4	ANWB Kampioen	
	Anders, namelijk………	

Eten/Wijn

30	TIP culinair	
31	Allerhande	
32	SLA	
33	Alliance Gastronomique	
34	Elle eten	
35	Wining and Dining	
36	Wijnpers	
37	Proefschrift	
	Anders, namelijk………	

Sporten

5	Sportweek	
6	VI	
7	Sport International	
8	Hard Gras	
9	Formule 1	
10	Golfers Magazine	
11	Motor	
12	Voetbal International= VI (6)	
13	Voetbal Magazine	
14	Nautique	
15	Runner's World	
16	Johan	
17	Voetbal	
18	Tennismagazine	
19	Wielerrevue	
20	Duiken	
21	Mountainbike	
22	Atletiek	
23	Badminton Bulletin	
24	Biljard Totaal	
25	De Sportwereld	
26	Voetbal totaal	
27	Watersport Magazine	
28	Paard en Sport	
29	Natural Body	
	Anders, namelijk..........	

Lifestyle

38	101 woonideeën	
39	Alliance Gastronomique	
40	Ariadne at home	
41	AvantGarde	
42	Beau Monde	
43	Cosmopolitan	
44	Eigen Huis & Interieur	
45	Elegance	
46	Nouveau	
47	VT wonen	
48	Seasons	
49	VIVA	
50	Flair	
51	Elle	
52	Living	
53	Talkies	
	Anders, namelijk.........	

Gezondheid

54	Achmea Health	
55	Fit & Gezond Nederland	
56	Topsanté	
57	Men's Health	
58	Beter	
59	Body + mind	
60	Gezondheidsnieuws	
	Anders, namelijk..........	

10 Wat zijn uw favoriete radiozenders?

1	Radio Noordzee	
2	Radio 538	
3	Radio 3 FM	
4	Sky Radio	
5	Classic FM	
6	Radio 1	
7	Kink FM	
8	Radio Noord	
9	Radio 2	
10	Arrow Rock Classics	
11	Yorin FM	
12	Country FM	
13	Radio 10 FM	
14	Radio 4	
	Anders, namelijk.......	

11. Hoe belangrijk zijn bepaalde tv-programma's voor u?
Wilt u per categorie een van de vier cijfers aankruisen?

Heel erg belangrijk =4
Belangrijk =3
Minder belangrijk =2
Helemaal niet belangrijk =1

		1	2	3	4
1	Nieuws en actualiteiten				
2	Films				
3	Humor voor volwassenen				
4	Sport				
5	TV-drama/korte series				
6	Kinderprogramma's				
7	Ontspanning voor het hele gezin				
8	Soaps				
9	Kook-/Woon-/Tuinprogramma's e.d				
10	Documentaires				
11	Reizen				
12	Natuurprogramma's				
	Anders, namelijk				

12. Hoe vaak gebruikt u e-mail?

1	Zelden	
2	Dagelijks	
3	1 x per week	
4	2 x per week	
5	1x per maand	
6	Nooit nie	
7	Anders, namelijk	

13 Waardoor laat u zich het meest leiden als u uw vakantiebestemming kiest?
Wilt u voor elke rubriek een cijfer aankruisen?

In zeer sterke mate =4
In sterke mate =3
In mindere mate =2
Helemaal niet =1

		1	2	3	4
1	Radioreclame				
2	Televisiereclame				
3	Reclame in tijdschriften				
4	Reclame op verpakkingen				
5	E-mail				
6	Acties op straat of aan de deur				
7	Fax				
8	Telefoon				

9	Internet				
10	Reisbureau				
	Anders, namelijk				

14. Met hoeveel mensen gaat u normaliter op reis als u een buitenlandse reis maakt ?

1	alleen	
2	2-3 personen	
3	4-5 personen	
4	6 of meer	

15. Hoe lang duurt uw buitenlandse reis meestal?

1	1 dag	
2	2-4 dagen	
3	5-7 dagen	
4	2 weken	
5	3 weken	
6	4 weken	
7	langer dan 4 weken	

16. Wat zijn de vijf toeristische bestemmingen/attracties waar u het liefst heengaat?

1	
2	
3	
4	
5	

17. Bent u al eens in Zuid-Afrika geweest?

1	Ja	
2	Nee	

Is uw antwoord bij 17 ja, beantwoord dan nog: 18-25 en 28.
Is uw antwoord bij 17 nee, beantwoord dan nog: 26-28.

