

A MARKET ANALYSIS OF VISITORS TO THE PRETORIA NATIONAL ZOO

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ABSTRACT

The Pretoria National Zoo is one of the top tourist attractions in South Africa and attracts thousands of visitors each year. Management strives towards improved education, recreation, conservation and preservation in the services delivered. In order to be able to develop the right product for the right markets as well as to promote this facility as a top tourist attraction, it is important to know who is making use of the product. The literature study showed that in order to use marketing budgets efficiently, it is important to be focused on attracting the right market. Competition in the tourism and leisure industry is constantly increasing and tourists can choose from a variety of attractions. In order to ensure that the zoo stays ahead of other attractions extensive research is necessary to determine the exact profile of the visitor to the zoo. The latter was also the aim of this research and in order to achieve this, a survey was conducted in which 280 people participated. The results of the survey was used to compile a profile of the visitor to the Pretoria National Zoo that will assist in future development- and marketing strategies and enable sustainable development. The article will be organised in the following manner: firstly the introduction and problem statement, which focus on, the literature study, followed by the methodology and the results of the empirical research. From the results a profile will be compiled of the typical visitor to the Pretoria National Zoo after which conclusions and recommendations are made.

Key words: Market segmentation; Marketing; Tourism marketing;
Market profile; Pretoria National Zoo.

INTRODUCTION

Pretoria National Zoo is situated in the heart of Pretoria and was established in 1899 by the director of the Transvaal Museum, Dr. J.W.B. Gunning (Muller *et al.*, 1995). Today, 104 years later, Pretoria National Zoo ranks as one of the top zoos in the world (Saayman, 2001). More than 7 000 individual mammals, birds, reptiles, fish and amphibians can be seen on the 80 hectares of the zoo. The main functions of the zoo are education, recreation, conservation and research (Saayman, 2001). The zoo also has sub-units in Potgietersrus and Lichtenburg, as well as a new development with Emerald Safaris Casinos at Vanderbijlpark. The visitor numbers have shown a steady increase from 428 624 visitors in 1999 to 526 219 in 2002.

In order to sustain this growth the Pretoria National Zoo needs to visualise the new challenges of ever changing tourism and leisure markets. The former must strive to change and improve its services and facilities according to the needs and expectations of its visitors (Saayman, 2001). The tourist and leisure market is becoming more specialised and professional,

particularly in the sphere of communication and information technology. Needs are changing and becoming more varied and sophisticated, because tourists (consumers) are becoming more educated and aware of what they want (Poon, 1993).

The aim of this study is therefore to determine the profile of a typical visitor to the Pretoria National Zoo. This will assist marketers to develop current and future marketing strategies that will ensure continued growth and enable them in using the marketing budget effectively. The results of the profile will also help the management of the Pretoria National Zoo to understand the needs of their visitors, thereby ensuring the right product reaches the right market. The article will be organised in the following manner: firstly the introduction and problem statement, which focus on, the literature study, followed by the methodology and the results of the empirical research. From the results a profile will be compiled of the typical visitor to the Pretoria National Zoo, after which conclusions and recommendations are made.

LITERATURE REVIEW

Compiling a profile of its customers (visitors) will help the Pretoria National Zoo in segmenting the market in order to better understand visitors' needs. Hu (1996) says that one of the most challenging and important issues of tourism and leisure marketing is to understand the tourists' (visitors) travel and leisure patterns and to know where they come from. The latter enables the marketer to match a product or service to the needs of the target market more closely. In this way a stronger competitive position can be achieved (Hooley & Saunders, 1993). Market segmentation has in recent years become an element of considerable importance in the marketing strategy of companies (Ahmed *et al.*, 1998; Mackay & Fesenmaier, 1998). This is primarily because the increasingly exact and segmented demand, as well as the intensified competition in this type of activity requires services to adapt to its specific needs.

The need of most service companies to use their limited resources efficiently is also an important motivation for market segmentation (Diaz-Martin *et al.*, 2000). It is a fact that customers respond better to offerings that are tailored and aimed directly at them rather than to the broader public (Trigg, 1995). According to Kara and Kaynak (as cited by Diaz-Martin *et al.*, 2000) service companies should identify groups of customers with homogeneous characteristics and behaviour patterns in order to satisfy the needs of their customers more successfully and to reach them in the most effective and efficient way. These companies should try to adapt their products and services as much as possible to the unique needs and desires of the segment members. Bloom (2002) states that inadequate market segmentation and clustering, together with a limited understanding of the characteristics of a segment profile could cause an enterprise to either miss a strategic market opportunity or not cash in on a tactical campaign.

Tourism and leisure markets vary in the extent of their homogeneity. When deciding which variables to use to segment markets, the marketer's goal should be to identify market segments that differ from one another in the ways they respond to a particular marketing mix (Kinnear *et al.*, 1995). Market segmentation, therefore is the process of dividing a total market into segments consisting of people with similar product needs. A market segment is therefore a group of individuals, tourists or organisations that share one or more similar characteristic because they have relatively similar product needs (Saayman, 2001). It is

evaluated on a number of criteria, but the essence of the approach is to identify the most relevant characteristics of visitors 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.

