# A SUSTAINABLE MARKETING STRATEGY FOR DUTCH TOURISTS TO SOUTH AFRICA

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### ABSTRACT

*In 2003, 120 933 Dutch tourists visited South Africa, which was an increase of 14.1% on 2002 arrivals. However in 2004 it dropped to a mere 0.24% growth. The Dutch market is regarded as a priority market because of cultural and historical links, but it is also a market that has not been properly analysed (segmented). By doing the latter it would become easier to apply the right marketing mix, which could translate into a more sustainable growth rate. In order to maintain a steady growth rate in tourism, South Africa needs to improve its marketing strategies. This research argues that it is important to establish a sustainable marketing strategy, which is based on proper market segmentation. A marketing strategy should not be a one-year campaign but rather a strategy that can lead to a steady growth rate. A survey was conducted in the Netherlands on Dutch citizens (N=325) travelling by train from Groningen in the North to Breda in the South and from this a sustainable marketing strategy which is based on three market segments has been developed.*

**Key words**: Market; Tourists; The Netherlands (Dutch); Destination marketing, Marketing strategy; Sustainability; Market segmentation.

## INTRODUCTION

According to the World Travel and Tourism Council - WTTC (1999), tourism is currently the world's largest generator of work opportunities. This is supported by the fact that there was a remarkable increase in international tourist arrivals from 25 million in 1950 to 694 million in 2002, an average annual growth rate of 7% (SAT, 2003). By the year 2020 international arrivals are predicted to reach 1.18 billion, representing an average annual growth rate of 4.1%. Long-haul travel is predicted to grow even faster (WTO, 2001).

According to Saayman (2000) and Faulkner *et al*. (2003), tourism can be defined as the total experience that originates from the interaction between tourists, job providers, government systems and communities in the process of attracting, interacting with, transporting and accommodating tourists. If one looks at travel to South Africa, as many as 6.5 million foreign tourists visited South Africa in 2003 (SAT, 2003). The main markets to South Africa in 2003 (excluding tourists from Africa) were: UK (456 468 foreign arrivals), Germany (257 018), USA (187 447), France (127 760), and the Netherlands with 120 933 (SAT, 2003). Since 1993, the Netherlands has been a strong contributor of travel to South Africa and as many as 59 tour operators in the Netherlands were offering tour packages to South Africa (SAT, 2002). 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 Netherlands is divided into twelve regions namely Drenthe, Flevoland,

Friesland, Gelderland, Groningen, Limburg, Noord-Brabant, Overijssel, Utrecht, Zeeland, Noord-Holland and Zuid-Holland (Anon., 2001).

If one looks at the arrival figures of Dutch tourists to South Africa then it becomes clear why a sustainable strategy is advised. In 2003 a 14.1% growth rate was achieved compared to 2002. However, in 2004 a growth rate of only 0.24% was achieved (SSA, 2002; SAT, 2003; Thomson, 2005). Figure 1 shows how the current growth rate is fluctuating. Uys (2003) indicated that a sustainable growth rate should be between 3-5% per year.
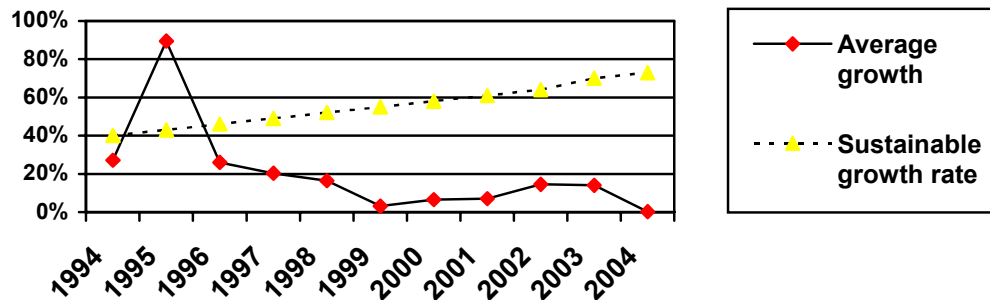


*FIGURE 1*. **AVERAGE GROWTH RATE OF DUTCH TOURISTS TO SOUTH AFRICA** (SAT, 2001, 2002, 2003; SSA, 2002; Thomson, 2005)

Since only 0.64% of the Dutch population of 15 million visited South Africa before, one can assume that South Africa as a destination (product) is still in a growth phase (CBS, 2002). This finding plays an important role in arguing for a sustainable marketing strategy.

