THE ROLE OF BEST PRACTICE IN DELIVERING COMPANY STRATEGY: THE CASE OF STER-KINEKOR

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Submitted in partial fulfilment of the academic requirements for the degree of Master of Business Administration (MBA) at the University of KwaZulu-Natal (Westville Campus)

SUPERVISOR

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DECLARATION

I declare that this is my own work. It is submitted in partial fulfilment of the requirements of the degree of Master of Business Management, in the University of KwaZulu-Natal. It has not been submitted before for any degree of examination in any other university.

Fiaz Goolam Mahomed
1 February 2006

As candidate supervisor I hereby approve this thesis for submission

----

Mr Maxwell Agabu Phiri
1 February 2006

CONFIDENTIALITY CLAUSE

TO WHOM IT MAY CONCERN

Due to the strategic importance of this research it would be appreciated if the contents remain confidential and not circulated for a period of five (5) years.

Fiaz Goolam Mohamed
1 February 2006

DEDICATION

This dissertation is dedicated to my wife, Fatima and my sons, Azhar, Sohail and Zia for their love, understanding and support given to me throughout my studies. Their compassion has been instrumental to my success.

ACKNOWLEDGEMENTS

I am grateful to my supervisor Mr Maxwell Agabu Phiri for his expert guidance throughout the research process. Without his assistance, this dissertation would not have been possible. I would also like to thank the senior management of Ster-Kinekor for their support throughout this journey, in particular, Ferdi Gazendam (CEO SK Group) and Malusi Cele (General Manager).

ABSTRACT

The role of best practice in delivering Company Strategy—Brand Promise delivering "Escape through Glamour," has become an issue for the management of Ster-Kinekor as the competitive set in the entertainment arena, increases and becomes aggressive. This has compounded by the digital explosion which has made home entertainment sexy and raised the benchmark of picture and sound quality. Prices are extremely competitive and this practice is supported by the criminal element, i.e. Piracy.

The increase in live and televised sports entertainment, television entertainment in general and outdoor activities has contributed to the pressure in growing revenue. Ster-Kinekor has identified the new middle income segment as an opportunity for growth and has identified perceived value of the entertainment format as a key barrier. This is true for the Living Standard Measures (*hereafter,* LSM) 8, 9 and 10 segment of the market as well.

The need to increase the perceived value of the brand and the entertainment it offers has been identified as a key issue by senior management. This study will highlight the concepts of branding and best practice within a review of Ster-Kinekor operational (best practice) interventions. This will be followed by a detailed analysis and interpretation of 800 intercept interviews which will inform the study concerning the market impact of the interventions. In addition, informal interviews were held with various members of management.

Ster-Kinekor has introduced a number of initiatives, including a number of best practice interventions under a project entitled "Good to Great." This interventions are aimed at installing best practice within the business with the overall intention of improving customer experience and thereby driving the bottom line. The study therefore will analyse the impact of this these initiatives as intended by Ster-Kinekor management.

In conclusion, the study will provide recommendations for consideration in order to enhance the perceived value.

Key Terms: Best practice; Branding; Brand identity; Brand differentiation; Brand promise; Brand positioning; Brand equity; Intangible asset; Organisational behaviour; Profit maximisation, Strategy.

GLOSSARY

AMA	American Marketing Association
AMPS	All Media and Products Survey
CBBE	Consumer Based Brand Equity
COO	Chief Operations Officer
KPI	Key Performance Indicator
LSM	Living Standards Measure
SST	Self-Service Terminals
TPS	Toyota Production System

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THE ROLE OF BEST PRACTICE IN DELIVERING COMPANY STRATEGY: THE CASE OF STER-KINEKOR

CHAPTER 1

INTRODUCTION

1. Introduction

The impact of the brand position, namely, "Escape through Glamour" has been the subject of extensive debate within the boardrooms of Ster-Kinekor. At issue has been whether its brand position will increase revenue or is the industry rather driven by other factors such as location; convenience; product or quality of films etc. This chapter serves as an introduction to the dissertation. Following a description of the central research issue, other related topics will be introduced, which will form the subject of later chapters. These include the background and reason for the study, the research methodology and an indication of the chapters to follow.

1.1. Background

Ster-Kinekor currently competes in the broader entertainment industry. Its challenges include share of wallet and share of time for this category. In the late 1980s and early

1990s, Ster-Kinekor, together with its sector competition, enjoyed a period of substantial growth. According to Ster-Kinekor management this peaked in 1992, in what the industry has aptly called, "The Titanic[1] Year." Since this time, this sector of the entertainment industry has been the recipient of enormous competition. In particular, this came in the form of:

- Piracy
- Live international Sport and Entertainment
- DVDs
- A decline in the core LSM 8,9 and 10 base of customers, primarily white[2]
- Poor quality films

The decline in customers is not unique to South Africa, but represents an international trend. (Bond 2005). To combat this threat, Ster-Kinekor adopted a two-pronged strategy:

i. Deliver on Brand Promise, "Escape through Glamour"

ii. Pricing Strategy to entice the middle-income primarily black consumer segment

This dissertation will focus on the first part of Ster-Kinekor's strategy, namely its delivery on brand-promise "Escape through Glamour," and thus will attempt to determine whether the strategy has been successful.

[1] The 1992 film Titanic, broke all box-office records and was the means of a tremendous boom for the cinema industry. Source, Ster-Kinekor.

[2] Due to the emigration of many whites from South Africa following liberation in 1994.

1.2. Objectives of the Study

The primary objective of this study will be to measure the impact of initiatives introduced by Ster-Kinekor in terms of their ability to:

- Positively impact on consumers value perception and attitude towards Ster-Kinekor
- Enhance consumer experience in attending a Ster-Kinekor Film Theatre
- Convey and build the Ster-Kinekor brand positioning
- Provide recommendations for improving the value perception of the brand

The above schema is intended to determine whether the brand positioning strategy has resulted in additional customers and hence enhance profitability. Success is defined as customer acceptance of the brand and increased frequency.

1.3. The Research Problem

Currently, Ster-Kinekor cannot differentiate itself from its competitors. Nu Metro and Ster-Kinekor compete for locations and neither can differentiate through product. The exception is the niche cinema chain known as Cinema Nouveau, screened by Jameson. Ster-Kinekor pioneered the screening of Bollywood films with *Kuch Kuch Hota Hai* in 1992. However, since November 2004, this competitor has been dominant in this market.

However, outside of these factors, there is no differentiation. The quality of films and convenience of location are key decision drivers when consumers make their entertainment choice. The experience and physical environment are the tangible and intangible components of the brand positioning exercise both of which offer a point of differentiation and thus enhance the likelihood of repeat purchase (a key growth factor).

The research problem statement can be described as:

> **Will brand position (both tangible and intangible initiatives) deliver on the brand-promise of "Escape through Glamour" and thereby:**
>
> - **Enhance the value perception held by the consumer?**
> - **Enhance the consumer experience in attending a Ster-Kinekor Film Theatre?**
> - **Increase the profitability of Ster-Kinekor?**

1.4. Research Methodology

The premise of this dissertation is represented by a "Case Study," which Hussey and Hussey (1997) define as:

> An extensive examination of a single instance of a phenomenon of interest.

The activity of such a research study in such an organisation as Ster-Kinekor could also arguably fall within the scope of "Action Research" as defined by Coghlan and Brannick (2001):

Action research is a research approach which focuses on simultaneous action and research in a participative manner.

According to Coghlan and Brannick (2001), there are four steps in an action research cycle that need to be identified:

i. Diagnosis
ii. Planning action
iii. Taking action
iv. Evaluating action

Coghlan and Brannick (2001) further emphasise that in order to implement an action research cycle in a planned way within a large system, four specific phases need to be actioned:

i. Determine the need for change and the degree of choice
ii. Define the future state after the change has taken place
iii. Assess the present in terms of the future to determine the work to be done
iv. Manage the transition state

Within this dissertation, elements from both "Action Research" and "Case Study" methodologies will be used in the research. Because change in perceptions takes time, and various initiatives are likely to be introduced at different times, a three phase tracking study was developed. This has been conducted annually, for the past three years.

The first phase of the Ster-Kinekor commissioned research was completed prior to the initiatives being introduced and serves as a benchmark, a measurement of how consumers have viewed the Ster-Kinekor brand and film-going experience. Stages 2 and 3 were conducted at fixed intervals thereafter and the data gathered has been used to measure the impact of the various initiatives implemented.

In order to achieve these objectives, primary market research interviews in the form of intercept interviews were conducted, thus ensuring all respondents had been exposed to the changes being measured. The sample was selected at random in order to be representative of existing cinema patrons, but was also analysed by segment base size in order to allow for proportional random sampling.

The questionnaire covered the following areas:

- Demographics
- Film-going frequency
- Perceived value for money of film-going experience (day of interview)
- Ster-Kinekor share of film-going
- Rating of Ster-Kinekor on a number of brand attributes
- Rating of Nu Metro on the same set of brand attributes
- Rating on each experiential "touch point" including:

- Overall look and feel of the cinema
- Film information available
- Queuing for tickets
- Box Office staff
- Choice of films available
- Queuing for refreshments
- Refreshments vending staff
- Choice of refreshments available
- Going into the film and finding your seat
- Overall impression of film theatre
- Comfort of seats
- Picture quality
- Sound Quality
- Trailers
- Advertisements
- Toilet Facilities

- Reasons for each given rating
- Changes noted
- What changes say about Ster-Kinekor

The questionnaire is included in Appendix E. The research methodology will be detailed in Chapter 3.

1.5. Limitations

- The study covered 28 of the 45 Ster-Kinekor Theatre sites and excluded those sites outside of South Africa. The sites in Zimbabwe, Namibia and Zambia are the most difficult to include within the research cohort because of the distance involved and were thus not included in the study.
- The quality of films might improve during the study.
- The study focused on the impact of best practice interventions in operations only. Exploratory interviews suggested that this was the only area in which changes were to be implemented.
- The majority of the information was based on interviews, while only limited information was available from documentation.
- The information was provided on the basis that it remained confidential.

1.6. Value of the Study

The study will provide evidence to the senior management of Ster-Kinekor on its assumption that the implementation of best practice will lead to an enhancement of the brand and by implication an increase in customer attendances and revenue. The management team will then be in an informed position to decide whether to continue with their current marketing strategy or consider other alternatives. Geographic location and product have been the key success factors of film theatres to date.

Elements related to brand that have been the primary area of focus have largely been brand logos and infrastructure.

The industry faces numerous challenges and technology is bound to introduce alternative formats of entertainment. This is evidenced by the success of the Sony Playstation 2, PSP and the soon-to-be-released X Box from Microsoft, an event greatly anticipated in the market. This study seeks to provide senior management of Ster-Kinekor with well-researched analysis on the current marketing strategy and critical input into the construction of future strategies to ensure the sustainability of the business into the future.

1.7. Structure of the Study

1.7.1. Chapter 2: Literature Review

This chapter provides the theoretical framework for the study and covers a review of literature on branding and best practice and their relevance to Ster-Kinekor.

1.7.2. Chapter 3: Research Methodology

This chapter details the research methodology. It explores the types of research, the type of research study adopted and details of the research process proper.

1.7.3. Chapter 4: Ster-Kinekor – A History

This chapter provides a brief review of the history and reasons for the adoption of the brand position, "Escape through Glamour," and the best practice interventions adopted and the motivation thereof.

1.7.4. Chapter 5: Presentation of Research

Within this chapter, the output of the research is presented graphically, supported by an interpretation of the results.

1.7.5. Chapter 6: Conclusions and Recommendations

Chapter 6 contains the conclusions and recommendations of the study, presented for review by the senior management, based on the interpretation of the study conducted by Ster-Kinekor in the context of the management dilemma.

1.8. Conclusion

This chapter briefly introduced Ster-Kinekor and the dilemma faced by its senior management concerning brand position and differentiation within the film entertainment industry. It concisely described the issues facing the industry and proposed a methodology to ascertain the success of the strategy undertaken by management to focus on delivery utilising the principles of best practice. Finally, the structure of the study was discussed. In Chapter 3, the research methodology will be discussed, followed by an exploration of the organisation in Chapter 4.

CHAPTER 2

LITERATURE REVIEW

2. Introduction

The previous chapter introduced the research problem and methodology, as well as identifying the limitations and value of the study. It was determined that the film theatre industry has been plagued with poor quality products, the threat of piracy and increased competition. Finally, Ster-Kinekor senior management has put in place a strategic plan to reposition its brand and focus on the delivery of its brand promise of "Escape through Glamour."

This chapter will form the theoretical framework of the present study. It will look at the brand as a concept linked to Ster-Kinekor's strategy. The chapter will also introduce organisational behaviour and the issues of people and culture, indicating where Ster-Kinekor currently stands on these issues. Finally, through the employment of a case study, it will introduce the concept of best practice.

2.1. Brand

According to Keller (2003:3), the American Marketing Association (AMA) defines a brand as a, "name, term sign, symbol or a design or a combination of them, intended to identify the goods and services of one seller or group of sellers and to differentiate them from those of the competition." For Keller, this definition presents a limited view of a brand, and suggests rather that many practising managers define a brand as one that creates a certain amount of awareness, reputation, and prominence in the marketplace. These broader understandings support the view that Ster-Kinekor should be considered a service industry and thereby differentiate its business on that basis.

Seat prices are often a subject of debate in the industry, consumers considering the price of concessions as being too high. In this regard, Ster-Kinekor has adopted a two-tier pricing strategy, based upon primary pricing (access to the cinema) and secondary pricing (price of concessions). Both revenue streams, according to its senior management are of equal importance to the financial viability of the chain.

2.2. Is a Brand a Product?

According to Kotler (2000), a product is anything that can be offered to a market for attention, acquisition, use or consumption that might satisfy a need or want. Kotler defines five levels of a product:

i. The *core benefit level* is the fundamental need or want that consumers satisfy by consuming the product or service.

ii. The *generic product level* is a basic version of the product containing only those characteristics deemed necessary for its functioning but with no distinguishing features. This scenario presents a stripped down, no frills version of the product that adequately performs the product function.

iii. The *expected product level* is a set of attributes or characteristics that buyers normally expect and agree to when they purchase a product.

iv. The *augmented product level* includes additional product attributes, benefits, or related services that distinguish the product from its competitors.

v. The *potential product level* includes all of the augmentation and transformations that a product might ultimately undergo in the future.

According to Keller (2003:4), a brand is a product that adds other dimensions that enable it to be differentiated from other products designed to satisfy a similar need. These differences may be rationally and tangibly related to the product performance of the brand, or alternatively, more symbolic, emotional and thereby intangibly related to what the brand represents.

2.2.1. What does the brand, Ster-Kinekor offer?

The product or films shown by Ster-Kinekor are similarly available to its competitors. Neither Ster-Kinekor, nor its competitors have any input into the quality, timing, lead actors or any other aspect in the making of a film. The contention of the present researcher is that Ster-Kinekor must view itself as a service industry that provides a channel for viewing films from around the world. Its business opportunity lies in the augmented product level and it is in this arena that one would assume that Ster-Kinekor has based its current strategy. The management focus has however been one that focuses purely on theatre location and product. These will always remain critical, but with the continuing growth in technology and the resultant expansion of channels for consuming films and entertainment as a whole, they will prove insufficient to increase market share and net profitably.

2.2.2. The Essentials of Brands

Biel (1992) maintains that:

> Brands not only furnish the environment in which I live, but they also enrobe me, and by doing so, help define who I am. They help me define who I am not: if I were to tell you which brands I avoid, you would learn still more about me.

According to this definition, the South-African entertainment consumer should be well informed by the brand Ster-Kinekor. Unfortunately, although the brand is synonymous with the exhibition of films, it is not understood as an entertainment option. A shift in mindset is therefore required, which would cause the consumer to consume more of the "non-blockbuster" films. This is the basis of the organisation's strategy.

2.2.3. From Brand Image to Brand Equity

Brands were first developed in the nineteenth century by industrialists who were concerned with controlling product sales from retailers (Biel 1992). If, on the one hand, brands originated initially in the field of consumer goods, on the other, brands increased in importance. As a result, brands today play a large role in the market, including the promotion of services in the business-to-business field.

Brand image should not be confused with brand equity. Brand equity refers to the monetary value of a brand, and is ordinarily assessed apart from actual manufacturing costs. In addition, brand equity can be thought of as the added cash flow achieved in the association between a brand and the primary product or service. Finally, brand equity can be considered as the premium consumers are willing to pay for a branded product or service, in contrast to another identical, but unbranded product or service (Biel 1992).

Strong brands possess more brand equity than weaker brands. Even though most marketers evaluate the strength of a brand by its market share, the strength of a brand goes beyond its market share, when it is able to exhibit certain qualities such as "charisma," "trustfulness," "salience" and "richness" (Smothers 1991, as cited in Biel 1992). Hence, a brand is considered strong when it maintains a prominent position in its particular product category, and is considered trustworthy by the consumer (Biel 1992). Further, a strong brand usually displays "shape and substance," as it evokes a richer and broader set of associations. Finally, a brand is considered strong when its name elicits certain images and words connected to it in the mind of the consumer, enabling it to be readily retrieved from memory (Leavitt 1987, as cited in Biel 1992).

From this perspective, it is interesting to note that brand image drives brand equity. While brand marketers carry the expectation of consumers willing to pay a premium price for a strong and branded product over that of an identical and unbranded product, it is often forgotten what really drives a consumer to buy one brand over another. The motor that drives consumption is consumer behaviour and perceptions of a brand, which by its very term is inherent in the concept of brand image (Biel 1992).

The Ster-Kinekor brand position "Escape through Glamour," is intended to elevate its image within the industry and the broader entertainment market. Will however, a brand marketing strategy based upon best practice alone suffice? Interventions to be highlighted in Chapter 4 will look into this question and provide focus on basic operational issues and some aspects of service, such as queues.

2.2.4. Brand Image and Its Components

The definition of brand image is a complex matter. If the equity of a brand is related to its added value, the image of a brand becomes an additional set of attributes which consumers use to connect a brand to its name. These associations involve specific perceptions and attributes of a brand, ranging from its tangibility and/or functionality to emotions and/or appeal. The array of perceptions and attributes include, speed, user-friendliness, excitement, and trustworthiness. (Biel 1992).

Brand image can also be subdivided into three components:

i. The image of the product/service provider

ii. The image of the user

iii. The image of the product/service

According to Biel (1992) the role that each of these individual components play in forming the image of a brand remain relative. In the case of the cigarette manufacturer, Phillip Morris, the role "The Marlboro Man" plays in creating brand image is at best, minimal, and yet, even though the product itself contributes to the formation of the brand image, it is from the users of the product that most of the brand image is formed (Biel 1992).