18. Hoe hebt u over Zuid-Afrika gehoord?

		Ja	Nee
1	Van Zuid-Afrikaanse toeristen		
2	Het Zuid-Afrikaanse verkeersbureau Satour		
3	Kranten		
4	Tijdschriften		
5	Radio		
6	Televisie		
7	Familie, vrienden		
8	Internet		
	Anders, namelijk:		

19. Waarom hebt u Zuid-Afrika bezocht?

		Ja	Nee
1	om het klimaat		
2	om het mooie landschap		
3	wildparken		
4	familie en vrienden		
5	kunst en cultuur		
6	je krijgt waar voor je geld		
7	het is goedkoop		
8	voor zaken		
9	voor conferenties		
10	sport		
11	vakantie		
	Om andere reden, namelijk:		

20. Hoe vaak hebt u Zuid-Afrika bezocht?

1 keer	
2 keer	
3 keer	
4 keer	
meer dan 4 keer	

21. Wanneer was u voor het laatst in Zuid-Afrika?

1	vóór 1994	
2	in de periode 1994 -1999	
3	in de periode 2000-2003	

22. Voldeed Zuid-Afrika aan uw verwachting?

1	Ja	
2	Nee	

Zo nee, wilt u dan aangeven waarom niet?

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23. Zou u uw vrienden en familie aanraden om naar Zuid-Afrika te gaan?

1	Ja	
2	Nee	

Wilt u uw antwoord toelichten? ______________________________

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24. Als u aan Zuid-Afrika denkt, wat schiet u dan het eerst te binnen?

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25. Hoeveel hebt u ongeveer uitgegeven in Zuid-Afrika (vliegkaartjes niet meegerekend)?

€ ....

Als u Zuid-Afrika niet bezocht hebt, wilt u dan 26-28 beantwoorden?
26.Waarom heeft u Zuid-Afrika nog niet bezocht?
Wilt u bij elke reden aankruisen hoe belangrijk die was?

Van het grootste belang = 4
Belangrijk = 3
Minder belangrijk = 2
Onbelangrijk = 1

		1	2	3	4
1	Zuid-Afrika interesseert me niet				
2	Weet er te weinig van				
3	De kosten				
4	Misdaad/veiligheid				
5	Te moeilijk om er te komen				
6	Lange vliegreis				
7	Te weinig vluchten				
8	Mijn gezondheid				
9	Vrienden/familie is het slecht bevallen				
10	Het klimaat				
11	Ik heb het te druk voor zo'n lange reis				
12	Politieke redenen				
13	Versta de taal niet				
14	Er zijn te weinig voorzieningen voor invaliden				
15	Mijn kinderen zijn nog te klein om mee te gaan				
	Andere reden, namelijk................				

27. Als u naar Zuid-Afrika zou gaan, waar zou u dan graag heen willen?

Wilt u alstublieft ook deze laatste vraag invullen

28. Hebt u misschien nog suggesties of tips?

Hartelijk dank voor uw medewerking!

ANNEXURE 2:

Complete list of Recommendations and Suggestions of Dutch citizens

Marketing (Total 46%)
Make brochures of South Africa and mail it to Dutch citizens
Do better promotion for South Africa
Differential marketing: Continental round trips, specific travellers (backpackers), nature lovers
Do advertising by providing some interesting facts of South Africa
Do promotion on radio stations
Do promotion for different holiday packages at different prices
Do promotion in different business sectors (e-mail)
Do promotion in newspapers and magazines
Advertise South Africa in magazines
Do promotion in schools and internet
Do promotion by using e-mail
Provide more information to Dutch people
Provide Dutch citizens internet sites that they can visit
Do more promotion on television (show more of the destination because the only thing they see is animals
Internet is an important medium for promotions as well as travel agents and travel programmes
Show a special programme of South Africa on the Discovery channel (let a person travel through South Africa and give his experiences)
Do promotion in buses (Grasshopper)
Finances (Total 10%)
Would really like to go but do not have enough money
Cheaper travel
It is just sad that the ticket is expensive
Make travel to South Africa more affordable
South Africa seems nice but air ticket is expensive
Try to make South Africa more attractive for people with a lower income
Touring packages (Total 7%)
Offer tour packages for young people from 18-25 years
Cheaper organised travel for people in their twenties
Possibility of backpacking
Make provision for younger people
Positive images of South Africa (Total 9%)
Have family that visited South Africa and their feedback is very positive
Will one day visit South Africa
Will visit South Africa in 2004
Fortunately apartheid is over
Negative images of South Africa (14%)
Have a negative image of South Africa as a result of crime
Believe that other African destinations have more beautiful nature than South Africa
In the Netherlands there is much negative publicity of South Africa, try to give more beautiful travel information
South Africa must have a more positive approach
South Africa must improve their security in order to attract more tourists
There is negative publicity, namely crime, racism and aids.
Do not travel alone because it is not safe
Try to stabilise your system and try to stop the immigration. Try to give everyone enough food, housing and work, then you can start to market your destination.
Image is a problem (crime, safety and apartheid)