It is also important to understand the travelling behaviour of the Dutch tourist market to be able to develop a marketing strategy. The reason for this is because in the past the South African Tourism Board (Satour), now called South African Tourism (SAT), used previous years' arrival figures to select target markets (Saayman & Saayman, 2001). The implication was a mass marketing approach where a single offering was made to the whole market (Randall, 2001). This approach, which is considered by Lamb *et al*. (2002) as not sustainable was followed for all major markets. Based on the latter, marketing allocations (budgets) 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; Slabbert, 2002). 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, 2001).

According to Van der Tuuk (2002), a market analysis in the source market is the best method even though it is expensive. The reason is that this method helps to observe current feelings and perception of the destination. Another advantage of this method is that one will also be able to determine the reasons why Dutch tourists do not travel to South Africa. The latter point is very important for a proper marketing strategy.

**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 (463%) since 1994 from R80 million to more than R450 million in 2004. As a result of 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, 2001; Uys, 2003). 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". Therefore the three main principles of sustainable tourism development are:

- ecological sustainability ensures that development is compatible with the maintenance of essential ecological processes, biological diversity and biological resources;
- social and cultural sustainability ensures that development increases people's control of their lives, is compatible with the culture and values of people affected by it, and maintains and strengthens community identity;
- economic sustainability ensures that development is economically efficient and that resources are managed so that they can support future generations (McNeely *et al.,* 1992; Saayman & Myburgh, 2002).

This research however focused on economic sustainability, which ensures that marketing is economically efficient, effective and that resources are managed to ensure future growth (McNeely *et al*., 1992; McCool *et al.,* 2001; Peter, 2005). Therefore, a sustainable marketing strategy is a strategy where a steady growth rate is maintained, market segments are identified and a marketing mix is developed for each specific segment (McDonald & Dunbar, 1995; Middleton & Hawkins, 1998; Uys, 2003; Hooley, 2004). It therefore differs from mass marketing because it is more focused. To this effect Poon (1993) argues that mass marketing is no option to promote destinations due to an increase in the number of competitors as well as a decline in the availability of resources.

The purpose of market segmentation is to identify homogeneous groups of people with similar characteristics from among the heterogeneous population of tourists. Effective market segmentation can lead to an increase in tourist numbers and better use and management of scarce resources (Middleton, 2001). The marketing mix has been described as product, distribution, promotion and pricing strategies intended to bring about mutually satisfying exchange relationships with target markets (Russell & Lane, 1999; Lamb *et al*., 2002), 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; Bowie, 2004). After the marketing mix is in place a marketing strategy should be developed.

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 (Piercy, 1992; Middleton, 2001; Hooley, 2004). Walker *et al.* (1992), Saayman (2001) and Howie (2003) suggested that the most effective destination marketing strategy is a differentiated strategy. This strategy entails that a destination identifies more than one viable target market segment and prepares marketing mixes for each segment.

In research done by Saayman and Saayman (2001) the researchers stated that 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 includes UK, Germany, USA, France and the Netherlands, which provide high economic returns. Therefore, South Africa's marketing strategies must continuously strive to improve upon the currently successful solution to the market's needs. The aim of this study is therefore to determine what a sustainable marketing strategy for Dutch tourists to South Africa entails.

In order to achieve the above mentioned aim, the paper has been organised in the following sections.  In section 3 of this article, the method of research is explained. Section 4 discusses the results of the research. Section 5 discusses the implementation of a sustainable marketing strategy and in section 6 certain conclusions and recommendations are made.

## METHOD OF RESEARCH

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. The results of the literature review were cited above.

### Measuring instrument

Based on a qualitative content analysis a questionnaire was developed. 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 socio-demographic-, economic-, psychographic- and geographic aspects of current and potential Dutch tourists by making use of a 4 point Likert scale, open questions and multiple-choice questions with multiple answers. From these results different markets would be identified and strategies formulated.

### Sampling and Sampling description

The survey was conducted in the Netherlands during March 2003. Four hundred questionnaires were distributed during different days of the week on different train routes from Groningen in the North to Breda in the South, of which 81% (N=325) of the questionnaires were useful. According to Steyn *et al*. (1998) a convenience sample of 400 from a big population will yield results within 5% of accuracy, which is statistically acceptable. The reason for 400 questionnaires was mainly because of a financial limitation.

The survey was conducted on a train route for the following reasons:

- people had time and they were willing to complete the questionnaire;
- most age groups were represented, and
- tourists from 11 of the 12 regions were present on the train.