Personality is a characteristic inherent to the concept of brand image. Although most consumers have little difficulty in identifying the people who might smoke Marlboro cigarettes, not all cigarette brands possess the same characteristics, or have their image so clearly identified. Indeed, even if they did have this quality of image, some researchers would still feel that it was not enough. As a result, there is need to develop a method for describing the personality and the character of a brand. This is the reason why researchers have employed a variety of techniques that focus on developing methodologies to measure brand personality (Baker 1990).

What is the image of Ster-Kinekor? This information was not available, although in general terms the brand is synonymous with motion pictures and is considered the market leader. Interestingly, in casual conversation most consumers consider Ster-Kinekor prices to be more expensive that that its competition, when in fact, it has always been cheaper.

The second component concerns the image of the consumer. Ster-Kinekor has introduced the "Classic" and "Junction" tiers. The "Classic" tier is positioned as having snob value and is viewed as "the place to see and be seen." The "Junction" tier is positioned as a busy meeting place. These two tiers are differentiated by price, with the "Classic" tier sites additionally offering reserved seating. According to senior management, "Junction" tier sites are not inferior, but continue to offer superior picture and sound quality, high-back seating, high quality finishes and all the trimmings usually associated with the Ster-Kinekor brand. In the review of the research findings, these tier sites have a high value-for-money rating.

The third component of product / service should be split. Ster-Kinekor's products, in this case, motion pictures, are available at all its sites and are the latest from around the world. From a service perspective, this study intends providing a perspective of Ster-Kinekor's success or failure.

2.3. Brand Equity

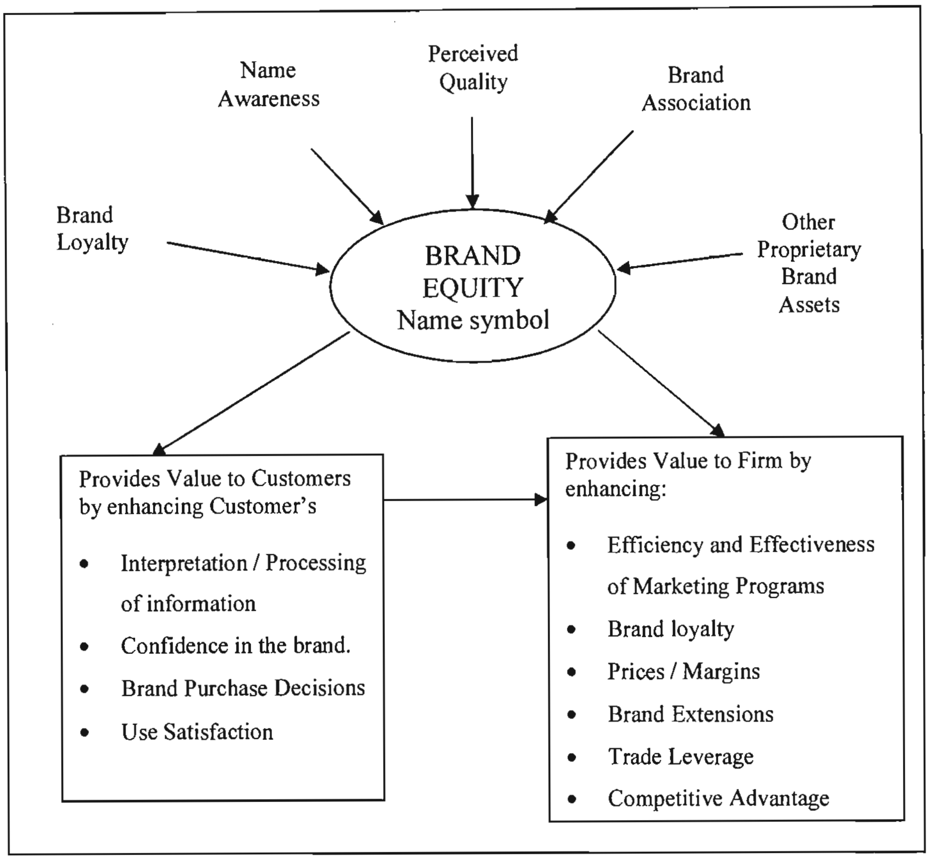


Fig. 2.1. Brand Equity [Source: Aaker (1991)].

According to Aaker et al. (1995: 730), brand equity can be defined as that set of assets and liabilities linked to a brand that adds or subtracts from the value of a product or service to a company and/or its customers. The assets and liabilities that underline brand equity must be linked to the name and/or symbol of the brand. The assets and liabilities upon which the brand is based will differ from context to context. However, they can be grouped into five essential categories:

i. Brand Loyalty

ii. Name awareness

iii. Perceived Quality

iv. Brand Associations in addition to perceived quality

v. Other propriety brand assets: patents, trademarks, channel relationships, etc.

The concept of brand equity is summarised in Fig. 1, which shows the five categories of assets that form the basis of brand equity. Fig. 1 also shows that brand equity creates value for both the customer and the firm. Aaker et al. (1995: 730), go further to suggest that a brand can be appraised by addressing and obtaining answers to the five categories listed above.

2.3.1. Brand Loyalty

What are the brand loyalty levels by segment? Are customers satisfied? What do the exit interviews suggest? Why are customers leaving? What is causing dissatisfaction? What do customers say are their problems with buying or using the brand? What is the market share? What do sales trends indicate?

Ster-Kinekor determines that good housekeeping, convenience (location) and the quality of the motion picture itself are the main reasons behind receiving a positive rating for the film theatre. This is not ideal, as Ster-Kinekor has no control over the quality and quantity of the motion pictures produced by Hollywood, and competitor aggressiveness in this sector of the entertainment business has resulted in the loss of key sites or the acquiring of new sites at a higher than normal price. Further, the loyalty membership scheme, "The Ster-Kinekor Movie Club" has to date become more of a discount club, than that of a loyalty club.

According to Cinemark, Ster-Kinekor enjoys a two-thirds market share; this is primarily due to its overall market "footprint" rather than distinguishable loyalty to the brand. This study will help determine whether the interventions introduced by senior management have had the desired impact of introducing new reasons for positive ratings.

2.3.2. Awareness

How valuable an asset is brand awareness in this market? What is the brand awareness level of Ster-Kinekor, as compared to that of its competitors? What are the present market trends? Is the brand being positively considered? Is brand awareness a problem? What can be done to increase brand awareness?

According to comparative market analysis, Ster-Kinekor enjoys a high level of awareness in the market and is synonymous with motion pictures in South Africa. This however, does not necessarily translate into loyalty. Customers are motivated by the quality of the films shown, rather than by the Ster-Kinekor chain as a service provider. This is evidenced in the research findings.

2.3.3. Perceived Quality

What drives perceived quality? What is important to the customer? What signals quality? Is perceived quality valued, or is the market moving towards that of a commodity business? Are price margins being eroded? If so, can the movement be slowed down or reversed? How do Ster-Kinekor's competitors measure up with respect to perceived quality? Are there any changes? In blind use tests, what is the brand name worth? Has it changed over time?

Ster-Kinekor has embarked on a strategy to improve quality in all areas, including infrastructure, service, people, concessions, picture and sound presentation. Profit margins however have continued to decrease due it its pricing strategy. This will be resolved by increased volume, primarily from the LSM 5, 6, 7 and 8 sectors. The standards set are based on intellectual property and that experience that resides within Ster-Kinekor as a company. There is no evidence to suggest that Ster-Kinekor has undertaken customer research or even intends to determine what its customers consider to be it mark of quality. In Chapter 6, this question is addressed with recommendations made towards future research approaches.

2.3.4. Brand Associations

What mental image, if any does the brand stimulate? Does the image have a competitive advantage? Does it have a slogan or symbol that forms a differentiating asset? How is the brand positioned among its competitors? How is each position evaluated with respect to its perceived value/relevance to its customers? How protected/vulnerable is it in relation to its competitors?

The Ster-Kinekor logo has been updated. According to management, research indicated that the logo evoked the perception of an old man. The new logo was therefore designed to give the perception of modern chic. The impact of this change has yet to be measured as the rollout of the new logo is expected to take three years. No additional information is at present available.

2.3.5. Other Brand Assets

Are sustainable competitive advantages attached to the brand name that is not reflected in the other four equity dimensions? Is there a patent or trademark that is important? Are there channel relationships that provide barriers to healthy competition?

Once again, this could not be determined, as no information is presently available. However, one can ascertain that this has been attempted with strategic business relationships having been secured with Discovery and more recently with E-Bucks. On the area of customer service, Ster-Kinekor has pioneered the concept of self-service terminals and this is a clear service differentiator from that of its competitors.

According to Aaker (2002:40) brand identity, is one of four pillars, along with brand architecture, brand-building programmes and organisational structure and processes that makes for a strong brand. The concept and relevance of brand identity will be explored in Chapter 2.

2.4. Consumer Based Brand Equity

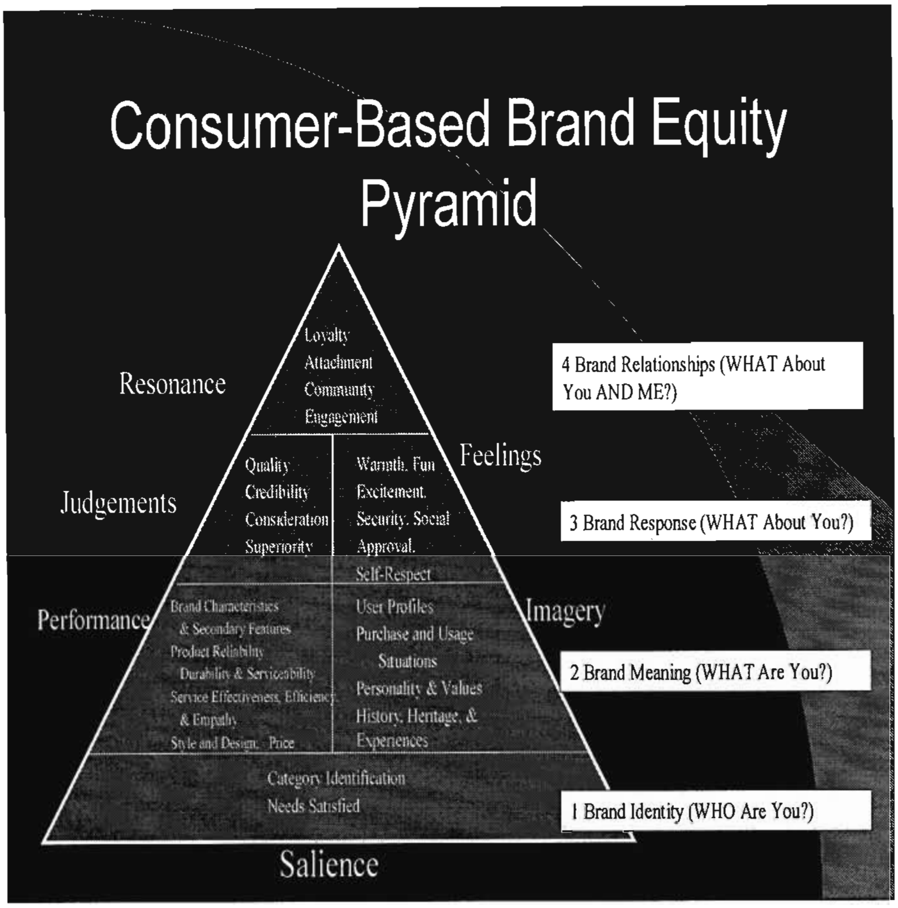


Fig. 2.2. Consumer-Based Brand Equity Pyramid

There are several building blocks within a Consumer Based Brand Equity (CBBE) Pyramid. These are:

i. At the base of pyramid, brand salience;

ii. On the left of the pyramid, brand performance and imagery;

iii. On the right of the pyramid, brand judgments and feelings;

iv. At the pinnacle of the pyramid, brand resonance.

Brand salience includes consumers' identity, brand awareness and performance. A brand's functional characteristics include reliability, service and support, style and design and price. Brand imagery includes a brand's user profile, personality and values, history, heritage and experiences; judgments and feelings. A brand's credibility is its consideration and superiority, resonance, consumers' behavioural loyalty, attitudinal attachment, sense of community (association with other users) and active engagement (willingness to be a spokesperson for the brand). For a functional brand, resonance might be driven more by judgment and performance (left side); for an image-driven brand, it may be propelled more by feelings and imagery (right side); for another brand, by a combination of performance (left side) and feelings (right side).

Interpretation of the Consumer Based Brand Equity (CBBE) model indicates that Ster-Kinekor's resonance would be better driven by feeling and imagery. The organisations brand positioning of "Escape through Glamour" suggests that this thinking is aligned. According to senior management, high levels of customer awareness have been achieved in the marketplace. The researcher however posits the opinion that motion pictures such as "Harry Potter" or "James Bond" are better examples of brands that drive behaviour. Blockbusters will and should perform better at the box office than good or mediocre motion pictures, however, experience should also have an impact. This should result in the de-risking of this entertainment format and thereby entice consumers to "escape," even through good to mediocre motion pictures.

Brand salience arguably acts as a predictor of consumer behaviour. In a study conducted by Gruber (1969), top-of-mind brand awareness parallels the amount of consumption of a specific brand in the marketplace. Top-of-mind brand awareness refers to the recognition by consumers of a certain brand over other brands in the same product category. In a similar study by Axelrod (1968), top-of-brand awareness was found to be a "sensitive and stable predictor of purchase..." behaviour among consumers (Sutherland and Galloway 1981:27). Accordingly, an in increase in saliency as measured by top-of-brand awareness results in a comparative increase in the sales of a particular brand, although, due to a lack of empirical evidence derived from controlled studies, this relationship exists primarily as an association rather than as a causal inference. Even though the need for further research remains, "...the primary direction of causal flow appears to be from media prominence, to salience" (Sutherland and Galloway, 1981:27).

Sutherland and Galloway (1981) confirm that agenda-setting research suggests that salience in the media results in a measurable level of salience in the public agenda. Further, they note advertising research suggests that salience in the public mind directly relates to behavioural outcomes, i.e., consumer purchase, as diagrammed below:

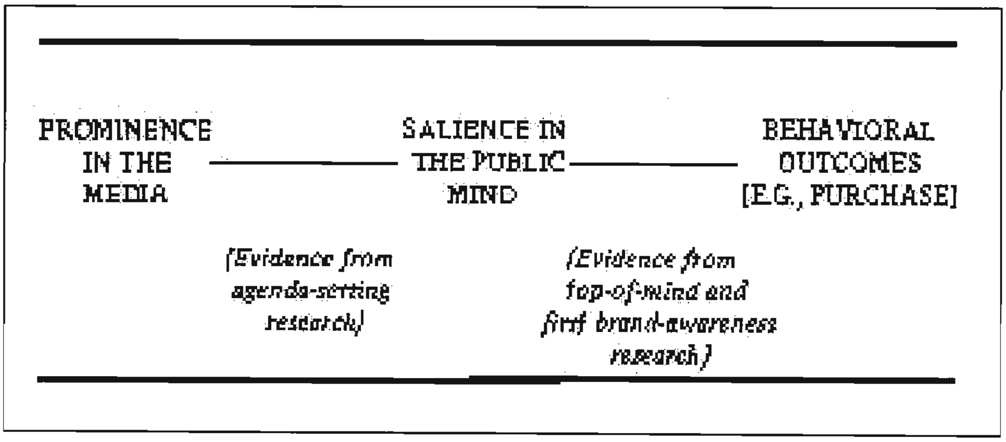


Fig. 2.3. [Source: Sutherland and Galloway (1981: 27)].

However, Sutherland also recognises other important influences that can account for a given product's market position, such as the length of representation of a product in the market. In other words, the length of time that a product remains in the market directly affects the top-of-mind awareness of that product in the public mind. Ultimately, salience of a particular brand or product results in its perceived popularity in the public mind.

Ster-Kinekor does not self-promote or market its brand well or indeed, often. Marketing and promotions generally promote the motion pictures, whereas, Ster-Kinekor as a brand is often lost in the marketing "clutter." According to Cinemark, Ster-Kinekor enjoys a two-thirds share of the South African market where its brand name is synonymous with motion pictures. Nonetheless, as with its competitors in the film entertainment sector, it has experienced a decline in customer attendance (See Chapter 1). Brand salience, by implication, cannot be viewed in isolation to market factors including, competitors, new and poor quality products and alternative entertainment formats.

2.5. Brand and Brand Identity

A strong brand should possess a rich and clear brand identity, in other words, a set of associations, which a brand strategist would seek to create or maintain. In contrast to brand image, a brand identity is aspirational, which in time may imply that the image will need to be changed or augmented. In a fundamental sense, the brand identity represents what the organisation wants the brand to stand for.

Those involved in the brand (that is, the brand team and their partners) should be able to articulate and take care of brand identity. If either element is lacking, the brand is unlikely to achieve its potential and will be vulnerable to market forces emphasising undifferentiated products and price competition.

Current research findings do not compare the Ster-Kinekor experience to any of its competitors, although there comparative research has been conducted with respect to other entertainment types. The view of the current researcher is that there remains insufficient differentiation in the brand, although current senior management strategies attempt to provide such.

To be effective, brand identity needs to resonate with its customers, representing what the company can and will do over time, while differentiating itself as a brand from its competitors. Strategic brand analysis helps management understand the customer, its competition and the brand itself, including the company behind the brand. The customer analysis must go beyond what the customers says, to what lies beneath what they do. Creative qualitative research is often useful towards this end. Another challenge is to develop a segmentation scheme that can drive this strategy. To do this effectively, the brand manager must discover which segmentation variables have real leverage and understand the size and dynamic of each segment.

Another important aspect in building an effective marketing strategy is that of competitor analysis. This seeks to examine current and potential competition in order to make sure that brand strategy will sufficiently differentiate the brand and that communication programmes will break away from the clutter in a meaningful way.

Self-analysis methodologies identify whether a brand has sufficient resource capability, and the will to deliver it. This analysis seeks to uncover not only the brands heritage and current image but also the strengths, limitations, strategies and values of the company that is creating the brand. Ultimately, a successful brand strategy needs to capture the soul of the brand, and this soul resides in the company.

Brand identity is a set of brand associations that an organisation aspires to create and maintain. These associations imply a promise to the customer from the company or organisation. Because brand identity is used to drive brand-building efforts, it should have depth, richness and meaning, and not be merely an advertising tagline or even a brand positioning statement.