Consumer behaviour can be described as the mental, emotional and physical activities that people engage in when selecting, purchasing, using and disposing of a product and service so as to satisfy needs and desires (Wilkie, 1994). Behaviour in tourism and leisure is often a result of perceptions (Linguist, 1974-1975, as cited in Leisen (2001)). The tourist's choice of a given vacation-destination therefore depends largely on the favourableness of his or her image of the destination (Mayo, 1973; Hunt, 1975; Goodrich, 1978; Mayo & Jarvis, 1981; Woodside & Lysonski, 1989; Chon, 1991; Baloglu & McCleary, 1999). All consumers experience a similar decision-making process when selecting destinations, attractions and other tourism and leisure products. Therefore, the identification of specific market characteristics and behaviour will allow the management of Pretoria National Zoo to intervene in this process in a way that will increase the probability of desired marketing and management outcomes (Weaver & Oppermann, 2000).

Based on the above it has become important for the Pretoria National Zoo to profile its market accurately and to understand its diversity. This will enable the Zoo to deliver a better service to specific markets. 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).

METHOD OF RESEARCH

The methods used in this research were twofold namely a literature study and a survey. The literature study focused on similar research (Muller, 1991; Muller *et al.*, 1995; Oh & Jeong, 1996; Wight, 1996; Bowen, 1998) as well as marketing literature in order to compile a survey-questionnaire. Research by Kotler *et al.* (1999) and Saayman (2001), gave insight on what aspects are relevant in order to develop a profile of visitors to the zoo.

The survey was conducted at the Pretoria National Zoo by means of questionnaires during April 2001. The target population included visitors who visited the zoo during two weekends in April. The month of April was chosen because it is the month that attracts the most visitors (Pretoria National Zoo, 2000). A random sampling method was used in order to determine the number of visitors who should form part of the survey. As a result 280 people were interviewed by means of a structured questionnaire. A pilot study of 10 questionnaires was conducted in February in order to make sure that visitors understood the questions. The pilot study included people who has previously visited the Pretoria National Zoo. The questionnaire dealt with demographic, socio-economic, geographic and psychographic information, where respondents had to rate aspects on a 5 point Likert scale, where 1 equals less important and 5 equals very important. The statistical analysis was done by Statistical Services at the Potchefstroom University for Christian Higher Education and interpretation and discussion were done by the authors.

For the purpose of this article certain aspects of the market segmentation model most frequently used in tourism research was applied (Proctor, 1996; Nickels & Wood, 1997;

Kotler *et al.*, 1999; Pender, 1999; Saayman, 2001). This segmentation model is used in profiling a specific market according to:

- Demographic information for example age, gender, income, marital status, education and nationality.
- Socio-economic information for example spending patterns.
- Psychographic information for example reasons for attending and most effective marketing tools.
- Geographic information for example where visitors came from.

RESULTS

From the survey the following results were obtained:

TABLE 1. DEMOGRAPHIC PROFILE

GENDER	58%	Female	42%	Male		
AGE	32%	Under 25	43%	26-35 years	17%	36-45 years
LANGUAGE	47%	Afrikaans	29%	English	24%	African
MARITAL STATUS	47%	Married	42%	Single		
NUMBER OF CHILDREN	42%	One child				
DEPENDENT CHILDREN	42%	One child	28%	None		
SIZE OF THE GROUP	32%	Group of friends	29%	Two or more of a family		

Table 1 shows that 47% of the respondents were Afrikaans speaking, 29% English and 24% spoke an African language. The respondents comprised 58% females and 42% males. There was only a 6% difference between single (42%) and married (47%) visitors. The reason for this can be explained by looking at the age distribution, which shows a similar trend. The single largest group of visitors (42%) have one child followed by 28% who do not have dependent children. Visitors travel mostly in a group of friends (32%) or as a family of two or more (29%).

TABLE 2. SOCIO-ECONOMIC PROFILE

AVERAGE MONTHLY INCOME		R5 359-00
EDUCATION LEVEL	44%	Matric
	33%	Diploma
SPENDING PATTERNS:		
Food & Drink		R80-25
Souvenirs & Gifts		R49-00
Transport to the zoo		R43-13
Entrance fee		R60-00
Other expenditures		R 51-00
TOTAL		R238-38

Table 2 indicates that visitors to the zoo have an average monthly income of R5 359-00 where 44% have matric and 33% a diploma as their highest qualification. Visitors spent an average of R238-38 per visit on the various categories indicated in Table 2. Food and drinks generated the most income for the Pretoria National Zoo followed by entrance fees.