The regions that were represented were Friesland 29% (N=94), North Brabant 18% (N=59), Gelderland 11% (N=36), North-Holland 9% (N=29), Overijssel 9% (N=29), Groningen 8% (N=26), Utrecht 5% (N=16), South-Holland 5% (N=16), Drenthe 3% (N=10), Limburg 2% (N=7) and Flevoland 1% (N=3).

**Data-analysis**

The Statistical Services of the North-West University processed the data by using the SAS System for Windows Release 9.1. Effect-sizes were used to measure the practical significance and validity of the research results (Steyn, 1999; 2000).

**RESULTS AND DISCUSSION**

The results indicated that only 8% (N=26) of the study population had visited South Africa before and 92% (N=299) have not visited South Africa. The latter is the market that is currently not targeted properly and the proposed strategy will also address this potential market. This finding supports the literature review (CBS, 2002) indicating that this market has growth potential. The greatest *similarities* of **Dutch people that have visited South Africa** and those that **have not visited South Africa** are that they read the same newspapers (*Volkskrant*, *Algemeen Dagblad*) and magazines (*ANWB KAMPIOEN*, *National Geographic*, *Allerhande*, *VIVA*, *WT Wonen*), they use email daily, watch news, current affairs and documentary programmes. Thus the results confirm that decision-making to visit a specific destination is influenced by tour operators, internet and magazine advertisements (see Table 1).

The most significanct *differences* between the two groups are as follows:

**Dutch people that have not visited South Africa** can be categorised into two potential segments, namely: students between the age of 20-24 years or an older group of 35-49 years. These tourists indicated that financial considerations followed by perception of crime and safety kept them from coming to South Africa. It is therefore important to take the cost of packages into consideration. These tourists would like to visit the Western Cape, which could be used as a draw card in getting them to South Africa. **Dutch people that have visited South Africa** are mainly between the age of 25-34 years. These tourists have a positive image of the country and specifically the natural and scenic beauty. Ninety six percent of their expectations were met, which is important from a marketing point of view, for they would most probably sell the country by word of mouth. This is supported by the fact that 22% indicated that they have been to South Africa more than four times. Therefore based on the above, three target markets were identified, of which two potential markets have not travelled to South Africa before.

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*TABLE 1.* **A COMPARISON BETWEEN DUTCH CITIZENS THAT HAVE VISITED SOUTH AFRICA AND THOSE WHO HAVE NOT VISITED SOUTH AFRICA (N=325)**

| | 92% (N=299) Have not visited South Africa | 8% (N=26) Have visited South Africa |
|---|---|---|
| Age | 20-24 years (27%) 35-49 years (24%) | 25-34 years (32%) |
| Marital status | Unmarried (51%) | Married (40%) |
| Occupation | Students (32%) | Sales personnel (16%) |
| Gross annual income | 26 681.21€ | 43 892.06€ |
| Favourite radio stations | Radio 538 (45%), Sky radio (31%) Radio 3 FM (28%) | Sky radio (32%), Radio 538 / Radio 3 FM (28%) |
| 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%) |
| Satisfaction of expectation | | 96%-expectations were met |
| Image of South Africa | | Nature and wildlife (25%) South Africa is a world in one country (15%) Kruger National Park (15%) |
| Average spending in South Africa (excluding air tickets) | | R13 535.71 |
| 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 **effect size** determined the practical significance between the different age groups, which not only makes the difference independent of units and sample size, but relates it also with the spread of the data according to Steyn (1999) and Steyn (2000). The practical significance of the three age groups were measured by using the following factors: marital status, occupation, gross annual income, influences of decisions to visit a specific destination, size of international travelling group, average length of stay, reasons for visiting South Africa and reasons for not visiting South Africa. Only those that have a small-large effect size were indicated in Table 1 and 2. The other factors that were not indicated had no effect. Cohen (1988) gives the following guidelines for the interpretation of the effect size in the current case:

  (a) small effect: $d=0.2$,  (b) medium effect: $d=0.5$  and (c) large effect: $d=0.8$.

The factors that were measured for practical significance and indicated a medium to large effect size are indicated in Table 2. According to Table 2 the socio-demographic aspects for the different age groups that have practical significance are marital status, occupation and coupled to this, income. Hence the marketing strategy should take into consideration that the 20-24 years are primarily unmarried. The 25-34 years are 40% married and the 35-49 years are mostly married. An analysis of occupation showed that the 20-24 years are mostly students whilst the 35-49 years of age category are mostly managers and professionals. The reasons for travelling revealed that the younger market prefers to travel in Europe because it is cheaper and the travelling distances are shorter. If one looks at the reasons why 25-34 year old tourists visited South Africa, scenic beauty remains the major draw card. Again this research support findings that most tourists from other countries travelling to South Africa visit the latter for its scenic beauty (Saayman & Saayman, 2001; SAT, 2003; Uys, 2003).