When realised, brand identity should help to establish a relationship between the brand and the customer by generating a value proposition potential involving functional, emotional or self-expressive benefits or by providing credibility for endorsed brands. Table 1 illustrates Virgin's brand identity and its constructs (Aaker 2000).

The present study examines this theory relative to Ster-Kinekor's view that the operational best practice interventions are sufficient to create a platform for increased loyalty and by implication increased attendances and profit. It will examine the company's brand associations and evaluate them in relation to the brand promise of "Escape through Glamour."

Ster-Kinekor could not produce a brand identity table although they have determined their brand position. The brand identity-planning model is illustrated in fig. 2.

In Table 2, we see Virgin's brand identity. Ster-Kinekor has not clarified their brand identity, indeed no documentation could be found to suggest that one exists or that it has been communicated to the company.

1. Brand Essence	Iconoclasm	
2. Core Identity	Service Quality	Consistent best of category quality delivered with humour and flair.
	Innovation	First with truly innovative, value added features and services
	Fun and Entertainment	A fun and entertaining company
	Value for Money	Provide value in all its offerings, never just the high prices option
3. Extended identity	Underdog	Fighting the established bureaucratic firm with new creative offerings
	Personality	Flaunts the rules. Sense of humour, even outrageous. Underdog, willing to attack the establishment. Competent, always does a good job, high standards.
	Virgin symbols	Branson and his perceived lifestyle. Virgin blimp. Virgin script logo.
Value Proposition	Functional Benefits	A value offering with quality , plus innovative extras delivered with flair and humour.
	Emotional Benefits	Pride in linking to the underdog with an attitude. Fun with good times.
	Self-expressive benefits	Willingness to go against the establishment, to be a bit outrageous.
Relationship	Customers are fun companions	

Table 2.1. Virgin Brand Identity [Source: Aaker (2000)].

Ster-Kinekor's strategic outlook however seems sound, in that it provides for differentiation by offering on its brand promise of an "Escape through Glamour." A watershed moment is perhaps required, as it recognises the need to shift its thinking from merely location and product (films).

2.6. Organisational Behaviour

2.6.1. Introduction

The successful implementation and sustaining of strategies crafted in the boardroom are dependent on various factors. These include having the right people (Collins 2001), the appropriate leadership (Senior 2002), and the right culture. Other areas of readiness required are training, communication strategy, change management program and adequate resources. This section will compare Ster-Kinekor's readiness in relation to the theoretical framework.

2.6.2. The Right People

According to Greenberg and Baron (1999:4), an organisation is a "structured social system consisting of groups of individuals working together to meet some agreed-on objectives." Greenberg further asserts that in order to make these assumptions, organisations can only be made more productive if they also improve the quality of employee working conditions. This remains the best approach to studying behaviour in organisations that are dynamic and ever changing.

The successful implementation and sustenance of any strategy relies on the quality of the people driving it. Jim Collins (2001:13) proposes that organisations should ensure they have the right people on the bus, and in the right seats. When this is in place, anything is possible. Collins therefore states:

> First who...then what. We expected that good-to-great leaders would begin by setting a new vision and strategy. We found instead that they first got the right people on the bus, the wrong people off the bus, and the right people in the right seats – and then figured out where to drive it. The old adage "People are your most important asset" turns out to be wrong. People are not the most important asset. The right people are.

This suggestion is evidenced when measured against Ster-Kinekor and its marketing strategy. In any service organisation such as Ster-Kinekor, the decisive moment or measure of success as to customer service is when customers come into contact with its staff during the purchasing of a ticket or concessions; in entering the film theatre; indirectly engaging with the projectionist responsible for the picture and sound quality; and finally when exiting the film theatre.

The organisation faces numerous challenges in changing the culture of customer service or offering "An Escape through Glamour." Ster-Kinekor staff is spread geographically and consist in the main of entry-level employees. In addition, there is a high staff turnover, mainly due to the nature of the staff employed, e.g. many are students and consider this temporary employment and not a career choice or path. Employees thus work flexible hours, determined by business levels. As a result, a succession of poor quality motion pictures will result in fewer hours worked and therefore a lower wage. However, a change in culture begins at boardroom level. The approach towards staff by management will determine the extent to which vision is turned into reality.

Greenberg and Baron (2000) suggests that the traditional approach (Theory X) orientation toward people is far more negativistic than the more contemporary Theory

Y approach that is widely accepted today. Some of the key differences are highlighted in Fig. 2.4.

Theory X (traditional approach)		**Theory Y (modern approach)**
Distrusting	Orientation toward people	Accepting, promoting betterment of human resources
Basically lazy	Assumptions about people	Need to achieve and be responsible
Low (disinterested)	Interest in working	High (very interested)
Work when pushed	Conditions under which people will work hard	Work when appropriately trained and recognised

Table 2.2. Theory X versus Theory Y [Source: Adapted from: Greenberg and Baron (1999:13)].

2.6.3. Culture

Barbara Senior (2002:122-123) uses French and Bell's (1990) metaphor of an iceberg to express the two contrasting aspects of organisational life. Firstly, there is that which is above the water, namely the formal organisation and the more easy-to-see aspects of the organisation. These include the goals, strategy, structure, systems and procedures, products and services, financial resources and management. Secondly, that which is under the water, namely the informal organisation, consists of values, attitudes and beliefs, leadership style and behaviour, organisational culture and norms of behaviour, power, politics and conflicts and informal groupings. This metaphor not only points to the overt and covert aspects of the organisation, but also draws attention to the proposition that the informal systems, although being hidden, form the greater part of the organisational iceberg.

The concept of culture embraces much of the hidden part of the iceberg, and plays a significant role in either assisting or hindering the process of change. There are many definitions of culture. Kroeber and Kluckhorn (1952:181, cited in Senior 2002) claim to have examined over one hundred. Their summary definition of culture is:

> Culture consists in patterned ways of thinking, feeling and reacting, acquired and transmitted mainly by symbols, constituting the distinctive achievements of human groups, including their embodiment in artefacts; the essential core of culture consist of traditional (i.e. historically derived and selected) ideas and especially their attracted values (Kroeber and Kluckhorn 1952:181, cited in Senior 2002).

Another often-quoted definition is that of Hofstede:

> Culture is the collective programming of the human mind that distinguishes the members of one human group to that of another. Culture is this sense is a system of collectively help values (Hofstede 1981:24, cited in Senior 2002).

The present researcher's interpretation of Ster-Kinekor's culture as determined by interviews and supported by a cultural audit is that staff is aware of the mission and vision of Ster-Kinekor and has confidence in the company leadership. Areas that require work are that of communication, personnel services and physical environment. The survey however was done prior to the repositioning; therefore, one is unable to determine whether the views identified are valid in the current climate. Ster-Kinekor has however realised the importance of customer-focused criticism and that if they are to succeed as a business, cultural change must take place. One of the changes introduced is the self-service kiosk for the purchase of tickets. In an interview with the management of Ster-Kinekor, the concept of the inverted pyramid structure was discussed, whereby management is viewed as providing critical support to the frontline staff that is responsible for turning vision into reality.

The focus is illustrated in the Fig 2.4 below. It is taken from documentation supplied by Ster-Kinekor. The change of attitude is aimed to provide added value for customers, both internally and externally, and by so-doing enhance the image and reputation of the organisation, resulting in its growth. The principle applies to employees as well as support for the frontline staff. The focus is on customer service and all decisions must support this focus.

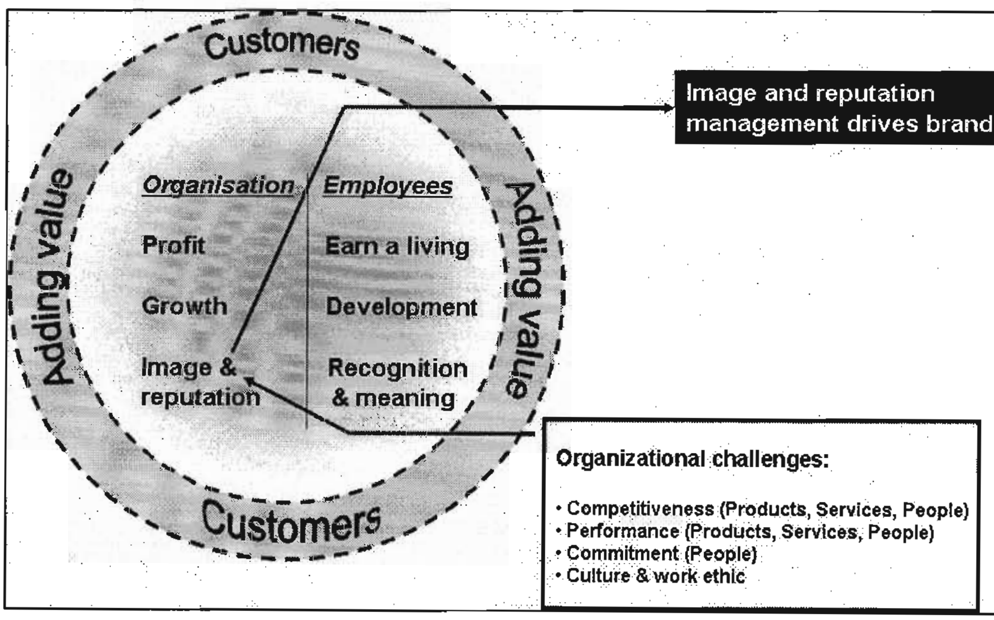


Fig. 2.4. Proving Meaning to Staff Roles [Source: *Ster-Kinekor Internal Communication Document*].

2.6.4. Management and Leadership

The issue of management is integral to the success of the strategy embarked upon. According to Barbara Senior (2002:220-221), management focuses more on the formal organisation, with leadership more naturally associated with the informal organisation. She states that management can be thought of as a function that is part of an organisation's formal structure. This agrees with Mullins (1999:166, cited in Senior 2002), when he regards management as:

- Taking place within a structured organisational setting with prescribed roles;
- Directed towards the attainment of aims and objectives;
- Achieved through the efforts of other people; and
- Using systems and procedures

Leadership on the other hand focuses on interpersonal behaviour. Watson (1983, cited in Senior 2002) describes an organisational framework as being a series of seven 'S's namely:

i. Strategy
ii. Structure
iii. System
iv. Style
v. Staff
vi. Skills
vii. Shared goals

In this schema, leadership is concerned with the soft 'S's consisting of style, staff, skills and shared goals, dealing in the main with interpersonal relationships, communication, motivation and getting the best out of our people. Yet, as Barbara Senior has stated, "Leadership is rather about influencing others in the pursuit of the achievement of the organisational goals" (Senior 2002).

	Management	Leadership
Creating and agenda	Planning and budgeting – establishing detailed steps and timetables for achieving needed results, and then allocating the resources to make it happen.	Establishing direction – developing a vision, often in the distant future and strategies for producing the necessary changes needed to achieve that vision.
Developing a human network for achieving the agenda	Organising and Staffing – establishing some structure for accomplishing planned requirements, staffing that structure with individuals, delegating responsibility and authority for carrying out that plan, providing policies and procedures to help guide people, and creating methods or systems to monitor implementation.	Aligning People – communicating the direction by words and deeds to all those whose cooperation may be needed so as to influence the creation of teams and coalitions that understand the vision and strategies and accept their validity.
Execution	Controlling and Problem Solving – monitoring results vs. plan in some detail, identifying deviations and then planning and organising to solve these problems.	Motivating and Inspiring – energising people to overcome major political, bureaucratic and resource barriers to change by satisfying very basic, but often unfulfilled human needs.
Outcomes	Produces a degree of predictability and order, and has potential of	Produces change, often to a dramatic degree, and has the potential of producing

	consistently producing key results expected by various stakeholders (e.g. for customers, always being on time; for stockholders, being on budget)	extremely useful change (e.g. new products that customers want, new approaches to labour relations that help make the firm more competitive)

Table 2.3. Comparing Management and Leadership [Source: Adapted from Senior (2002)].

The present researcher is of the opinion that at Ster-Kinekor, the process of moving from a pure management culture to one of leadership has begun. The change however, is not at a level where is contributes to a change in culture for the entire organisation. The focus appears at the customer service, and is not top-of-mind, hence, functional objectives are sometimes placed ahead of organisational objectives. Recommendations in this regard will be addressed in Chapter 6.

2.7. Best Practice

2.7.1. Introduction

In this study, the concept of best practice is limited to the operational interventions that Ster-Kinekor has introduced. In conclusion, this chapter will refer to practices employed by Progressive Insurance and Toyota. In this context, best practice can be defined as operational innovation.

2.7.2. How Operational Innovation can transform a Company

According to Michael Hammer's article "Deep Change" in the Harvard Business Review (2004), Progressive Insurance, a vehicle insurance company based in Maysfield Village, Ohio, USA, had approximately US$1.3 billion in sales 1991. By 2002 this figure had grown to US$9.5 billion. The article went on to state that although the company was not well positioned for high growth, it was a mature industry. It did not expand or globalise; or grow through acquisitions or clever marketing schemes. In fact, it did little advertising. Nor did it reduce prices or sacrifice margins.

The secret of Progressive's success was simple: it out-operated its competition. By offering lower prices and better service, it simply took customers away from its rivals. This was made possible through operational innovation. Operational innovation must not be confused with operational improvement or operational excellence. The latter terms refers to improving current processes or adopting a culture of continuous improvement. Operational innovation refers to new ways of operating. It is a step change: It moves the company to an entirely new level.

Other companies that have utilised this approach are Wal-Mart and Toyota. Toyota's Toyota Production System (TPS) will be discussed later in this chapter. An example of operational innovation is Wal-Mart's "cross docking," in which goods trucked to a distribution centre are immediacy transferred to trucks bound for stores, without being placed into storage. This has led to lower costs and together with other contributing innovations, lower prices.

Company executives who understand how operational innovation works and the cultural and organisational barriers that prevent it from happening can add to their strategic arsenal one the most powerful competitive weapons in existence. This statement and the evidence of increased customers is the essence of this study. In Chapter 4 Ster-Kinekor operational innovations strategy will be discussed in detail.

STRATEGIC BENEFITS	Higher customer retention
	Greater market share
	Ability to execute strategies
	Ability to enter new markets
MARKETPLACE BENEFITS	Lower prices
	Greater customer satisfaction
	Differentiated Offerings
	Stronger Customer relationships
	Greater Agility
OPERATIONAL BENEFITS	Lower direct costs
	Better use of assets
	Faster cycle time
	Increased Accuracy
	Greater customisation or precision
	More added value
	Simplified Processes

Table 2.4. A Powerful Weapon [Source: Adapted from Hammer 2004)

Table 2.4 above, illustrates the strategic benefits accrued to an organisation that adopts and has the ability to implement a culture of operational innovation.

2.7.3. Toyota Production System (Tps)

According to Steven Spear:

> Toyota is one of the world's most stories companies, drawing the attention of journalists, researchers, and executives seeking to benchmark its famous production system. Toyota has repeatedly outperformed its competitors in quality, reliability, productivity, cost reduction, sales, market share growth and market capitalisation.
>
> The company's success does not lie only in its ability to constantly improve its operational processes through TPS, a system of nested experiments, The reason why most companies fail to successfully implement TPS is that Toyota is an organisation tin which employees and managers at all levels in all functions are able to live these principles and teach others to apply them (*Harvard Business Review*, May 2004)

2.7.4. The Power of Principles

Further, Spear points out:

> The insight that Toyota applies underlying principles rather than specific tools and processed explains why the company continues to out perform its competitors. Many companies have tried to imitate Toyotas tools as opposed to its principles; as a result, many have ended up with rigid, inflexible production systems that worked well in the short term but did not stand the test of time.
>
> Recognising that TPS is about applying principles rather that tools enables companies that in no way resemble Toyota to tap into its sources of success. Alcoa, a company whose large-scale processes of smelting, refining etc, beat little resemblance to Toyota's discrete- parts fabrication

> and assembly operations has based its Alcoa Business System (ABS) on TPS rules. Alcoa claims to that ABS saved the company $1.1 billion from 1998 to 2000, while improving safety, productivity and quality (Spear 2004:80).

New employees at Toyota are oriented and integrated into the Toyota culture prior to "commencing" the jobs for which they were employed. Listed below are the lessons learnt by a new employee in this process:

- There is no substitute for direct observation
- Proposed changes should always be structured as experiments.
- Workers and managers should experiment as frequently as possible
- Managers should coach, not fix.

The experience of both Toyota and Progressive Insurance suggest that Ster-Kinekor can enhance its brand image, reputation and profitability by adopting best practice and operational innovation. Is there however a direct correlation? Will this translate into greater profitability for Ster-Kinekor? In respect to Progressive Insurance, the key issue is operational innovation and not continuous improvement; a step change is required. With the expectation of the self-service terminals, no evidence could be found to support Ster-Kinekor's case. Reviewing Ster-Kinekor's business processes,[1] the view of the present researcher is that the processes have been recorded but the principles have not been applied to all levels of the organisation. There is a lack of synergy between functions and an inconsistent application of the processes. The processes are being continually reviewed, but there is little to suggest that a step change is imminent. The thinking in the organisation appears however to be is in this direction.

[1] No permission to publish obtained.

2.8. Conclusion

This chapter has reviewed the theoretical framework that has informed this study. Looking at the Ster-Kinekor through this framework reveals an intention to create a differentiated service that resonates with its consumers. In interrogating the organisation, most interventions over the past eighteen months have been at the expected product level. From a people perspective, there seems to be a strong drive to build powerful teams[2] and upon leadership. According to management, while only the self-service terminals have been launched, a platform is being created to form a step change from an operational perspective to that of a differentiated experience. This is being made possible primarily through the application and internal development of dedicated technology and systems.

[2] Obtained from, *Operational Strategy Document*. Consent to append this document was not forthcoming.

CHAPTER 3

RESEARCH METHODOLOGY

3. Research Methodology

3.1. Introduction

In Chapter 2, the theoretical framework for the study was discussed. The framework highlighted the potential presented to strong brands. These included the potential to charge a premium price, increase brand equity, produce high levels of brand awareness, all of which translates into increased consumption. It further highlighted the need for the right people and ability of organisations to manage the culture change required to ensure successful brand implementation. This chapter will focus on research methodology. The concept of marketing research will be discussed and its application to the study. Both primary and secondary research was conducted to assist the interpretation of the results. Primary research included interviews with Ster-Kinekor management and 800 intercept interviews.