TABLE 3. PSYCHOGRAPHIC PROFILE

PERSONALITY TYPE						
CONSERVATIVE		Primarily home and family orientated				
PREFERRED LEISURE ACTIVITIES		94%	Travel			
		87%	Reading			
		92%	Game viewing			
BUYING BEHAVIOUR						
DECISION TO VISIT	64%	Spontaneous	20%	Less than a month		
REASONS FOR VISITING	42%	To relax	46%	Spend time with someone special	40%	For family recreation
	38%	For the benefit of the children	35%	To walk around the zoo		
REPEAT VISITORS	42%	Return visitors (1-2x) per year	34%	First time visitor	24%	Three of more times
RECOMMEND THE PRODUCT	99%	Yes	1%	No		
MEDIA USAGE						
Magazines	28%	Health & fitness	26%	Lifestyle	15%	Sports
Newspaper	24%	Beeld	17%	Sunday Independent	17%	Sowetan
	16%	Rapport				
Television & Radio	36%	Wildlife	34%	News and current affairs		
Internet	35%	Never used	29%	Use regularly	18%	Use it daily

According to Table 3 visitors view home-based activities as very important and follow a more conservative lifestyle. They prefer travelling (94%), game viewing (93%) and reading (87%) as leisure activities. The decision to visit the zoo is spontaneous (64%).

The reason for visiting is mainly to spend time with someone special (46%), to relax (42%) or for family recreation (40%). Respondents indicated that they visited the zoo at least 1-2 times per year (42%) although 34% were first time visitors and 24% have visited the zoo three times or more on 2000/2001. The majority (99%) indicated that they would recommend the zoo to others. This is important from a marketing perspective.

With regard to magazines 28% of the visitors read health and fitness magazines, 26% lifestyle- and 15% sports magazines. Respondents also indicated that with regard to newspapers, 24% indicated they read *Beeld*, 17% *Sunday Independent* and *Sowetan* respectively and 16% *Rapport*.

Preferred television and radio programmes include wildlife programmes (36%) and current affairs (34%). Respondents indicated that 35% of the visitors have never used Internet before, 29% use it regularly and only 18% use it daily.

TABLE 4. GEOGRAPHIC PROFILE

PROVINCE	53%	Gauteng		
CITY	43%	Pretoria	10%	Johannesburg

Table 4 indicates most visitors (53%) come from Gauteng Province and specifically from the cities of Pretoria (43%) and Johannesburg (10%).

PROFILE OF THE VISITOR

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 visitor to the Pretoria National Zoo is personified as Cindy van der Merwe. The following description of Cindy is based on information obtained from the survey.

“Cindy van der Merwe” is a typical visitor to the Pretoria National Zoo. She is 30 years old and Afrikaans-speaking. She lives in a house in Pretoria with her husband Mike van der Merwe, and they have one child. Cindy has a degree and she works for a company where she earns R5 359 per month. The family spends R238-38 per visit to the zoo, which they visit twice a year. The decision to visit the zoo is spontaneous and initiated by her. The reason for visiting is to relax and spend time with Mike and their child.

Cindy enjoys reading *Beeld* (a newspaper) during the week and *Rapport* on Sundays. She prefers lifestyle, health and fitness and sports magazines. Her leisure time is spent travelling, visiting game parks and reading. When time allows, she watches wildlife programmes, news and current affairs programmes on television. When asked about her thoughts on the zoo, she replied that all her expectations had been met and that she would recommend a visit to the zoo to friends and family.

According to Slabbert (2002) the information obtained from this research identified specific target markets. Once the target market has been identified marketing strategies can be formulated which will include determining price, place (distribution), promotion and product (Park *et al.*, 2002). The marketing strategy can be based on the current target market (Cindy van der Merwe) or a combination of potential or new markets (Wedel & Kamakura, 2002) as will be discussed in the next section.

CONCLUSIONS AND RECOMMENDATIONS

From this research various target markets can be identified. The one that represents the most visitors currently are portrayed by Cindy van der Merwe. The following clusters were also identified in the age category of under 25 years of age. Both males and females are single and either speaking Afrikaans, English or an African language. Their reason for visiting would be to spend time with someone special, and it might be their first visit to the Pretoria National Zoo. Based on this research their expectations were met and they would most probably return and tell others by means of word of mouth. A market that is showing great potential for future growth and could become a primary market are visitors 25–45 years of age both male and female and of African origin, married with at least one child. They read the *Sowetan* and *Sunday Independent* and are also happy with their experience at the zoo.

In conclusion one can identify more easily various markets or clusters of people in order to promote the zoo and what it has to offer easier. This approach will contribute to resources being used more effectively since the zoo is in competition with various other forms of entertainment. It all depends on the aims of the marketing department for if it was to introduce the zoo to first time visitors then these results show that they are successful as well as maintaining existing markets. The results also clearly show various other clusters that can be pursued. They show too, how income generation can be increased in terms of the items on which visitors spend money. What needs to be further researched is the ideal price strategy for the various market segments which was not addressed by this research.

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