*TABLE 2*. **EFFECT SIZES OF THE AGE GROUPS 20-24 YEARS (N=84), 25-34 YEARS (N=65) AND 35-49 YEARS (N=78)**

|  | **Effect size** |
|---|---|
| Marital status | 0.71 ** |
| Occupation | 0.88 ** |
| Reasons for visiting South Africa<br>- Climate<br>- Scenic beauty<br>- Culture<br>- Cheap destination | <br>0.53 *<br>0.77**<br>0.54 *<br>0.49 * |
| Reasons for not visiting South Africa<br>- Children too young to travel<br>- Income (See calculations below) | <br>0.47 * |

** Large effect: Practical significant
*  Medium effect: Might be an indication of a practical significant effect

The effect size of the average income of the three age groups were determined by using the standardised difference between the means of two populations, i.e. the difference between the two means divided by the estimate for standard deviation. The following formulae were used:

$$d = \frac{\left| \bar{x}_i - \bar{x}_j \right|}{\sqrt{MSE}}$$

d    = effect size
MSE = the mean square error of analysis of variance which is 14493.87 (Root MSE)
Xi-Xj= is the difference between Xi-Xj without taking the sign into consideration.

The data that were used to determine the effect size of income are indicated in Table 3.

*TABLE 3.* **INCOME (N=162)**

| Age group | Mean |
|-----------|------|
| 20-24 years | 11329.20€ |
| 25-34 years | 28389.47€ |
| 35-49 years | 39907.46€ |

Difference between the age group 20-24 years and 25-34 years:

$$\frac{(11329.20 - 28389.47)}{14493.87}$$

= 1.17 large effect size

Difference between the age group 25-34 years and 35-49 years:

$$\frac{(28389.47 - 39907.46)}{14493.87}$$

= 0.79 large effect size

Difference between the age group 20-24 years and 35-49 years:

$$\frac{(11329.20 - 39907.46)}{14493.87}$$

=1.97 large effect size

The income of the three different income groups differ, with the largest effect size difference between the age group of 20-24 years and 35-49 year old Dutch citizens which indicates that the larger the effect size the more significant is the difference. As one would expect that a higher age group should result in higher income. This translates into presenting different product offerings for different markets because of different needs (McDonald & Dunbar, 1995; Middleton & Hawkins, 1998; Hooley, 2004). Added to this is length of stay and being able to afford more luxuries and comfort. These three age groups (segments) formed the bases for the development of a sustainable marketing strategy.


**IMPLEMENTATION OF A SUSTAINABLE MARKETING STRATEGY**

A sustainable marketing strategy for the Dutch tourist market to South Africa was made up by using the following (a) type of strategy, (b) market segments and (c) marketing mix for the following three segments: 20-24 years, 25-34 years and 35-49 years (Uys, 2003).

a) Type of strategy
   A differentiated strategy will be followed which implies that more than one viable target market segment is identified and marketing mixes for each segment are prepared.

b) Market segments

A cluster analysis was used to identify the segments (tourists were grouped together with similar profiles on the measured bases), and from this three segments were identified.

c) Marketing mix

The marketing mix according to Kotler and Armstrong (2001) indicated that the former consists of the product, price, place and promotion. The marketing mix for the Dutch market is as follows:

**Product:** Dutch citizens, depending on their age, will visit places with a lot of entertainment, scenic beauty, wildlife or historical attractions. The Dutch citizens that have visited South Africa indicated that the reasons for visiting the country were scenic beauty, holiday/leisure, game/wildlife and climate. Key attributes that could be used to distinguish the segments are occupation, income and marital status. Hence, one product that fits all is clearly not the way to go. The latter is the current approach by SA Tourism. The Western Cape Province and specifically Cape Town could be used as a draw card to attract especially the 20-24 and 35-49 year old tourists to South Africa. The 20-24 year old tourists also require a variety of entertainment.

**Price:** The Dutch market and specifically the 20-24 year old tourists are price sensitive, and therefore affordable tour packages should be offered to this market. These packages should be competitive with packages offered in other parts of Europe as well as Australia. Backpacking tours for students (20-24 years) and more exclusive tours for higher income groups (25-34 and 35-49 years of age) can be offered.