3.2. Marketing Research

The official definition of marketing research by the American Marketing Association states:

Marketing research is the function that links an organisation to its market through information. This information is used to identify and define marketing opportunities and problems, generate, refine and evaluate marketing actions; monitor marketing performance; and improve the understanding of marketing as a process. Marketing research specifies the information required to address these issues; designs the method for collecting information; manages and implements the data collection process; interprets the results; and communicates the findings and their implications (Aaker et al. 2000).

3.2.1. The Marketing Research Process

All research problems require their own special emphasis and approaches. Because every marketing research problem is unique in some ways, the research procedure is custom tailored. Nevertheless, there is a sequence of steps, called the research process (see Fig. 3.1 below) that can be followed when designing the research project (Churchill 1995).

Step 1	Formulate Problem
Step 2	Determine Research Design
Step 3	Design Data Collection Method and Forms
Step 4	Design Sample and Collect Data
Step 5	Analyse and Interpret the Data
Step 6	Prepare the Research Report

Table 3.1. Relationship among the Stages in the Research Process [Source: Adapted from Churchill (1999:64)].

3.2.2. Formulate the Problem

The process begins at its most general level with an analysis of the management dilemma. This is usually the symptom of an actual problem. (Cooper *et al.* 2003:66). Only when the problem is carefully and precisely defined can research be designed to provide pertinent information (Churchill 1999:63-64). The problem or opportunity should therefore be carefully and accurately crafted to ensure the desired outcome is obtained. Failure to do so may result in a missed opportunity or the management dilemma not being resolved.

Each project should have one or more specific research objectives, until these are correctly and explicitly ascertained, and the next step in the process should not be undertaken (Churchill 1999: 64).

The problem statement or management dilemma identified for this study is as follows:

> **Will brand position (both tangible and intangible initiatives) deliver on the brand-promise of "Escape through Glamour" and thereby:**
>
> - **Enhance the value perception held by the consumer**
> - **Enhance the consumer experience in attending a Ster-Kinekor Film Theatre**
> - **Increase the profitability of Ster-Kinekor**

The central objective of this study is to determine whether the role of best practice in delivering company strategy, namely, brand promise delivering "Escape through Glamour" has produced in terms of Ster-Kinekor's ability to:

- Positively impact on consumers value perception and attitude towards Ster-Kinekor
- Enhance the consumer experience of going to movies at Ster-Kinekor.
- Convey and build the Ster-Kinekor brand positioning
- Provide recommendations for improving the value perception of the brand.

The above is intended to interpret whether the brand positioning strategy has resulted in additional customers and hence increase overall profitability for the company.

The symptoms of the dilemma, as highlighted by senior management are:

i. An overall, international trend of declining attendances

ii. A stagnant pool of traditional (white; LSM 8;9;10) customers

iii. A general decline in the quality of product

iv. Piracy and technological redefinition of home-entertainment

v. Ever-widening entertainment options

These symptoms suggest that the film industry has not helped itself by reinventing the industry. The tried and tested formula, highlighted by Ster-Kinekor of location and product has been the bedrock of their previous success.

3.2.3. Determine Research Design

> The source of information for a study and the research design go hand in hand. They both depend on how much is known about the problem. If relatively little is known about the problem then exploratory research is warranted. Exploratory research may involve reviewing published data, interviewing knowledgeable people, conducting focus groups or investigating trade literature. If the problem is precisely and unambiguously formulated, descriptive of casual research is needed. In these research designs, data collection is not flexible but is rigidly specified, with respect to both the data collection forms and the sample design (Churchill 1995).

In terms of this study, primary research was conducted in the form of interviews with senior management and 800 intercept interviews. Secondary research consisted in the acquisition of a theoretical context through the review of a number of books, journals and articles.

3.2.4. Data Design Collection Method and Forms

Information required to solve a problem or dilemma does not always exist in an organisation. Relevant data will often be required, obtained through primary and secondary research. The information obtained from such research is intended to be indicative of the success. A study of the questionnaire suggests this will serve to track progress rather than provide new input. Surprisingly, no information could be found on the industry that could be considered as a benchmark.

3.2.4.1. Secondary Data

Secondary data collection concerned data collected and recorded by someone other than the user (Aaker, *et. al.* 1995:114). It may provide enough information to actually resolve the problem and can be a source of new ideas that can be explored through primary research (Aaker, *et. al.* 1995:114).

Information on branding was easily available; however it proved difficult to find specific theory related to best practice in the film theatre/cinema entertainment business environment. Ster-Kinekor provided most of the information upon request, on the understanding that it would not be published.

3.2.4.2. Primary Data

This is defined by Aaker, *et. al.* (2001:76) as: "Primary data are collected especially to address a specific research objective."

A structured questionnaire[1] conducted by React Surveys was used to interview 800 customers at thirty-three of Ster-Kinekor's South African sites to determine the impact of management interventions and by implication their success. Additionally, interviews were conducted with the management of Ster-Kinekor on the understanding that they were informal and remained confidential.

3.2.5. Sample Design and Collection Data

> In designing the sample the researcher must specify, among other things, (1) the sampling frame, (2) the sample selection process, and (3) the size

[1] Refer Appendix A

of the sample. The sampling frame is the list of the population elements from which the sample will be drawn (Churchill 1995).

3.2.5.1. Population

According to Cooper and Schindler (2003:179) a "population is the total collection of elements about which we wish to make some inferences." The population for this study consisted of all current Ster-Kinekor customers. This has been traditionally, white; LSM 8, 9, and 10.

3.2.5.2. Sampling Method

According to Arsham's statistics website:

> *Sampling:* is the selection of part of an aggregate or totality known as population on the basis of which a decision concerning the population is made. The following are the advantages and/or necessities for sampling in statistical decision making.
>
> *Cost:* is one of the main arguments in favour of sampling, because often a sample can furnish data of sufficient accuracy and at much lower cost than a census.
>
> *Accuracy:* Much better control over data collection errors is possible with sampling than with a census, because a sample is a smaller-scale undertaking.
>
> *Timeliness:* Another advantage of a sample over a census is that the sample produces information faster. This is important for timely decision making.
>
> *Amount of Information:* More detailed information can be obtained from a sample survey than from a census, because it take less time, is less costly, and allows us to take more care in the data processing stage.

> *Destructive Tests:* When a test involves the destruction of an item under study, sampling must be used. Statistical sampling determination can be used to find the optimal sample size within an acceptable cost.

A sample size of 800 customers spread across the majority of Ster-Kinekor's film theatres ensured the full brand across the Classic, Junction and Nouveau sites and pricing portfolio including Half-price Tuesday and Vitality Benefit was covered. Elements such as weekend mix of customers; Half-price Tuesdays; children; and vitality and pensioner discounts were also considered in obtaining the sample.

30 customers per site were interviewed. The interviews spanned a two week period; one during school holidays, and one out, across three time slots. This ensured that the research would be sufficiently representative of the film theatre population and consumer behaviour.[2]

3.2.5.3. Data Gathering

The gathering of research data ranges from:

> ...a simple observation at one location to a grandiose survey of multinational corporations at sites in different parts of the world. The method selected will largely determine how the data are collected. Questionnaires, standardised tests, observational forms, laboratory notes, and instrument calibration logs are among the devices used to record raw data (Cooper and Schindler 2003:179).

Intercept interviews were conducted based on the questionnaire reproduced in Appendix A.

[2] Refer to Tables 3.2 and 3.3.

3.2.5.4. Data Processing

The data obtained was processed by means of the ESPRIT programme, with the assistance of the research company, Yellowwood Brand Architects.[3] The data was coded, edited and presented by means of tables and speaker notes.

3.2.6. Analysis and Interpretation of the Data

Although researchers may amass reams of paper, information of value is that which can be analysed and interpreted in the light of the management dilemma or problem that has been identified (Churchill 1995:66).

[3] Yellowwood Brand Architects, 189 Witkoppen Road, Waterford Drive, Waterford Office Park, 8 Technology House, Ground Floor, Fourways, 2055.

According to Churchill, there are a number of steps that need to be taken in order to ensure correct data analysis:

STEPS	PROCESS	OBJECTIVE
Step 1	Editing	Forms are scanned to ensure they are complete and consistent and that the instructions were followed.
Step 2	Coding	Involved assigning numbers to answers so that they may be analysed, usually by means of software, e.g. SPSS, Esprit
Step 3	Tabulation	This refers of the orderly arrangement of table, counting the frequency of responses to each question.

Table 3.2. Steps in data analysis. [Source: Adapted from Churchill (1995: 66)].

The coded responses were captured in the computer software package, Esprit® in order to analyse the data. The table that follows suggests the statistical tests required for nominal, ordinal, interval and ratio data as recommended by Cooper and Schindler (2003: 534).

3.2.6.1. Types of Data and Levels of Measurement

3.2.6.1.1. Qualitative or Quantitative data

Information can be collected by way of statistics using qualitative or quantitative data. Qualitative data, such as eye colour of a group of individuals, is not computable by arithmetic relations. They are labels that advise in which category or class an individual, object, or process fall. They are called categorical variables. Quantitative data sets consist of measures that take numerical values for which descriptions such as means and standard deviations are meaningful. They can be put into an order and further divided into two groups: discrete data or continuous data. This study is qualitative in nature.

3.2.6.1.2. Discrete or Continuous Data

Discrete data are countable data and are collected by counting, for example, the number of defective items produced during a day's production. Continuous data are collected by measuring and are expressed on a continuous scale, e.g., measuring the height of a person. Among the first activities in statistical analysis is to count or measure: Counting/measurement theory is concerned with the connection between data and reality. A set of data is a representation (i.e., a model) of the reality based on numerical and measurable scales. Data are called "primary type" data if the analyst has been involved in collecting the data relevant to her/his investigation. Otherwise, it is called "secondary type" data. Data come in the forms of Nominal, Ordinal, Interval, and Ratio. Data can be either continuous or discrete.

	Levels of Measurements		
	Nominal	Ordinal	Interval/Ratio
Ranking?	no	yes	yes
Numerical difference	no	no	yes

Table 3.3. Levels of Measurement

Both the zero point and the units of measurement are arbitrary on the Interval scale. While the unit of measurement is arbitrary on the Ratio scale, its zero point is a natural attribute. The categorical variable is measured on an ordinal or nominal scale. Counting/measurement theory is concerned with the connection between data and reality. Both statistical theory and counting/measurement theory are necessary to make inferences about reality.

As Arsham's statistics website recalls, "Since statisticians live for precision, they prefer Interval/Ratio levels of measurement."

3.2.7. Data Management

The data was pre-coded (closed questions) and post-coded (open-ended questions), and captured on an electronic database. During this process response logic and data integrity were continually assessed. Electronic data was then converted for use in Esprit® computer software package. Analyses were all conducted using Esprit®.

3.2.7.1. Descriptive Statistics

The numerical statistical data should be presented clearly, concisely, and in such a way that the decision maker can quickly obtain the essential characteristics of the data in order to incorporate them into the decision process.

The principal descriptive quantity derived from sample data is the mean ($\bar{x}$), which is the arithmetic average of the sample data. It serves as the most reliable single measure of the value of a typical member of the sample. If the sample contains a few values that are so large or so small that they have an exaggerated effect on the value of the mean, the sample is more accurately represented by the median—the value where half the sample values fall below and half above.

The quantities most commonly used to measure the dispersion of the values about their mean are, the variance s^2 and its square root, the standard deviation s. The variance is calculated by determining the mean, subtracting it from each of the sample values (yielding the deviation of the samples), and then averaging the squares of these deviations. The mean and standard deviation of the sample are used as estimates of the corresponding characteristics of the entire group from which the sample was drawn. They do not, in general, completely describe the distribution (F_x) of values within either the sample or the parent group; indeed, different distributions may have the same mean and standard deviation. They do, however, provide a complete description of the normal distribution, in which positive and negative deviations from the mean are equally common, and small deviations are much more common than large ones. For a normally distributed set of values, a graph showing the dependence of the frequency of the deviations upon their magnitudes is a bell-shaped curve. About 68% of the values will differ from the mean by less than the standard deviation, and almost 100% will differ by less than three times the standard deviation.

3.2.7.2. Inferential Statistics

Inferential statistics is concerned with making inferences from samples about the populations from which they have been drawn. In other words, if we find a difference between two samples, we would like to know, if is this a "real" difference (i.e., is it present in the population) or just a "chance" difference (i.e. it could just be the result of random sampling error). That is what tests of statistical significance are all about. Any inferred conclusion from a sample data to the population from which the sample is drawn must be expressed in a probabilistic term. Probability is the language and measuring tool for uncertainty in our statistical conclusions.

Inferential statistics could be used for explaining a phenomenon or checking for validity of a claim. In these instances, inferential statistics is called Exploratory Data Analysis or Confirmatory Data Analysis, respectively.

3.2.8. Measures Employed

This is largely a descriptive study; hence frequencies (usually expressed in % of the total or sub-group) are most often used.

Much of the questionnaire comprises questions that are nominal data—choices of the best descriptor from a discrete set (age, gender, theatre location), where essentially the coded data represents a "yes" for the descriptor chosen and a "no" for the rest. Here frequencies are included, and the statistical significance between sub-samples on each item can be viewed.

Reasons for opinions have in some cases been recorded using a pre-coded list. Here the respondent is not prompted, and their response is coded on a pre-determined list of items (based on past research).

There are some open-ended questions where answers are recorded verbatim. In these cases, the responses are post-coded (similar responses are grouped and given the same code) and the codes captured. This essentially transforms these questions to nominal data. The research coders are trained to code into fairly detailed and specific categories, so that depth is not lost. In most cases the Yellowwood Brand analysts have subsequently re-grouped these detailed answers into larger themes and presented those. (The original detailed answer groupings are still available for view and are used to "flesh out" the analysis where appropriate).

Some questions explore actual values, for example amount spent or the number of people attending a motion picture. These have been captured as real numbers and post-coded into interval scales (e.g., R0-R14, R14.01-R19.99 etc).

Rating scales are included in places where respondents rate performance in set areas—usually non-comparative scaling where each item is rated on its own scale rather than in relation to the other items. Where rating scales (e.g., balanced monadic/itemised and ordinal scaling such as Very Good, Good, Average, Poor, Very Poor are given scores afterwards, or line-marking/continuous scales ratings out of 5 where 0=very poor and 10=Very Good) have been employed, distributed across the scale range (e.g., 1/10, 2/10 etc). Finally, "top box" (% giving top rating) as well as mean scores have been calculated. Presentation is based on that which gives the most meaningful view of the market for the specific sub-samples and question.

3.2.9. Significance Testing

The Esprit® computer software package is sophisticated enough to automatically recognise the nature of the data (measurement scale, real numbers, etc) and calculate the significance of differences accordingly. This study automatically included this option in all the analyses run. The numbers in the tables are colour coded to automatically show Significant Difference to assist with efficient analysis. (The analyst's judgment is still required to ensure that the decisions regarding the selection of tables are meaningful, appropriate and logical.) Green figures are most significantly different, red figures are least significantly different. The default colour scheme is based on traffic light colour codes: red numbers show little significant difference, green numbers show the most significant difference. As with road traffic lights, red means stop, so these numbers are not significant, green means go and hence these numbers are most likely to be significant.

The certainty level of the Significant Difference is indicated by the colour code at the bottom of the table. Thus, depending on the nature of the question and the implications of the use of the specific data item, the most appropriate level of significance can be used. As a rule, the study looked at the 1% or 5% levels and no further.

Ref	>99%	>95%	>90%	<90%
Chance of error	1%	5%	10%	

Table 3.4. Levels of Significant Difference

Significant differences are by default, based on the total column. In other words, the numbers are coloured depending on how significantly different they are from the numbers in the total column. The total gives the results for the sample as a whole, but influence of responses from different sites is weighted according to their attendance figures for the time period in which the survey was conducted.

3.2.10. How Are Significant Differences Calculated

According to Cooper and Schindler (2003:536) the Chi Square Test (x2) is the most widely used non parametric test of significance. It is most useful in tests involving nominal data but can be used for higher scales. Typical groupings are "yes-no," "favour-undecided-against" or class, "A, B, C or D" (Cooper and Schindler 2003:536).

T-tests are used to determine the statistical significance of a sample distribution mean as a parameter. Chi-squared tests have been used for comparisons of counts, and t-tests for comparisons of averages or values (volume data or counts). All tests are two pronged. The Chi-squared tests are all corrected for continuity using Cochran's formula.

For testing differences in proportions, the test is equivalent to a Z-test on proportions.

All the tests are correctly calculated on weighted data, even when the database is weighted to some target other than the true sample size (i.e., total population).

3.2.11. Prepare the Research Report

According to Churchill (1995:66), the research report is the document submitted to management that summarises the research results and conclusion. This will be presented in Chapter 5.

3.2.12. Limitations

The study covered twenty eight out of forty five Ster-Kinekor Theatre sites and excluded all sites outside South Africa. The sites in Zimbabwe, Namibia and Zambia are the most difficult to manage because of the distance and these were not included in the study. The information obtained from management is to be considered confidential and the results of interventions have not received the necessary permission from Senior Management to be published. The interviews were conducted in an informal setting. As stated earlier, no industry benchmarks could be obtained.

3.3. Conclusion

This chapter presented the management dilemma of declining attendances and the senior management strategy to overcome the problem, namely; repositioning the brand to provide an "Escape through Glamour," for its customers, using best practice operational interventions. The success or failure of this initiative will be determined by reviewing the output of 800 intercept interviews presented in Chapter 5. In order to contextualise the output, Chapter 4 will offer a brief history of Ster-Kinekor and summarise the best practice interventions implemented by the company.

CHAPTER 4

STER-KINEKOR – A HISTORY

4. Ster-Kinekor

4.1. One Hundred Years of Cinema in South Africa[1]

According to the Ster-Kinekor staff induction manual the company was formed in 1963, and has for many years has been the industry leader in motion picture theatre entertainment.

In making the motion picture, "Cleopatra," starring Elizabeth Taylor and Richard Burton, 20th Century Fox lost millions of US dollars. To avoid bankruptcy, it decided to sell all its overseas film theatres in order to raise money. As a result, 20th Century Fox of South Africa was sold to the insurance giant Sanlam, who already owned Ster Theatres and Ster Films. The government of the day decided that the two film companies should be operated separately, thus the name Kinekor was born. The holding company of Ster and Kinekor was Satbel, (Suid Afikaanse Teater Bellegings), now known as Primovie.

During the 1970s, Kinekor embarked on the development of film theatre/cinema complexes. This was to prove the saviour of the motion picture business in South Africa. During this period the Drive-In circuit was expanded with new Drive-In's

[1] This section adapted from materials found in Ster-Kinekor's Staff Induction Manual.

being built and existing Drive-ins bought from individual owners who had thriving businesses. Kinekor eventually owned and operated twenty five Drive-In's nationwide.

