

TARGETING THE RIGHT MARKETS FOR SOUTH AFRICAN NATIONAL PARKS

By

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Abstract

Due to shrinking budgets for conservation and an increase in the number of government and privately owned parks, it has become very important for South African National Parks (SANParks) to target the right markets. The reason for this is that park management and marketers need to focus their efforts to optimise their limited resources. This can only be done once there is a clear understanding of who the market is, where they come from and what are their reasons for visiting the park. The literature study clearly showed that market segmentation is essential for the effective marketing of a tourism product or destination. Market segmentation is also important to sustain the current market and to enter a new market. Three surveys were conducted (2001, 2002 and 2003) profiling tourists visiting one or more of the seven selected National Parks, in the Republic of South Africa that formed part of this survey. Different months were chosen to conduct the three surveys in order to get a more comprehensive view of tourists visiting the parks in different seasons. One of the main findings of the research was that tourists visiting national parks are brand loyal and they come predominantly from one of two provinces in South Africa namely Gauteng and Western Cape.

Keywords: market segmentation, targeting, profile, market, tourism, tourist/s, marketing, SANParks (South African National Parks), Republic of South Africa

1. Introduction

South Africa has 20 national parks comprising 3 583 734 hectares. About 250 000 hectares (or 6,98%) thereof is private land contractually incorporated into national parks. Another 250 000 – 500 000 hectares of private land will need approximately 20% of the land included in South Africa's national parks in future, meaning that approximately 20% of the land included in South Africa's national parks will eventually be private land.

The number of parks and game reserves in South Africa are on the increase, which leads to additional competition. Except for National parks, there are also local and provincial parks and a further 9000 privately owned game reserves competing for ecotourists (Saayman & van der Merwe, 2004). Neighbouring countries such as Namibia, Zimbabwe and Botswana are also becoming more competitive it has become important to keep pace with future trends and needs for tourists. This will streamline future marketing strategies (Saayman, 2003).

To ensure continuity and growth, a destination (attraction) is dependant on, *inter alia*, tourists and the satisfaction of their needs. Although total satisfaction of tourists' needs are not the goal in itself, striving to achieve this enables the attraction to attain its own goals (Strydom, *et al.*, 2000). To achieve maximum tourist satisfaction, marketing strategists divide the heterogeneous market into fairly homogeneous groups of tourists, a process that is referred to as market segmentation (Saayman & Slabbert, 2004). Other destinations/attractions are winning competitive battles through careful analysis and response to the core values and needs of the segmented travel market place (Hassan, 2000).

This paper has been organised in the following sections. In section 2 the literature review is explained, section 3 discusses the research methodology, section 4 discuss the results and in section 5 certain conclusions and recommendations are made.

2. Literature review

Through market segmentation one can develop a tourist profile that will enable the South African national parks to target the right markets and focus its resources and efforts so that maximum penetration of that market can be achieved (Doole & Lowe, 2001). The profiling of a tourist typically involves four components, namely demographic, geographic, psychographic and socio-economic characteristics (Saayman, 2001; & Kotler, *et al.*, 1999). The above mentioned four components of profiling tourists will be compiled by applying market segmentation. Successful segmentation is the product of a detailed understanding of the market (Saayman, 2001; McDonald & Dunbar, 1995). The purpose of market segmentation is to identify homogeneous groups of people with similar characteristics from among the heterogeneous population of tourists (Laws, 1997; Doole & Lowe, 2001). This will enable the marketer to more closely match a product or service to the needs of the target market. It is known that customers respond better to offerings that are tailored and aimed directly at them, rather than at the broader public (Trigg, 1995).

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 (Saayman, 2001; Kinnear *et al.*, 1995). Segments are evaluated according to a number of criteria, but the essence of the approach is to identify the most relevant characteristics of tourists seeking particular sets of benefits from their tourism and leisure purchases (Laws 1997; Pride & Ferrell, 1987). In this process, consumer behaviour plays an important role. The tourist does not make purchase decisions in isolation. The mix of cultural, social, personal, psychological factors and previous experiences, all which influence behaviour, is largely uncontrollable. Because of the influence exerted upon patterns of buying, it is essential that as much effort as possible is put into understanding how these factors interact and ultimately how they influence decisions (Lamb *et al.*, 2002).