**Place:** The Dutch tourist market can be reached by increasing the number of tour operators and travel agents who offer and sell tour packages to South Africa (60% of Dutch citizens make use of organised travel). According to SAT (2002), currently only 59 tour operators in the Netherlands offer touring packages to South Africa. South African Tourism can increase the number of tour operators and travel agents by offering familiarisation tours that would include the media.

**Promotion:** Based on the results all three market segments can be reached by the same promotion mix, which include:

• Documentaries of South Africa.
• Advertisements on Radio 538, Sky Radio and Radio 3 FM.
• Advertisements in travel magazines such as *ANWB Kampioen* and *National Geographic*, in the food and wine magazine, *Allerhande*, or the Lifestyle magazines: *VIVA* and *WT Wonen*. National Newspapers *Volkskrant* and *Algemeen Dagblad* are also very popular. The usage of emails should also be considered. The overriding promotional message should be based on the country's scenic beauty and wildlife as well as to give assurance on tourist safety. For this purpose satisfied tourists who have been to South Africa more than once could be used to sell the destination.

Plog's model (1976) was used to personify the target groups, so that dry statistics mentioned above are transposed into a "living" profile to which economists and marketers can respond more easily. This method was successfully applied by Botha (1998) and Saayman and Slabbert (2004). In applying Plog's model "a 20-24 year old Dutch citizen" is personified as Jos Bosma. A 25-34 year old Dutch citizen as Peter Bergmans and 35-49 year old Dutch citizen as Anne Beemer. The following descriptions of Jos Bosma, Peter Bergmans and Anne

Beemer are based on the information obtained from the survey and the CBS (2002) report of tourism and recreation.

Jos Bosma is a 22 year old male who is an unmarried student. Jos earns 11 329€ per year and therefore likes to go on affordable tours normally doing back-packing. Jos undertakes one long holiday for two weeks per year and travels with two or three friends. He normally spends 59€ per day. He has not visited South Africa but normally likes to travel in Europe, visit places like Turkey, and also prefers visiting cities with a variety of entertainment.

Peter Bergmans is a 30 year old male who is a married to Yvonne. Peter is a salesman who earns 43 892€ per year and undertakes one long (two weeks) and one shorter (one week) holiday per year with his wife. He normally spends 51-70€ per day. He has visited South Africa but travels more often to France and Spain. Peter likes to see most of the countryside but also likes to visit big cities. He likes to visit places of scenic beauty and wildlife and to stay in his own holiday house or tent.

Anne Beemer is a 42 year old female who is a married to Emiel. Anne is a non-profit worker who earns 37 806€ per year and likes to go on exclusive tours with her husband and daughter. Anne also prefers one long holiday for two weeks and a shorter stay of one week. She normally spends 52€ per day. She has not visited South Africa but has travelled in Europe to countries such as France and Switzerland. She likes to see the countryside and have a nature experience but also enjoys historical attractions.

Peter visited South Africa but Anne and Jos have not been to South Africa. The lack of knowledge by Anne and Jos were identified as one of the reasons for their not visiting South Africa.


## CONCLUSIONS AND RECOMMENDATIONS

The main aim of the study was to develop a sustainable marketing strategy for Dutch tourists to South Africa. The strategy is based on the premise that different target markets should be identified and a marketing mix for each target market should be developed. This was achieved by means of a survey in the Netherlands and statistical analysis of the data. The strategy therefore focuses on both those that have travelled and those that have not been to South Africa. Previous strategies by SA Tourism (SAT) were based on arrival figures only, therefore ignoring the market and their reasons for not travelling to South Africa. The latter makes up 92% of the potential Dutch market. Taking the growth of the marketing budget into consideration it supports the fact that the current strategy is failing due to the fact that tourist arrivals shows a sharp decline whilst marketing spend has increased.

The contribution of this research is the successful application of a differentiated strategy to sustain marketing initiatives. It was the first time that this methodology was applied in South Africa for this market and resulted in three target markets that were identified. The reason why this strategy can be considered sustainable is because it is applicable to a greater number of potential tourists (markets) from the Netherlands. It can also assist the marketing agency (SAT) to focus its resources on promoting South Africa in the Netherlands. In order to ensure that the market is growing it becomes important to repeat this process every 3-5 years. The statistical analysis clearly indicated that the factors with the largest practical significance have

been income, occupation and marital status. Coupled to this is the reason for visiting South Africa, namely scenic beauty.

## ACKNOWLEDGMENTS

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# NOTES