With the introduction of television to South Africa, film theatre attendances showed a dramatic decline. As a result the government allowed the two companies to merge as Ster-Kinekor with Philip MacDonald being appointed as the first Managing Director. During the first two years of the merger, no staff salary or wage increases were received due to poor business at the box-office. The entrepreneur, Sol Kerzner bought an interest in Satbel, from which Interleisure was formed. Ster-Kinekor then developed multiplex cinemas, which are so popular today. Philip MacDonald also introduced the policy of six performances per day, which proved very popular with the public. He was also responsible for building up the "Art" circuit, such as the Rosebank Mall with ten cinema theatres, which is the largest Art complex in the world.

In 2000, Ster-Kinekor introduced their "emerging market" project. Targeting black South Africans, the aim of the project was to encourage them to share in the experience of the "magic of the movies." Since the start of the project attendances have more than doubled and film club membership stands at over one million.

Another first for Ster-Kinekor and the motion picture industry in South was the launch of "Video and DVD City" franchises throughout Soweto. These franchises supply the residents of Soweto with the low cost hire of motion pictures on video and DVD, and are proving to be very popular. It is planned to expand the franchises into other South African townships in the near feature.

Today Ster-Kinekor is upholding its name as an industry leader and owns a 65% share of the market. It is also the proud owner of the "Bollywood" film industry in South Africa and is the leader in art films."[2]

4.2. Ster-Kinekor's Glamour Positioning

4.2.1. The Origin of Glamour[3]

When Ster-Kinekor initially embarked on a positioning project, the starting point was to use the category as a frame of reference, as this was seen to mirror how the consumer tended to "shop." The broad category was deemed to be entertainment, with the major differentiators (axes) in-home or out-of-home and inner-directed or outer-directed. On this basis, a set of four potential positioning directions was derived:

i. Magic
ii. Adventure
iii. Indulgence
iv. Glamour

Each positioning direction was briefly explored by senior management, and all but positioning option #3, "Glamour" was rejected. Management discarded the others for various reasons including, not being sufficiently differentiated; being owned by other category players; or a perceived inability to consistently deliver the proposition. Fig.

[2] Adapted from the Ster-Kinekor Staff Induction Manual.

4.1 and 4.2.1; 4.2.2; 4.2.3; and 4.2.4 provide a detailed exploration of each positioning option.

Out of home	**No time flexibility (now)**			Watching sport Concerts Theatre Clubbing
	Some time flexibility (choice)		Movies Small / niche	Drinking Eating Shopping
In home	**Very time flexible**	Reading Chilling	Video/DVD TV	Socialising
		Alone	**Alone or with others**	**With others**

Complementary - different senses / needs

Greatest opportunity - in vs out of home

	Inner directed	
Option 1: **Magic**		**Option 4:** **Indulgence**
Constant change (product)		Consistently deliver (channel)
Option 2: **Adventure**		**Option 3:** **Glamour**
	Outer directed	

Fig. 4.1. Category Map

[3] Supplied by Ster-Kinekor. Notes from Brand Positioning Workshop.

Fig. 4.2.1. Positioning Option 1: Magic		
Specific Qualifications	What makes me different? • Superior sound and picture quality • Multi-sensory experience beyond product • Choice and variety (which include genres and channels) • Safe and secure environment	What makes me best? • A multi-dimensional experience – total emersion • The collection of realms I can take you to • My ability to capture your imagination
Relationship	Conjuror • SK takes you to places you have never imagined. • SK transports you to across space and time into lands know and unknown.	
Personality	• Mythical • Fantastical • Mysterious • Surprising • Creative • Imaginative For example: Gandalf, Batman, The Mask	
Proposition	Living imagination	

Fig. 4.2.2. Positioning Option 2: Adventure		
Specific Qualifications	What makes me different? • Superior sound and picture quality • Multi-sensory experience beyond product • Choice and variety (which include genres and channels) • Safe and secure environment	What makes me best? • A multi-dimensional experience – a voyage beyond the here and now • The collection of worlds and cultures I can show you and teach you about • A new experience / memory without having to leave your seat
Relationship	Tour guide • SK will take you on a voyage of discovery; showing you worlds, people and places reaching as far as the imagination. • SK navigates the route and sets the course and you just sit back, relax and observe. • SK is trusted which allows you to let go and simply enjoy.	
Personality	• Stimulating • Challenging • Knowledgeable • Inquisitive • Adventurous • Passionate • Energetic For example: Astronaut, Indiana Jones, Luke Skywalker	

Fig. 4.2.3. Positioning Option 3: Glamour		
Specific Qualifications	What makes me different? • Superior sound and picture quality • Multi-sensory experience beyond product • Choice and variety (which include genres and channels) • Biggest and most popular • New and topical	What makes me best? • I present opportunity to mix with people like yourself, to see and be seen • Because I am marvellous and exciting • My ability to stimulate sensation on every level
Relationship	Producer • SK facilitates your introduction to the stars. • SK brings the right people together to create excitement and sensation. • SK facilitates the ultimate combination for the perfect experience.	
Personality	• Bold, Sexy; Sensual • Attractive • Vibrant; Charismatic • Awesome For example: Peacock, Marilyn Monroe, James Dean	
Proposition	Red carpet	

Fig. 4.2.4. Positioning Option 4: Indulgence		
Specific Qualifications	What makes me different? • Superior sound and picture quality • Multi-sensory experience beyond product • Choice and variety (which include genres and channels) • Safe and secure environment • Close and convenient • New and topical	What makes me best? • I do the work while you sit back and relax • Because I provide a variety of offerings to ensure your needs are directly catered to • My ability to amuse, excite and surprise you
Relationship	Therapist • SK intuitively understands me and my needs. • SK spoils and pampers me, makes me feel special. • SK allows me to be the king / queen.	
Personality	• Inviting • Inclusive • Intuitive • Safe • Comfortable • Consistent • Altruistic For example: Genie, PA, Mrs Doubtfire	
Proposition	Your wish is my command	

The concept of Escape is taken from the Vision of the organization, namely:

To offer all our customers

a memorable escape

into the magic of cinema

time and time again thereby ensuring sustainable growth for our company

At the heart of the vision was the concept of memorable escape. All the key concepts, e.g., time and time again, or ensuring sustainable growth, are dependent upon the customers enjoying a memorable escape. The concept of "Glamour" was added to help define the characteristics of such an escape.

This highlights a paradigm shift by Ster-Kinekor's senior management, including initiating a deliberate change with respect to consumer behaviour, i.e., the glamorous escape or experience. This, according to management, would manifest itself in customer service. Other dimensions include location and product.

4.3. Ster-Kinekor's Best Practice Strategy

4.3.1. Introduction

In this present study, the definition of best practice is limited to the operational elements at Ster-Kinekor. During the literature review, it proved difficult to obtain information on benchmarks in the Motion Picture Theatre industry. In South Africa there are two major business chains, Ster-Kinekor and Nu Metro; Ster-Kinekor has begun the process of developing standards. Nu Metro, preferred not to make any comment when asked. The responsibility for crafting and implementing the new branding strategy fell to the Chief Operations Officer (COO), [4] this included deciding on the best practice interventions, implementation, research issues, including design of questionnaire, timing of research, size of study, sample identification, scope, communication and the determination of the support structure.

4.3.2. Ster-Kinekor's Intervention

This section summarises the majority of the organisations best practice interventions intended to enhance the value of the brand. A number of initiatives are not documented are they were considered confidential. Additional key performance indicators (KPIs) measuring the impact of such interventions could also not be documented.

NAME OF THE PROJECT / INITIATIVE	BOLLYWOOD GENRE INITIATIVE
Objectives	• To increase SKT brand equity by offering film genre more appealing to the Indian market. • To create and grow Indian film circuit in South Africa.
Status	• Completed
Type of brand benefit	• Choice benefit to customers—have more film choices to choose from

[4] The Chief Operations Officer at the time was Fiaz Goolam Mahomed, author of this study.

Brand value	• Confidence in purchasing decisions i.e., deciding on the "right" motion picture.
Brand equity driver	• Value to customer—Performance.

Although this strategy proved extremely profitable, it did not result in a significant increase in turnover. The reasons for this were investigated, however, due to their nature senior management requested that they be kept confidential.

Name of the project / initiative	**Nouveau Genre Initiative**
Objectives	• To increase SKT brand equity by offering film genre more appealing to the artistic and or intellectual market.
Status	• Completed. Ongoing enhancements.
Brand identity elements	• film product, logos, děcor, uniforms, carpets, concessions.
Brand equity driver	• Value to customer—Performance.

This tool was introduced to monitor and control the key elements of an event, serve as a repository of information and most importantly, improve the quality of events hosted by the organisation.

NAME OF THE PROJECT / INITIATIVE	CAMPAIGN MASTER
Objectives	• To create an electronic system to facilitate all marketing and promotional events at cinema. • To create an electronic information system to enable storing, collating, and analysing all data from our promotional events.
Status	• In progress
Brand identity elements	• Quality / Value
Type of brand benefit	• Functional benefit to the company – efficiencies of the brand.
Brand value	• Value to company – Performance
Brand equity driver	• Competitive Advantage, i.e. more competitive because of the efficiencies, and Trade Leverage, i.e., trading better, because of efficiencies.

This tool was introduced to monitor and control the key elements of an event, serve as a repository of information and most importantly, improve the quality of events hosted by the company.

NAME OF THE PROJECT / INITIATIVE	G2G - CATERING QUEUE TIME INTERVENTION (PART -1)
Objectives	• To ensure that no customers wait for longer than four (4) minutes at Catering, at any cinema and at any time. • To achieve a smooth and uninterrupted flow of customers by optimising performance at the Catering Area. • to have all serving and dispensing equipment at the maximum of a step away from each cashier's selling point to reduce transaction time to an average of 40 seconds. • To ensure that all the Catering staff is fully and well prepared to properly serve customers before the start of every shift. • To ensure that all the Catering equipment is functioning properly at all times. • To effectively utilise all counter space to drive sales. • To assist customers in making a decision about what product to choose to purchase prior to reaching the counter.

	• To ensure that the surveillance system is administered and implemented effectively to achieve GPPP, hygiene and service standards. • To ensure that every Catering staff member is in full, proper and clean uniform at all times. • To ensure that we have supplied accurate information timeously in order to inform management on progress made and obtained assistance when required. • To ensure that the catering area is clean and presentable to the customers and is operating efficiently.
Elements	• Queue management and Queue system. • Counter Layout. • Shift preparation. • Counter stock and float replenishment. • Counter stock and float at the beginning of shift. • Float (size and denominations). • Readiness of packaging material. • Equipment.

	• Preventative maintenance. • Adequate equipment. • Merchandising. • LED Boards. • Uniforms. • Surveillance. • Measurements and data collection. • Queue time. • Transaction time.
Status	• Ongoing.
Brand identity elements	• Quality / Value
Type of brand benefit	• Functional benefit to customers—the service efficiency of the brand.
Brand value	• Competitive Advantage, i.e. more competitive because of the efficiencies, and Trade Leverage, i.e., trading better, because of efficiencies.
Brand equity driver	• Value to customer—Performance.

While the impact and success of this initiative has been significant, the information was not permitted to be published.

NAME OF THE PROJECT / INITIATIVE	G2G - CATERING QUEUE TIME INTERVENTION (PART -2)
Objectives	• To ensure that all cinemas have a standardised, effective and proper stock management system. • To ensure that stock is always ordered properly. • To ensure that all stocked is properly stored and can be accounted for at all times. • To ensure that all stock is properly issued from the controller to cashier, and is reconciled by the cashiers. • To ensure that all my stock is properly controlled. • To ensure that all my damaged stock is properly accounted for and reported.
Elements	• Stock ordering • Order stock • Receive stock • Stock storage • Secure stock • Stock utilisation • Issue stock • Sell stock

	• Stock Control • Do stock take • Conduct stock spot check
Status	• Ongoing
Brand identity elements	• Quality / Value
Type of brand benefit	• Functional benefit to customers—the service efficiency of the brand.
Brand value	• User satisfaction i.e., customers are more satisfied because of the efficiencies.
Brand equity driver	• Improved Value Perception—Performance

This outcome has been discussed under Part I.

NAME OF THE PROJECT / INITIATIVE	G2G – COMPLEX ADMINISTRATION
Objectives	• To achieve maximum operational efficiencies by ensuring that every cinema complex is 100 % compliant in all complex administration related aspects of the business. • To ensure that the cinema lines ups have been done properly • To ensure that rostering is done properly, and the COR Report is properly utilised, to manage my cinema. • T conduct management reviews of the business is properly collected, collated, and stored. • To ensure that every cinema has and uses a efficient and effective standardised system for managing its records. • To ensure that money at the cinema complex is managed properly. • To ensure that all the necessary spot checks (and audits) are properly done.
Elements	• Management reviews • Line Ups • Black Book

	• Baby G • COR Report • Rostering • Use of COR as a management tool • Paper work • Daily paper work • Weekly paper work • Monthly paper work • Filling • Management of money / Management of float • Conducting of spot checks • Box Office Spot check • Catering Spot Checks • Demographic button spot check • House Count spot check • Surveillance spot checks • Data integrity spot checks • Conduct an audit of daily box office figures, financial transactions, banking reports, sales analysis for all clubs, film club duplicate usage, film club manual swipes, re-instatements reports, credit card batches, and teller-mate slips attached to banking report.
Status	• Ongoing

Brand identity elements	• Improved efficiency
Type of brand benefit	• Shorter queues, correct cash handling, accuracy.
Brand value	• User satisfaction
Brand equity driver	• Improved Value Perception

While this intervention has primarily an internal focus, the impact, accuracy and efficiency filtered through to the external customer. It also enhanced the creation of a positive working environment. The attention and focus upon Staff and resultant appreciation for what they did was much appreciated. It later surfaced that staff previously felt neglected and were only "paid any attention" when something went wrong.

NAME OF THE PROJECT / INITIATIVE	G2G – TOILET AND FOYER MANAGEMENT INTERVENTIONS (PART 1)
Objectives	• That cinemas are always clean and hygienic at all times, this ensuring a memorable escape for our customers to ensure that every cleaning staff is always in full uniform. • To ensure that the inside of the Cinemas is always clean, tidy and hygienic. • To ensure that the administration offices are always clean, tidy and hygienic. • To ensure that the Store Rooms are always clean, tidy and hygienic. • To ensure that the kitchen is always clean, tidy and hygienic. • To ensure that the Toilets are always clean, tidy and hygienic. • To ensure that the Catering Equipment is always clean and hygienic. • To ensure that all equipment is always clean, tidy, and dust free. • To ensure that box office area is always clean, tidy, and dust free.

	• To ensure that the Cinema Complex foyer is always clean, tidy and hygienic.
Elements	• Uniforms • Foyer • In Cinema • Toilets • Administration office • Store rooms • Kitchens • Catering equipment • Other equipment
Status	• Ongoing
Brand identity elements	▪ Organisational attributes
Type of brand benefit	▪ Sensory benefit, to customers—image of the brand
Brand value	▪ User satisfaction i.e., customers are satisfied with the look and feel or image of the cinema surroundings.
Brand equity driver	▪ Improved Value Perception—Imagery

While improvement was noted in this area, the service level is considered satisfactory by management. An alternative was to outsource this function, but this has proved to be expensive.

NAME OF THE PROJECT / INITIATIVE	G2G - DOOR ACCESS INTERVENTION
Objectives	• To ensure that all our customers continue to enjoy a memorable escape when they enter, inside, and leave cinemas. • To ensure that every Door person and or Cinema Assistant managing the door access control points is in full, proper and clean uniforms at all times. • To ensure that every customer that enters a cinema has a valid ticket, stamp, and or card, thus ensuring our ability to continue offering a memorable escape to our customers. • To ensure that there is proper management of customer flow coming in and going out of the auditoriums. • To ensure that customers enjoy a memorable escape through proper greeting, directing and providing the accurate information. • To ensure that the look and feel of the door access control points always supports memorable escape. • To ensure that all the door access

	staff is fully and well prepared to properly serve customers before the start of every shift, and at the start and end of every performance. • To ensure that the inside of the auditoriums are patrolled accordingly to ensure memorable escape for our customers.
Elements	• Customer Access; • Customer flow; • Uniforms; • Customer services; • Look and feel of the door access control point; • Shift readiness; and, • In-cinemas
Status	• Ongoing
Brand identity elements	• Organisational attributes
Type of brand benefit	• Sensory benefit, to customers, - image of the brand
Brand value	• User satisfaction i.e., customers are satisfied with the look and feel or image of the cinema surroundings.
Brand equity driver	• Value to customer - Imagery

According to management, although this area has improved, it is only considered to be satisfactory and not ideal. The reasons have been identified, but once again could not be published due to the nature of the content.

NAME OF THE PROJECT / INITIATIVE	CLEANING
Objectives	• The main objective of the task pack is to that cinemas are always clean and hygienic at all times, this ensuring a memorable escape for our customers. • The objective of this intervention is to ensure that every cleaning staff is always in full uniform. • The objective of this intervention is to ensure that the Cinema Complex foyer is always clean, tidy and hygienic. • The objective of this intervention is to ensure that the inside of the Cinemas is always clean, tidy and hygienic. • The objective of this intervention is to ensure that the administration offices are always clean, tidy and hygienic. • The objective of this intervention is to ensure that the Store Rooms are always clean, tidy and hygienic. • The objective of this intervention is to ensure that the kitchen is always clean,

	tidy and hygienic • The objective of this intervention is to ensure that the Toilets are always clean, tidy and hygienic. • The objective of this intervention is to ensure that the Catering Equipment is always clean and hygienic. • The objective of this intervention is to ensure that all equipment is always clean, tidy, and dust free. • The objective of this intervention is to ensure that box office area is always clean, tidy, and dust free.
Elements	• Uniforms • Foyer • In Cinema • Toilets • Administration office • Store rooms • Kitchens • Catering equipment • Other equipment
Status	• Ongoing
Brand identity elements	• Organisational attributes
Type of brand benefit	• Sensory benefit, to customers, - image of the brand

Brand value	• User satisfaction i.e., customers are satisfied with the look and feel or image of the cinema surroundings.
Brand equity driver	• Value to customer—Imagery

Management has indicated that they were satisfied with the results although additional improvement was required.