Successful segmentation is the product of a detailed understanding of the market and will therefore take time (Saayman, 2001; McDonald & Dunbar, 1995). Market segmentation is also one of the keys to developing a sustainable competitive

advantage based on differentiation, low cost, or a focused strategy (Aaker, 1998). Knowing the profile characteristics of target groups can help marketing strategists to tailor the product or service and promote the product or service more effectively. Each group can be targeted and reached with a distinct marketing mix (McDonald & Dunbar, 1995). Communication effects have a direct bearing on the prospective tourist's decision to act. The prospective tourist decides whether or not to respond to the advertising by taking action (Pritchard, 1998). To be of use, markets need to be segmented according to attributes that can relate to the product or service, distribution, price and media (Andereck & Caldwell, 1994). Benefits of market segmentation include:

- long-term relationships can be formed with tourists who are brand loyal (Nickels & Wood, 1997);
- gauging the park's current position, as it is perceived by the tourists, relative to the competition;
- segmentation can help guide the proper allocation and use of marketing resources (Strydom *et al.*, 2000; Semenik, 2002);
- new markets can be detected and the success of marketing campaigns can be measured;
- scarce resources are not wasted and the marketing message/communication can be very specific;
- skills and insights used in segmenting the product market give the National Parks an important competitive advantage by identifying buyer groups that will respond favourably to the park's marketing efforts (Slabbert, 2002);
- long-term growth can be secured by understanding each tourist market as an individual group of tourists with their distinct cultural make-up (Reisinger & Turner, 1998);
- better service and facilities can be delivered (Saayman, 2001).

Based on the above, the purpose of this paper is to target the right markets for South African National Parks by profiling the typical tourist who currently visits the parks. This information will help park management and marketers in the formulation of marketing policies and development strategies in order to maintain a competitive advantage.

3. Method of research

The method of research was twofold, namely a literature study and a survey. The literature study focused on marketing in order to compile a questionnaire. Research by Kotler *et al.* (1999) and Saayman (2001) gave insight into what aspects are relevant for the development of a profile of tourists to the park. The surveys were conducted by means of questionnaires completed by field-workers whilst interviewing tourists in the following five parks in 2001, namely the Kruger National Park, Kgalagadi Transfrontier Park, Karoo National Park, Tsitsikamma National Park and Addo Elephant National Parks. After the survey in 2001 two parks were added to the list for the 2002 and 2003 survey, namely: Golden Gate and Augrabies National Park. Only overnight visitors formed part of these surveys, therefore day visitors were excluded.

The arrivals of the overnight visitors of the 7 selected National Parks in 2001 were 558 903 and shown an increase of 77% in 2003 the breakdown of the arrivals of the various parks for 2001-2003 are indicated in Table 1.

Table 1: Tourist arrivals in selected National Parks

Name of Park	2001	2002	2003
Kgalagadi Transfrontier park Overnight visitors	22143	46285	50049
Karoo National Park Overnight visitors	28665	26058	28034
Tsitsikamma National Park Overnight visitors	31483	49483	61667
Addo Elephant National Park Overnight visitors	17593	28752	31660
Kruger National Park Overnight visitors	391316	494260	505738
Golden Gate National Park Overnight visitors	34693	23275	20434
Augrabies National Park Overnight visitors	33010	29446	32936
TOTAL	558 903	697 559	730 518

(SANParks, 2001; 2002; 2003)

The 2001 survey was completed during the first two weeks of May and the 2002 survey was completed during the first two weeks of July. The reason for this was

because the months of May to July are rated as shoulder to high season and it is also the best time of the year to view game in this park (See Table 2 for the survey outline). In 2003 the questionnaire was completed in July/ Sept/ Dec. A random sampling method was used to determine the number of tourists who should form part of the survey. Interviews with 471 people were conducted in 2001 a total of 572 questionnaires were completed in 2002 and 637 questionnaires in 2003. The number of participants was determined by the availability of tourists, bed capacity and a limitation of funds available which had an impact on the length of stay of the research in each park. A structured questionnaire was used. The questionnaire dealt with demographic, socio-economic, geographic and psychographic information. Respondents had to rate aspects on a five-point Likert scale, where: 1 = less important, 5 = very important.

Table 2: Survey outline

Name of Park	2001	2002	2003
Kgalagadi Transfrontier park	75 (May)	75 (May)	77 (July)
Karoo National Park	41 (May)	30 (July)	50 (Dec)
Tsitsikamma National Park	73 (May)	48 (July)	122 (Dec)
Addo Elephant National Park	62 (May)	36 (July)	61 (July)
Kruger National Park	220 (May)	323 (July)	246 (Dec)
Golden Gate National Park	Research started in 2002	30 (July)	46 (Sept)
Augrabies National Park	Research started in 2002	30 (May)	35 (July)
TOTAL	471	572	637

4. Discussion of results

From the surveys the following results were obtained. Only the highest percentage in each category are indicated in the results. An average over three years were determined for each National Park and from these results the highest percentage of the seven parks were used to indicate the profile of tourists visiting selected National Parks of South Africa.

4. 1 Demographic profile

From Table 3 it is clear that respondents who completed the questionnaire are mainly male, between the age group of 35-49 years who are married, Afrikaans speaking tourists who travel in groups of approximately 3 persons and practice a professional occupation.