NAME OF THE PROJECT / INITIATIVE	SELF SERVICE TERMINALS (SSTS)
Objectives	• Improved customer service and speed.
Status	• Implemented
Brand identity elements	• Quality / Value
Type of brand benefit	• Functional benefit to customers—the service efficiency of the brand.
Brand value	• Competitive Advantage and Trade Leverage.
Brand equity driver	• Value to customer—Performance

This is the first intervention to overcome the challenge that staff highlighted in Chapter 2, while at the same time providing a step change in customer experience. According to the company, the competition will take a minimum of three years to duplicate the system. This medium has proven to be well received, according to management. Actual utilisation could not be published.

NAME OF THE PROJECT / INITIATIVE	G2G - BOX OFFICE QUEUE TIME INTERVENTION
Objectives	• To ensure that no customers wait for longer than 3 minutes and 30 seconds at box office, at any cinema and at any time. • The objective of staggering is to achieve an even flow of customers through the cinema during every performance. • To achieve a smooth and uninterrupted flow of customers by optimising performance at the Box Office Area. • To ensure that screens are not turned and thus achieving a maximum box office queue time of 3 minutes and 30 seconds is achieved. • To ensure that the surveillance system is administered and implemented effectively to achieve CPP, cost of sales, hygiene and service standards. • To assist customers in making a decision about what film to chose before reaching the Box Office Cashier, by providing accurate and visible information (e.g., starting

	times; age restrictions; sold outs; no complimentaries; warnings etc). • To provide customers with appropriate information to assist in making a decision about what film to chose. • To ensure that all the Box Office equipment is functioning properly at all times. • To ensure that every Box Office staff member is in full, proper and clean uniforms at all times. • To ensure that all the Box Office staff is fully and well prepared to properly serve customers before the start of every shift. • To ensure that we have supplied accurate information timeously in order to inform management on progress made and obtained assistance when required.
Elements	• Measurements and data collection. • COR (rostering). • Seating plans (keeping the screens straight). • Average transaction times. • Queue management. • Management presence.

	• Staggering (Stagger Master). • Surveillance. • Show Times • Poster boxes. • Motion Picture information. • Queuing systems. • Equipment (including Ticket-line). • Reinstatements. • Uniforms. • Coaching (CBMT pass). • Shift preparation (including Ticket-line).
Status	• Ongoing
Brand identity elements	• Quality / Value
Type of brand benefit	• Functional benefit to customers—the service efficiency of the brand
Brand value	• Competitive Advantage, i.e., more competitive because of the efficiencies, and Trade Leverage, i.e., trading better, because of efficiencies.
Brand equity driver	• Value to customer—Performance

Identified as being a major reason for a film theatre receiving a negative rating, this initiative is aimed at improving customer service. The intervention has reduced queue times, but according to management, has not reached its stated objective; concerns have also been raised about its sustainability. This process is to be automated, controlled and measured regularly. This will include the standardised scheduling of show times and the requisite number of staff per show time in order to minimise queues. This will take place in real-time. Once again, due to issues of confidentiality, the reasons could not be published.

NAME OF THE PROJECT / INITIATIVE	G2G – PROJECTION INTERVENTION
Objectives	• To ensure magical customer cinema experience through perfect presentation. • to ensure that the product is ready for perfect presentation as expected, • To ensure perfect presentation • To ensure that all projection booths adhere to the projection booth standards. • To ensure that every projectionist staff is in full uniform. • To ensure that assets and product is fully secured at all times. • To ensure that my cinema fully adheres to all projection related processes, rules and standards.
Elements	• Preparing the product • Making up of support programmes • Making up of the feature film • Completing the film report, incl.

	supporting programme. • Perfect presentation of the product • Aperture plates • Masking • Screens • Sound • Secure projector to the floor, if there is movement. • Cinema and in-cinema inspections • Foyer inspection • Air-conditioning inspection • Toilet inspection • Fire inspection • Auditorium inspection • Perfect presentation inspection • Adherence to the projection booth standards • Uniforms • Standardizing the current content. • Security • Safety of assets • Safety of the product • Preventing piracy (NATO Procedure)
Status	• Ongoing
Brand identity elements	• Quality / Value

Type of brand benefit	▪ Functional benefit to customers—the service quality of the brand.
Brand value	▪ Use satisfaction, i.e., customers are more satisfied because of the better quality of projection and sound
Brand equity driver	▪ Value to customer—Performance

Understanding the customer journey is probably the most important intervention. The quality of picture and sound are central to the overall experience, which is intended to transport a person across time and space and evoke a number of senses. According to senior management this has been the most problematic to turnaround. The reasons could not be divulged, again due to issues of confidentiality. Management have indicated that several further interventions are planned to ensure their objectives are met.

NAME OF THE PROJECT / INITIATIVE	FACILITIES MANAGEMENT
Objectives	• To provide complexes with a single contact point for services and facilities maintenance. • To support the brand promise of a memorable escape, by offering the following benefits: • A one-stop-shop, which enables the cinema manager to focus on customers. • Ability for accurate future planning. • The service desk consultant will follow-up on behalf of the manager, therefore the manager does not need to call technicians to follow up on a query. • The manager is required to quality control the service provided by technicians and external suppliers by validating the call after the technicians have fixed the problem. This will ensure that the company keeps track of the quality of technicians and the productivity of external suppliers. • Facilities management will enable effective tracking of spend • Facilities management will enable

	managers to accurately analyze spend. • Facilities management will enable efficiency of suppliers • Facilities management will minimize down time: • Equipment down-time • Show down-time • Service, for example, ticket-line down-time.
Status	• Ongoing
Brand identity elements	• Quality / Value
Type of brand benefit	• Functional benefit to the company—efficiencies of the brand.
Brand value	• Competitive Advantage, i.e., more competitive because of the efficiencies, and Trade Leverage, i.e., trading better, because of efficiencies.
Brand equity driver	• Value to company—Performance

This intervention is not fully implemented, but for the areas utilising the facilities management tools, senior management feels that it is already yielding positive results. The link to the experience or escape has been defined as providing support to cinema management and shares the burden of daily infrastructure and IT related tasks and incidences. This will allow the cinema manger to focus on her/his internal and external customers.

NAME OF THE PROJECT / INITIATIVE	SCHEDULING – CENTRALIZATION, TIME & ATTENDANCE
Objectives	• Customers have accurate information in respect of show times. • Staff are scheduled effectively to ensure attainment of stated queue lengths • Staffing cost control
Status	• Piloting
Brand identity elements	• Quality / Value
Type of brand benefit	• Functional benefit to the company—efficiencies of the brand.
Brand value	• Competitive Advantage, i.e., more competitive because of the efficiencies, and Trade Leverage, i.e., trading better, because of efficiencies.
Brand equity driver	• Value to company—Performance

This was addressed under queue times. No additional information was available.

NAME OF THE PROJECT / INITIATIVE	UPGRADE SATELLITE (RTT) DISPATCH SYSTEM
Main aim	• To update the system on RTTs dispatch to confirm the weight of the parcel handed to them from SKHE dispatch.
Objectives	• Improve service level • Control costs
Status	• Ongoing
Brand identity elements	• Quality / Value
Type of brand benefit	• Functional benefit to the company—efficiencies of the brand
Brand value	• Competitive Advantage, i.e., more competitive because of the efficiencies, and Trade Leverage, i.e., trading better, because of efficiencies.
Brand equity driver	• Value to company - Performance

No additional information was available.

NAME OF THE PROJECT / INITIATIVE	EXTEND SIZE OF DISTRIBUTION CENTRE
Objectives	• To adequately cater for volumes and new product ranges and sizes
Status	• Ongoing
Brand identity elements	• Quality / Value
Type of brand benefit	• Functional benefit` to the company—efficiencies of the brand.
Brand value	• Competitive Advantage, i.e., more competitive because of the efficiencies, and Trade Leverage, i.e., trading better, because of efficiencies.
Brand equity driver	• Value to company—Performance

No additional information available.

NAME OF THE PROJECT / INITIATIVE	GLAMOROUS CINEMAS
Objectives	• To ensure the cinema look and feel supports the Glamour strategy.
Elements	• Ticket-line • Plasma Screens • Poster Boxes • Signage, including SKT logo, menu boards

	• Self Service Terminals • Competition Boxes • Promo material by site—list from Ops • Internal information signage
Status	• On-going
Type of brand benefit	• Emotional and sensory benefit to customers—customers are happy with how SKT brand looks and feel—image of the brand
Brand value	• User satisfaction i.e., customers are satisfied with the look and feel or image of the cinema surroundings.
Brand equity driver	• Value to customer—Imagery

There are three cinemas that have the new look and feel. All sites have shown strong customer support and are considered extremely profitable. The actual results could not however be published, due to restrictions imposed by senior Ster-Kinekor management. According to management this is a significant step in the pursuit of "Glamour." Another significant step is the introduction of new look and feel seating at the Four Ways Mall. Seating features include a headrest, individual armrests, lumbar support and the provision of a table for concessions. According to the cinema manager this has been well received and numerous compliments have been received from the viewing public.

NAME OF THE PROJECT / INITIATIVE	SIGNAGE – MENU BOARDS
Objectives	• Improved perception of quality and range
Status	• Partially complete
Brand identity elements	• Visual images
Type of brand benefit	• Emotional and sensory benefit to customers—customers are happy with how SKT brand looks and feel—image of the brand
Brand value	• User satisfaction i.e., customers are satisfied with the look and feel or image of the cinema surroundings.
Brand equity driver	• Value to customer—Imagery

This is a phased rollout and the project is on target. The menu boards have been well received and have contributed to increasing the perceived value of the concessions.

NAME OF THE PROJECT / INITIATIVE	SIGNAGE - SKT LOGO
Main aim	• To modernise the SK logo
Objectives	• Customers perceive the brand to be glamorous
Status	• Ongoing
Brand identity elements	• Personality
Type of brand benefit	• Emotional and sensory benefit to

	customers—customers are happy with how SKT brand looks and feel—image of the brand
Brand value	• User satisfaction i.e., customers are satisfied with the look and feel or image of the cinema surroundings.
Brand equity driver	• Value to customer—Imagery

According to management this is a phased rollout and is considered to be on track.

NAME OF THE PROJECT / INITIATIVE	NEW UNIFORM LOOK AND FEEL
Objectives	• Customers perceive the brand to be glamorous
Status	• Complete
Brand identity elements	• Organisational attributes
Type of brand benefit	• Sensory benefit, to customers—image of the brand
Brand value	• Use satisfaction i.e., customers are satisfied with the "image" of the people that are serving them.
Brand equity driver	• Value to customer—Imagery

The uniforms support the objective of Glamour and have been well received by staff and cinema management alike.

NAME OF THE PROJECT / INITIATIVE	GLAMOUR – PLASMA SCREENS
Objectives	• To reduce perceived burden of queuing, by creating a distraction.
Status	• On target
Brand identity elements	• Organisational attributes
Type of brand benefit	• Sensory benefit, to customers—image of the brand
Brand value	• User satisfaction i.e., customers are satisfied with the look and feel or image of the cinema surroundings.
Brand equity driver	• Value to customer—Imagery

No additional information available.

NAME OF THE PROJECT / INITIATIVE	VORTO
Objectives	• Reduce queue times
Status	• Complete
Brand identity elements	• Quality / Value
Type of brand benefit	• Functional benefit to customers—the service efficiency of the brand.
Brand value	• User satisfaction i.e., customers are more satisfied because of the efficiencies.
Brand equity driver	• Value to both customer and company—Performance

This initiative has been well received by internal and external customers. It spawned the introduction of the self service terminals, which is a first in South Africa.

NAME OF THE PROJECT / INITIATIVE	NEW DEVELOPMENTS WITHIN SOUTH AFRICA, E.G. WONDER –PARK.
Objectives	• To be the largest cinema entertainment provider in Africa • To build new cinemas in certain South Africa
Elements	• Identify potential market • Research feasibility and viability • Build

Status	• On-going
Brand identity elements	• Local versus global
Type of brand benefit	• Choice benefit to customers—they have more film houses to choose from.
Brand value	• Competitive Advantage, i.e. more competitive because of a larger footprint within South Africa, due to the brand builds , and Trade Leverage, i.e., trading better, i.e. trading better because of a larger footprint within South Africa
Brand equity driver	• Increased footprint, enhance leadership position.

In line with the strategy of improving cinema access to middle class South Africa, the majority of whom are the black consumer market, thus site is close to Soshanguve. This dynamic is reflected in the customer mix.

NAME OF THE PROJECT / INITIATIVE	MOVIE CLUB
Objectives	• To increase and sustain SKF brand equity • To increase attendance frequency from our customers.
Elements	• Converting non-member customers to club members

	• Rewarding customers. • Communicating to customers
Status	• Ongoing
Brand identity elements	• Movie scheme programmes
Type of brand benefit	• Relationship benefit—customer loyalty to the brand
Brand value	• Brand loyalty, i.e., customers are more loyal to the brand because of the film club benefits
Brand equity driver	• Value to company—Resonance

This is primarily a frequency driver and while the size of the base cannot be disclosed, it is significant.

NAME OF THE PROJECT / INITIATIVE	VITALITY
Objectives	• To increase and sustain SKF brand equity • To increase attendance frequency from our customers
Elements	• Converting non-member customers to club members • Rewarding customers. • Communicating to customers
Status	• Ongoing

Brand identity elements	• Movie scheme programmes
Type of brand benefit	• Relationship benefit—customer loyalty to the brand
Brand value	• Brand loyalty, i.e., customers are more loyal to the brand because of the vitality club benefits
Brand equity driver	• Value to company—Resonance

This strategic association has grown the base of customers and increased their frequency. Once again, the statistics cannot be disclosed, but are significant.

NAME OF THE PROJECT / INITIATIVE	60 + FILM CLUB MEMBERSHIP
Objectives	• To increase and sustain SKF brand equity • To increase attendance frequency from our customers
Elements	• Converting non-member customers to club members • Rewarding customers. • Communicating to customers
Status	• Ongoing
Brand identity elements	• Movie scheme programmes
Type of brand benefit	• Relationship benefit—customer loyalty to the brand
Brand value	• Brand loyalty, i.e. customers are more loyal to the brand because of the 60 + film club benefits
Brand equity driver	• Value to company—Resonance

No additional information could be obtained.

NAME OF THE PROJECT / INITIATIVE	CAST A CRITIC
Objectives	• To create a competition whose ultimate aim is to find a credible black film critic that will become a permanent feature on Metro FM, by

	the end of September 2004. • To get the public involved in the selection process, so a build that credibility and give the public ownership of what they create. • To have placed the winner of the competition in a position from where her/she will feed the public with information and her/his opinion on motion pictures.
Elements	• Media partners • Finances • Logistics • Entries – pre-promo selection • Pre-promo & launch • Selection • Selection panel • Bootcamp • Winner announcement event • Media partners • Finances • Logistics
Status	• Completed
Brand identity elements	• Media campaigns
Type of brand benefit	• Knowledge benefit to customers—identity of the brand

Brand value	• Customers ability to interpret / process information about movies
Brand equity driver	• Value to customer—Salience

This supports the drive into the black consumer market and from a best practice perspective it is viewed as ensuring all the elements that made the industry successful within the white consumer market have been implemented for the black consumer market.

NAME OF THE PROJECT / INITIATIVE	RANK T.V. ADVERTISING
Main aim	• To grow and sustain the number of black customers coming to cinemas
Objectives	• To increase product awareness among black customers. • To increase SKF brand awareness among black customers.
Status	• Ongoing
Brand identity elements	• Media campaigns
Type of brand benefit	• Knowledge benefit to customers—identity of the brand
Brand value	• Customers ability to interpret / process information about movies
Brand equity driver	• Value to customer—Salience

No additional information available.

NAME OF THE PROJECT / INITIATIVE	SKT IN ISIDINGO
Main aim	• To grow and sustain the number of black customers coming to cinemas
Objectives	• To increase product awareness among black customers. • To increase SKF brand awareness among black customers.
Elements	• Mentions of Ster-Kinekor film titles on ad-hoc basis. • Branding • Product awareness
Status	• Ongoing
Brand identity elements	• Media campaigns
Type of brand benefit	• Knowledge benefit to customers—identity of the brand
Brand value	• Customers ability to interpret / process information about movies, and or what film exhibitor to go to
Brand equity driver	• Value to customer—Salience

No additional information available.

Name of the project / initiative	O Magazine Girls Night out with Ster-Kinekor
Objectives	• To host monthly screenings for their readers.
Elements	• Only the best films are selected that are appropriate to this market. • Readers also enjoy "give-aways" and special gifts on the night. • Coke and popcorn is provided with our compliments. • This promotion is an excellent vehicle to sample cinema to emerging market customers for two reasons: • It is indirectly endorsed by Oprah • The magazine has a high penetration into the black consumer market.
Status	• Ongoing
Brand identity elements	• Media campaigns
Type of brand benefit	• Knowledge benefit to customers—identity of the brand.
Brand value	• Customers ability to interpret / process information about movies, and or what film exhibitor to go to
Brand equity driver	• Value to customer—Salience

No additional information available.

NAME OF THE PROJECT / INITIATIVE	"HOWZIT HOLLYWOOD 2005?"
Objectives	• To increase brand equity by "owning" the Oscars phenomenon in the market because that association reinforces the perception that Ster-Kinekor brings the best movies first. • To achieve a media value of 1:5 (hard cost) by running an a Oscar® screening campaign on SABC 1, a radio campaign and competition across 5FM, Metro FM and Good Hope FM radio stations. • To generate awareness of our ownership of the Oscars® through mass media. • To stimulate word-of-mouth for the Oscar® nominated films (the "smaller" films enjoy particular benefit here) • To reach the entire market spectrum hence the name of the campaign—Howzit Hollywood and capitalize on the equity around the Howzit Hollywood brand.
Elements	• A four-week (adult) screening campaign whereby the public could win tickets to pre-release screenings of Oscar® nominated films, driven

	predominantly through SABC 1. • A two-week (kids) screening campaign whereby kids could win tickets to pre-release screenings of Oscar® nominated films, driven predominantly through SABC 1's Yo-TV. • A radio competition enabling listeners the opportunity to win a trip to say "Howzit Hollywood" on 5FM, Metro FM and Good Hope FM. Each station had one ticket to give away. • The breakfast DJ's from the above three stations were sent to Hollywood in the week leading up to the Awards, doing live crossing reporting back on the excitement in Hollywood and then attended the Oscars®. • A Howzit Hollywood DVD Box set retailed through Ster-Kinekor Home Entertainment. • A Howzit Hollywood Coke and Popcorn combo, available at all Ster-Kinekor cinemas, with a competition on the box, offering the above DVD box sets as prizes. • Various smaller competitions through print media, predominantly driven through Heat Magazine.

	• A grand final event, the Premiere of Vanity Fair and an after-party which showcased the return of our DJ's from Hollywood and included a young talent driven haute couture fashion show.
Status	• Ongoing
Brand identity elements	• Special Promotional Campaigns
Type of brand benefit	• Knowledge benefit to customer—about identity of the brand
Brand value	• Customers ability to interpret / process information about movies, and or what film exhibitor to go to
Brand equity driver	• Value to customer—Salience

No additional information available.

NAME OF THE PROJECT / INITIATIVE	BLACK MARKET AD SPEND
Objectives	• To grow and sustain the number of black customers coming to cinemas • To increase the amount of money spent in advertising movies to the black market. • To raise product awareness in the Black market
Elements	• Product and brand awareness in all relevant media.
Status	• Ongoing
Brand identity elements	• Special Promotional Campaigns
Type of brand benefit	• Knowledge benefit to customers—identity of the brand
Brand value	• Customers ability to interpret / process information about movies
Brand equity driver	• Value to customer—Salience

Media spend traditionally focused on the white consumer market. To illustrate, on national television, advertising was mainly flighted on SABC 3 and MNet/DSTV. The organisation focussed on encouraging distributors of films to increase spends to include SABC 1 and 2. The same principle was applied to print and radio.

NAME OF THE PROJECT / INITIATIVE	CSI – VISION MISSION
Objectives	• To bring Ster-Kinekor's Corporate Social Investment initiatives to the youth in underprivileged communities by identifying and helping those with visual problems. • Identify learners with preventable vision related problems • Identify learners requiring glasses • Distributing glasses to learners requiring glasses
Elements	• Selection of schools • Selection of learners • Screening and testing of learners • Dispensing of glasses
Status	• Ongoing
Brand identity elements	• Other campaigns
Type of brand benefit	• Relationship benefit—a mutually beneficial relationship between customers and the brand (community engagement)
Brand value	• Brand loyalty
Brand equity driver	• Value to customer—Resonance

No additional information available.

NAME OF THE PROJECT / INITIATIVE	NACHOS PROJECT
Objectives	• To increase catering product scope / offerings, that customer can choose from.
Status	• Implementing
Brand identity elements	• Catering offerings
Type of brand benefit	• Choice benefit to customers—they have more catering choices to choose from.
Brand value	• Confidence in purchasing decisions i.e., deciding on the "right" catering offering
Brand equity driver	• Value to customer—Performance

The objective of increasing the scope of product is ongoing as new trends in the market present themselves. The initiatives that follow echo this statement. No information was made available on the success of these interventions due to issues of confidentiality.

NAME OF THE PROJECT / INITIATIVE	PIES PROJECT
Objectives	• To increase catering product scope / offerings, that customer can choose from.
Status	• Pilot phase
Brand identity elements	• Catering offerings
Type of brand benefit	• Choice benefit to customers—they have more catering choices to choose from.
Brand value	• Confidence in purchasing decisions deciding on the "right" catering offering
Brand equity driver	• Value to customer—Performance

No additional information could be obtained.

NAME OF THE PROJECT / INITIATIVE	COFFEE PROJECT
Main aim	• To offer customers choice
Objectives	• To increase catering product scope / offerings, that customer can choose from.
Status	• Conceptual phase
Brand identity elements	• High quality product and packaging
Type of brand benefit	• Improved value perception—choice

	and quality
Brand value	• Confidence in purchasing decisions deciding on the "right" catering offering.
Brand equity driver	• Value to Customer

No additional information could be obtained.

NAME OF THE PROJECT / INITIATIVE	**COMBOS E.G., MENTOS COMBOS**
Objectives	• Improve Catering Sales • To create affordable combos in order to get customers to buy Popcorn, Coke and a sweet.
Status	• Ongoing
Brand identity elements	• Catering offerings
Type of brand benefit	• Choice benefit to customers—they have more catering choices to choose from.
Brand value	• Confidence in purchasing decisions deciding on the "right" catering offering
Brand equity driver	• Value to customer—Performance

NAME OF THE PROJECT / INITIATIVE	POPCORN IN PACKETS
Objectives	• To improve Catering Sales • To create cheaper combos for these cinemas in order to push catering sales.
Status	• On-going
Brand identity elements	• Catering offerings
Type of brand benefit	• Functional benefit
Brand value	• Confidence in purchasing decisions deciding on the “right” catering offering
Brand equity driver	• Value to customer—Performance

No additional information could be obtained.

4.4. Conclusion

This chapter highlighted a number of interventions intended to improve customer experience and is the basis of the organisations strategy for enhancing the brand image and perceived value of the brand. Ster-Kinekor intends to “de-risk” going to the movies and raise awareness of the brand through elements of self promotion (on plasma screens), but primarily through a “Glamorous Experience.” Chapter 5 will review the results of the 800 interviews and interpret the customer’s reaction to their strategy.

CHAPTER 5

PRESENTATION OF RESEARCH

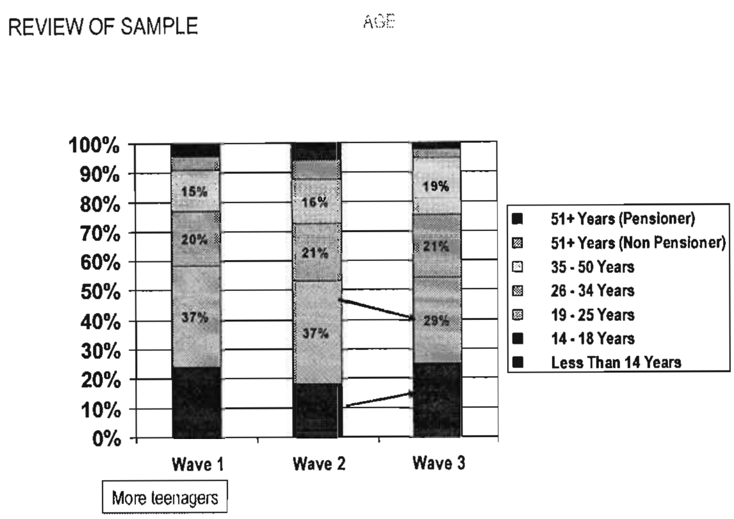
5. Introduction

In the previous chapter a brief history of Ster-Kinekor was presented. The chapter included the interventions embarked on by Ster-Kinekor to deliver on its brand promise. In this chapter the research findings are presented. The main objective of the research was to establish whether the strategy embarked on by Ster-Kinekor will deliver more attendances. The strategy is based on implementing best practice and thereby repositioning the brand. Ster-Kinekor view is that this will enhance the perception of the brand and improve the consumer experience of going to the movies.

5.1 Research Findings

The research findings have been categorised and presented graphically with interpretations offered upon each graph. The need for confidentiality has limited comment on some of the findings.

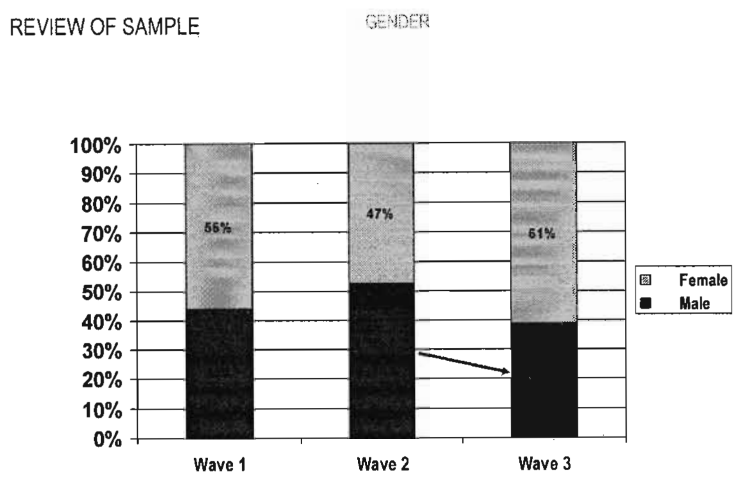
5.1.1. Review of Sample



Wave 1 2004
Wave 2 2004
Wave 3 2005

The latest market research shows relatively more teenagers attending, and a shrinking proportion of young adults aged between 19-25 years. The growth of teenage movie goers is limited to Junction[1] and Classic cinemas, whereas at Nouveau, the reverse is happening with more young adults attending.

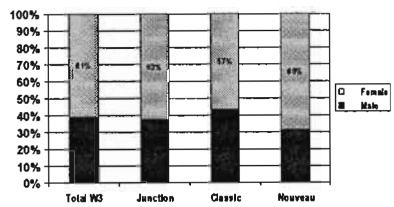
[1] Ster-Kinekor Theatres have three chains; Classic (13 cinemas), Junction (27 cinemas) and Nouveau (5 cinemas). Current ticket prices are R38 at Classic; R14 at 22 Junction cinemas, R19 at 5 Junction cinemas and R38 at Nouveau. Discount schemes at all cinemas are applicable, these include half-price Tuesdays, children, senior citizens and a vitality linked scheme.



The change in gender proportions is important, and most noticeable at Nouveau. An increased interest in film-going especially among females would seem to be in evidence. This has been double checked with the field-force to clarify whether males were less willing to be interviewed, but this was not especially noted, although there was some observation of females in couples being more willing to volunteer to do the interview!

REVIEW OF SAMPLE

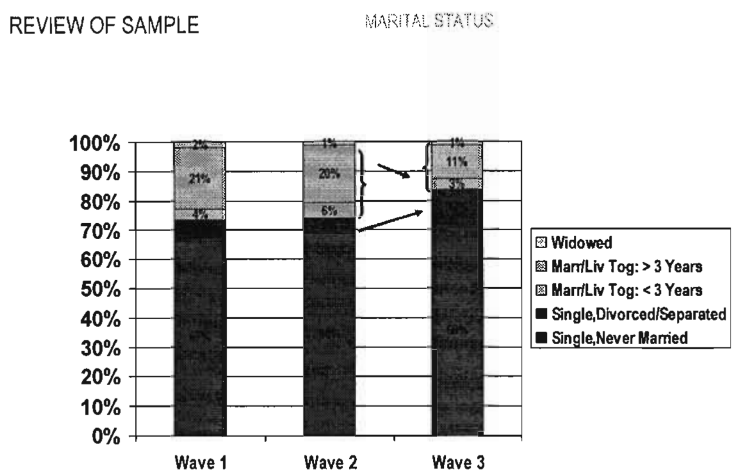
GENDER- WAVE 3 BRANDS



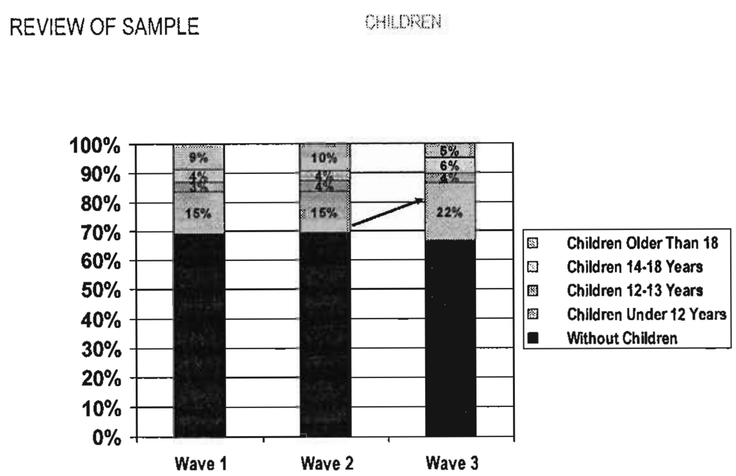
Accompanied Respondent	Total	Male	Female
Friends	40.20%	42.40%	38.70%
Alone	21.60%	26.70%	18.30%
Partner/Spouse	16.10%	19.40%	14.10%
Other Family	14.70%	11.10%	17.10%
Children	12.20%	4.60%	17.10%

Slightly more men interviewed attended the cinema with their spouse or partner. This means that the increased overall proportion of females in the sample cannot be attributed to couples where the female elected to take the interview rather than the male.

It can be seen that female respondents are less likely (than average) to be going to film theatres alone (although a significant group still do), and relatively more likely to be attending with children and other family members at Junction and Classic, but with friends at Nouveau. Relatively more males attend alone, although attendance with friends or spouse is still very high.

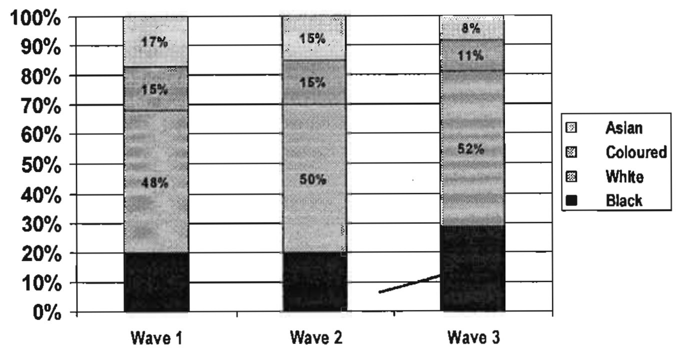


The total proportion of all single people has grown; real growth coming from previously married people who have come back to the market. Interestingly, there is no significant variation between the brands in this respect. It is noted that overall, a higher proportion of males (77%) in the sample were single (never married) compared to females (67%), and a higher proportion of females (15%) were previously married compared to males (11%).

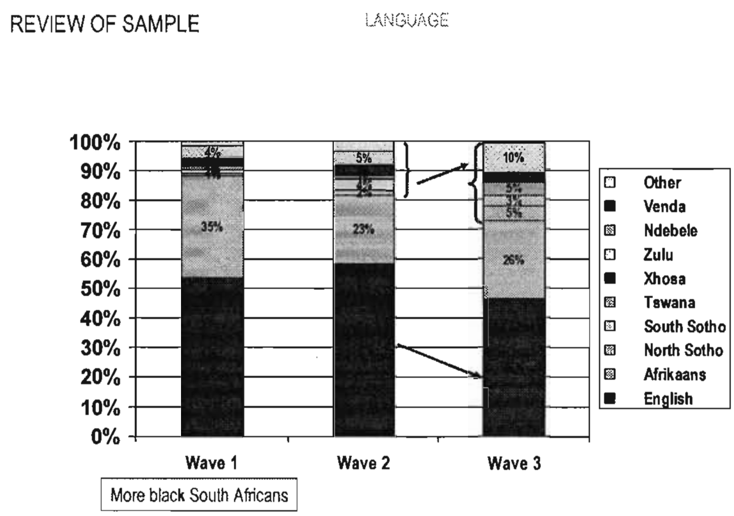


It can be assumed that the increased attendance with younger children is probably linked to lower ticket prices. However, due to the quality of films screened (e.g., Shrek 2 and Spiderman) the higher-priced Classic cinemas also show growth in this segment.

REVIEW OF SAMPLE RACE

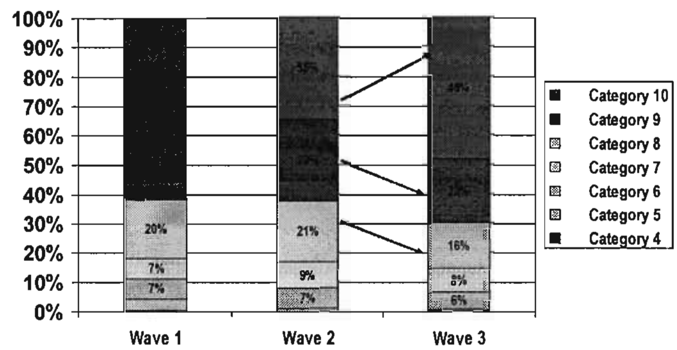


There is a pleasing increase in attendance by Black South Africans, which was one of the objectives behind the strategy when the new Junction brand was launched. The Classic profile has remained almost identical to the previous wave. The black consumer market has increased by 29%.



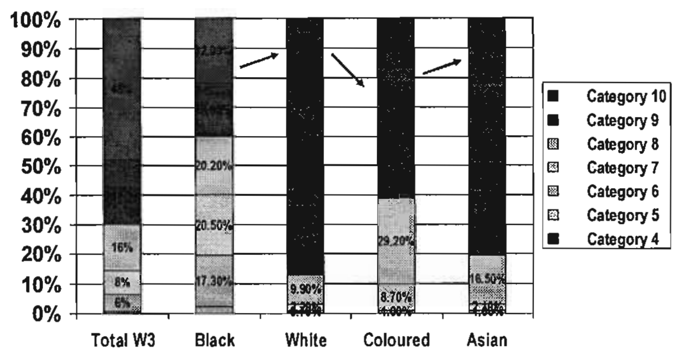
This data supports the comments made previously.

REVIEW OF SAMPLE LSM

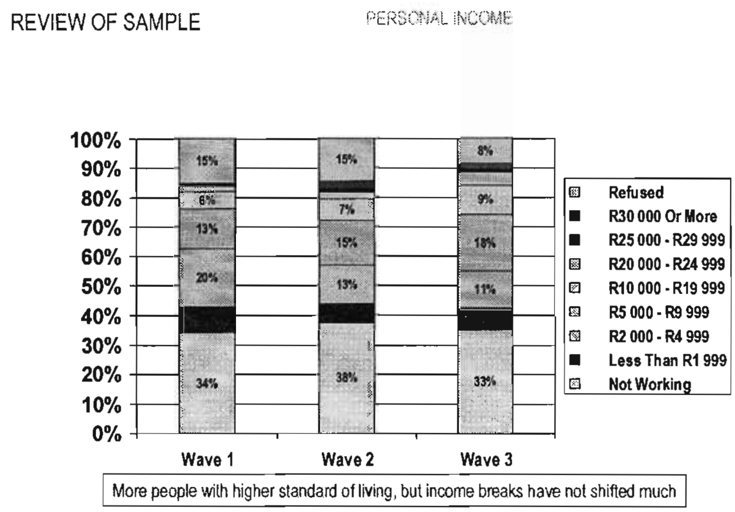


In the light of the dramatic change in ticket prices, it is interesting that the Living Standards Measure (LSM) profile of the sample shows a very large increase at the top end of the continuum. The results show a slightly higher proportion of individuals from lower LSM households attending Junction cinemas.