Table 3: Demographic profile

	Average of 2001-2003	
Gender	Male	63%
Age	35-49 years	48%
Language	Afrikaans	52%
	English	37%
Marital status	Married	75%
Size of travelling group	3 to 4	40%
	1 to 2	35%
Occupation	Professional	33%

4.2 Socio-economic profile

Table 4 shows that the respondents' annual income is approximately ±R200 000. Most of the tourists are well-educated and this supports the notion that they are in professional occupations. Their most common mode of transport is Sedan vehicles. The average expenditure per person are R2595.69 and 81% of the tourists will still visit the SANParks if they increase the prices with 10%.

Table 4: Socio-economic profile

	Average of 2001-2003	
Annual income	R50 000-R200 000	43%
	R500 000+	10%
Education	Diploma/degree	39%
Mode of transport	Sedan	35%
	4X4	25%
Expenditure	R2595.69 per person per trip	
Price elasticity	10% increase	81%

4.3 Geographic profile

Tourists to this park are mainly South Africans who reside in the Gauteng or Western Cape province.

Table 5: Geographic profile

	Average of 2001-2003	
Province	Gauteng	37%
	Western Cape	26%

4.4 Psychographic profile

Fifty five percent of the tourists in Table 6 indicated that they had visited one of the national parks over the past 3 years an average 2-5 times per year. This is an indication that most of the tourists are brand loyal. From a parks management perspective, it is necessary to maintain a high quality of service to persuade these tourists to return annually. The reasons for visiting SANParks are: to relax and to get away from the regular routine and their preference for these parks are the variety of wildlife, accommodation and beautiful nature. The decision to travel to the SANParks was made at least three weeks in advance and the respondents stay between 1-7 days. The tourists preferred leisure activities are travelling and game viewing. The tourists prefer self-catering facilities. Their expectations were met and they would definitely recommend the SANParks.

From Table 6 it may be concluded that family and friends are an important source of information for tourists. Word of mouth was followed by magazines, specifically the Getaway. The newspaper that they read the most are the Rapport/Sunday Times. The television channel that they watch is DSTV and the television programme that are most enjoyed by respondents are documentaries and news.

Table 5: Personal Type

	Average of 2001-2003	
<i>Personality type</i>		
Preferred leisure activities	Game viewing	80%
	Travel	69%
<i>Buying behaviour</i>		
Frequency of visits to national parks (over past 3 years)	2-5 times	52%
Preference parks	Variety of wildlife	30%
	Accommodation	19%
	Beautiful nature	16%
Reason for visiting	To relax	79%
	To get away from routine	69%
	Family recreation	66%

Length of stay	1-7 days	81%
Booking arrangements	21 days and longer	68%
Accommodation preference	Self-catering	63%
Were expectations met?	Yes	88%
Recommend the National Parks?	Yes	96%

Table 6: Media usage

	Average of 2001-2003	
Came to hear of Park	Family and friends	56%
Magazines	Getaway	56%
Newspapers	Rapport/ Sunday Times	28%
	Die Beeld	25%
Radio	Radio Sonder Grense	24%
	Jacaranda	22%
Television (station & programme)	DSTV	55%
	MNet	31%
	Documentaries	66%
	News	65%

4.5 Profile of the tourist

In order to make sense of the information obtained above, Plog (1976) recommended the personification of target groups, so that dull statistics are transposed into a 'living' profile to which economists and marketers can respond more easily. Using the approach introduced by the Plog research group, the typical tourist to South African National parks is personified as Kobus and Alta Visagie.

Kobus and Alta live in Centurion, in the Gauteng province in the Republic of South Africa. They are Afrikaans speaking and have a daughter, Alta (junior). Kobus is graduated, drives a Sedan and works as a manager for a company in Centurion where he earns approximately R200 000 a year. The family loves to visit national parks at least once a year and stays for four days.

They heard of the park from their family and friends read articles in the Getaway as well as documentaries such as 50/50 on television. They like to listen to Radio Sonder Grense and read the Rapport. Kobus and Alta enjoy watching game as well as travelling. They visit National parks to relax and to break away from their regular

routine. They enjoy the National parks because of the variety of wildlife and accommodation.

5. Conclusions and Recommendations

The aim of the paper was to determine the profile of a typical tourist visiting National Parks of South Africa. From this research the following conclusions can be drawn:

- a specific market segment has been determined, portrayed by Kobus and Alta Visagie, which can promote all marketing efforts and makes it easy to target this particular market;
- The current profile of the market are as follows:
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- tourists visiting SANParks are brand loyal and a quality service should be sustained for the future of this market. This creates a situation where marketers can identify other potential markets to focus on them;
- needs of current tourists are basically the same, which makes it easy for the park to gain a larger part of the market.

Based on the conclusions the following recommendations can be made:

- Recommendations in terms of a marketing strategy are that SANParks should follow a twofold strategy. Firstly, maintaining the current market as indicated in this paper because this market is brand loyal. Secondly, there should also be an awareness strategy in order to expand the existing market with a focus on a younger market. Efforts should also be made to attract visitors visiting other neighbouring countries.
- **The park should also be promoted in other provinces since most of its visitors are from Gauteng and Western Cape.**

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