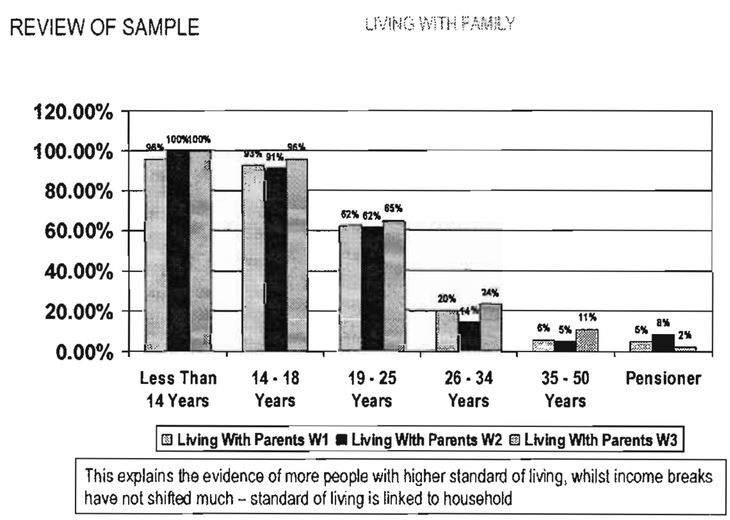
REVIEW OF SAMPLE LSM – BY RACE



As would be expected, there are far more LSM 10's amongst white respondents, whereas just over 60% of the black respondents are in LSM 8 or higher. In all race groups, the LSM distribution of cinema-goers is skewed towards the higher LSMs, when compared to the population as a whole (as measured by AMPS), but the difference is far more extreme among blacks.

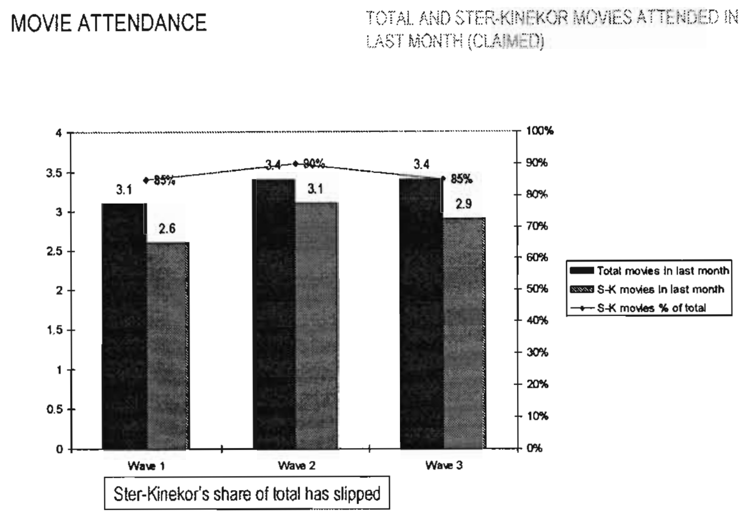


While more people in higher LSMs are attending, this does not mean that personal income levels have shifted accordingly. Proportions of income groups remain relatively consistent across the waves, although the spread does differ somewhat across brands in Wave 3. Nouveau cinemas include far fewer non-working people, and more people at the top end of the scale. Junction cinemas show more people at lower income levels and Classic cinemas are weighted in the middle.



Since the LSM has shifted more than income overall, further investigation was warranted. The data shows that more young people continue to live at home than before. While their overall standard of living might be higher than would be predicted by their personal disposable income, other parties contribute to the costs of the household.

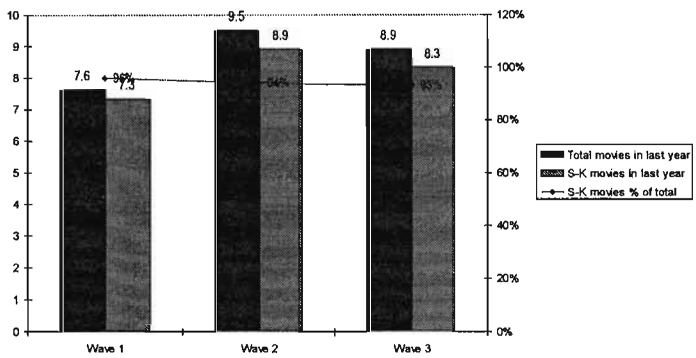
5.1.2. Movie Attendance



The data here reveals reported/recalled number of motion pictures attended in the last month. When respondents were asked how many films they think they have attended in the last month, the average has remained consistent, but the proportion claimed to be at Ster-Kinekor has slipped slightly. This reduced share comes from respondents at Junction cinema sites

MOVIE ATTENDANCE

TOTAL AND STER-KINEKOR MOVIES ATTENDED IN LAST YEAR (CLAIMED)

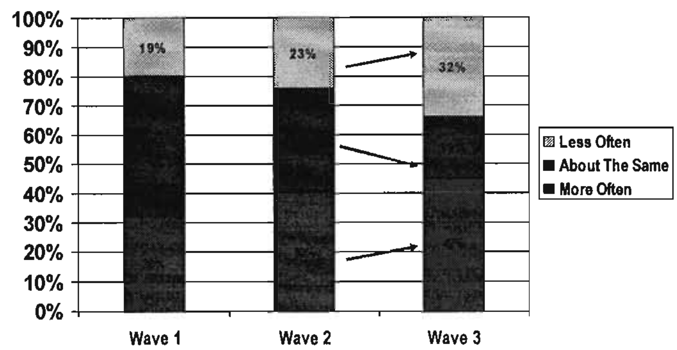


Ster-Kinekor's share of total has remained constant, but overall reported attendance has slipped

When asked to recall attendance over the last year, the average reported number has decreased somewhat since the last wave, but the Ster-Kinekor market share has remained at the same level, this proportion remaining fairly consistent across all brands. Since the information here and on the previous page is based solely upon recall, it is suggested that the attendance figures at Ster-Kinekor cinemas be used as a baseline, in order to estimate share of total.

MOVIE ATTENDANCE

REPORTED SHIFT IN BEHAVIOUR – HOW THEY BELIEVE THEIR ATTENDANCE HAS CHANGED



More change than before, but both in the "more often" and "less often"

Respondents were asked if they thought they were attending movies more or less often than in the past. Irrespective of the results of the comparison of the claimed number of movies seen across waves, a number of the respondents in the latest wave believe that they attended movies more often than in the past. Interestingly the number of people saying they have been less often has also increased.

MOVIE ATTENDANCE

REASON FOR REPORTED INCREASE IN ATTENDANCE

Reason For Increased Attendance Frequency	Wave 1	Wave 2	Wave 3
Movie ticket prices decreased	0%	0%	34%
More Time/Less Busy	28%	27%	25%
Better Variety	15%	16%	22%
Convenient	16%	21%	21%
Enjoy The Experience	22%	19%	20%
Can afford to go more often	0%	0%	20%
Sociable	12%	14%	17%
Discovery movie club member	14%	16%	9%
Ster-Kinekor club member	8%	12%	8%
Change in work schedule	6%	9%	7%
Family/friends influence	0%	0%	4%

Pricing drives increased attendance, but this is still supported by other aspects such as perceived time availability, convenient and movie offering/experience

Respondents were asked to say why their movie attendance had changed. Responses were unprompted, but captured on a pre-coded list to facilitate easy tracking. Unsurprisingly, the reduced ticket price/being able to afford going more often were the most frequent answers. However, this reason does not completely dominate the picture, and comments relating to the movie experience in totality emerge at significant levels. When reasons for each of the brands are examined, the pattern that emerges does support the desired brand positioning.

MOVIE ATTENDANCE

REASON FOR REPORTED DECREASE IN ATTENDANCE

Reason For Decreased Attendance Frequency	Wave 1	Wave 2	Wave 3
Less Time/Too Busy	44.10%	61.50%	60.50%
Too Expensive	44.60%	22.00%	18.30%
Prefer Alternative Entertainment	2.50%	9.90%	13.30%
Can no longer afford to go	0.00%	0.00%	11.70%
Prefer to rent movies	0.00%	0.00%	11.30%
Change In Schedule/Lifestyle	7.80%	14.30%	7.50%
Became a DSTv subscriber	0.00%	0.00%	6.90%
More choices on tv	9.30%	3.30%	6.10%
Movie isn't always showing	0.00%	0.00%	5.00%
Prefer to buy movies	0.00%	0.00%	4.80%
Busy with school work	0.00%	0.00%	3.80%

Alternative forms of entertainment, including movies at home are providing increased competition. Expense will always remain an issue for certain people, as life circumstances change

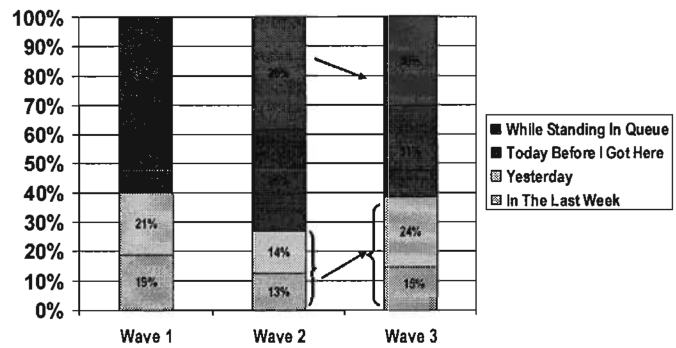
Changing lifestyles and life circumstances appear to largely affect reduced movie attendance, rather than negative movie/cinema related experiences. Movies and general TV viewing at home emerge as strong alternatives especially for Junction site respondents.

5.1.3. Movie Behaviour

Ster-Kinekor's own systems should be able to provide the total picture regarding trends in purchase channels, but in this sample, the self service terminal[2] has made an appearance at a significant level, most notably at Classic cinemas. Respondents at Nouveau cinemas show a notably higher use of the call centre.

[2] Ster-Kinekor has introduced self-service terminals. This is based on the banking industry's ATM concept. It allows the customer to purchase a ticket, choose their seats and pay with a debit, cheque or credit card.

MOVIE BEHAVIOUR WHEN MOVIE TITLE DECISION WAS REACHED

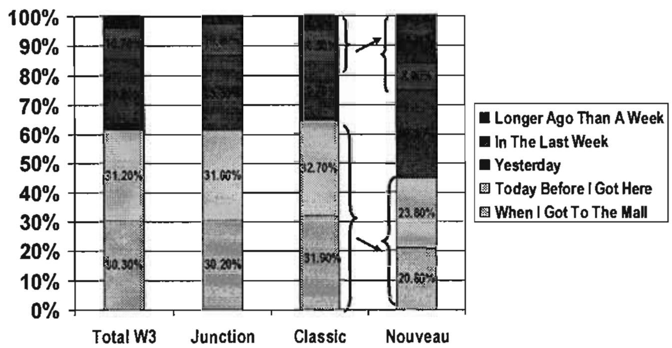


Decisions are being made more in advance than before, although same day and in the queue still dominate

The interviews also explored when people made decisions regarding their visit to the cinema. In previous waves this was limited to when the movie title decision was made, but the following two pages show how the area has been explored further in the current wave. Regarding movie title, most people do make the decision on the same day, although there is more evidence of more people deciding earlier.

MOVIE BEHAVIOUR

WHEN DECISION WAS REACHED TO GO TO THE MOVIES



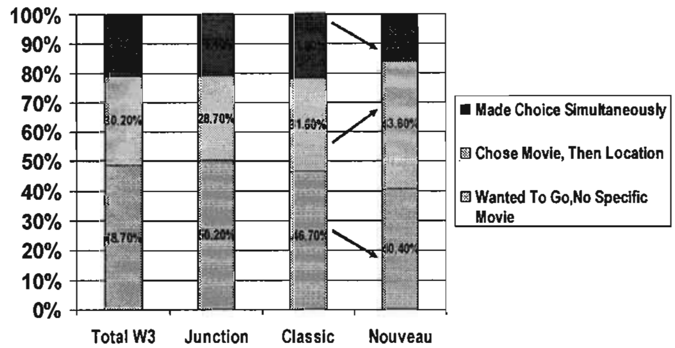
There is quite an even spread between "yesterday" through "today" to last minute "at the mall", with Nouveau respondents being the exception – more of them plan the event in advance

In this wave, the interview also explored when people made the initial decision that they wanted to see a movie at all. Most people decide on the actual day, or else the day before, rather than further in advance, although Nouveau site patrons are more likely to make the decision earlier. The different groups show a different pattern overall:

- For Junction cinemas, both the event and the title are quite last minute and spontaneous;
- For Classic cinemas, the timing of the event is also mostly spontaneous, but more than average have already decided what title they would like to see;
- For Nouveau cinemas, the movie "event" is planned more in advance, but the actual title decision comes later for many.

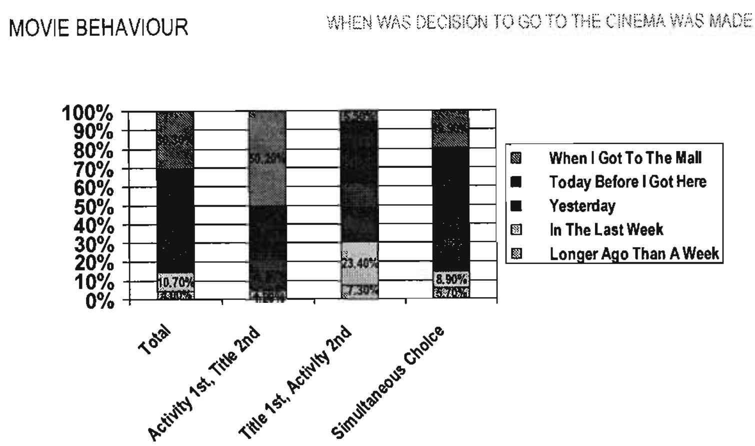
MOVIE BEHAVIOUR

ORDER IN WHICH MOVIE DECISIONS WERE MADE



Movie experience is the initial driver overall, rather than title

In the current wave a question was included regarding choice of generic activity first versus movie title. Both play an important role, but the more general desire to go to the cinema is stronger. Not surprisingly, Nouveau site patrons are different, with significantly more saying they are being attracted firstly by title. We know that many have actually reported that they decided to go to the movies a few days before, and only selected the title at the venue, but it is likely that the typical Nouveau site patron will opt to say that they chose the title of the film first. What is also probably happening is that some people have a title or shortlist of titles in mind, and then on a particular day, decide that they feel like seeing a movie. They then confirm the title on the day, or in the queue.

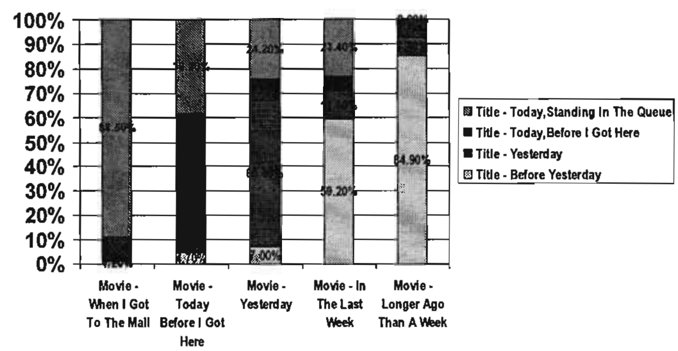


The claimed decision-making has been cross checked:

- People who simply feel like seeing a movie and choose the title afterwards are tending to do so quite spontaneously, on the actual day. They mostly are in the queue before the title is finalised;
- People attracted by a film title first (i.e. they have a mental short-list), have settled on the film title and then the activity anything from earlier that day to within the last week;
- People unable to separate out the order of decisions can make their decisions at any point, but primarily no more recently than the day before.

MOVIE BEHAVIOUR

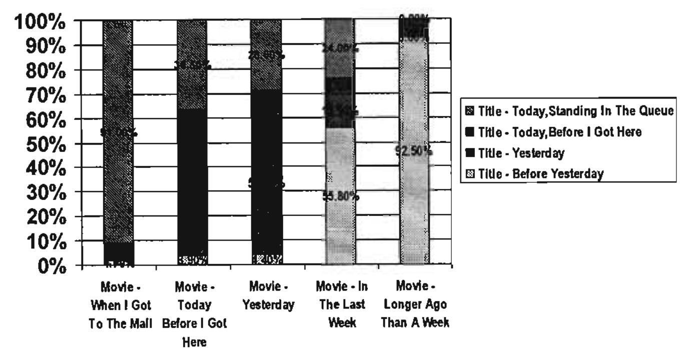
MOVIE ACTIVITY DECISION VS TITLE – WAVE 3



When responses on timing of activity and title are compared, there is a reasonable correlation in timing. On the whole, spontaneity of activity and film title co-exists, as does more forward planning. This pattern tends to be consistent across the brands, as shown on the next page.

MOVIE BEHAVIOUR

MOVIE ACTIVITY DECISION VS TITLE - JUNCTION

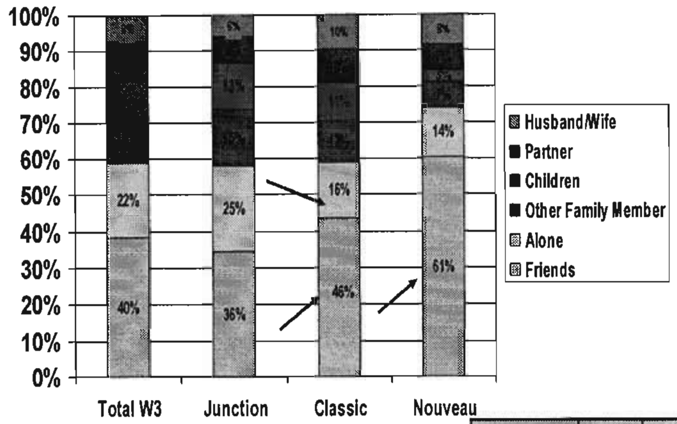


The type of groups attending the cinema has not shifted significantly overall, although relatively fewer people are reporting going with friends. There are notable differences between the brands. As a single group, friends are always most often mentioned, but:

- At Junction cinemas, rather fewer report going with friends, a significant proportion went alone and in family groups;
- At Classic cinemas, far more go with friends, far fewer alone, but the proportion of family groups is about the same as for Junction cinemas;
- At Nouveau cinemas, groups of friends largely dominate.

MOVIE BEHAVIOUR

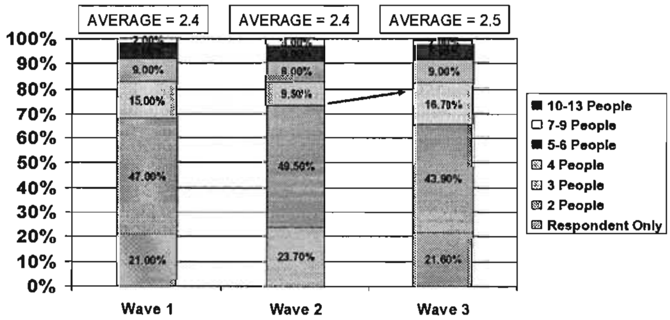
COMPOSITION OF PARTY – W3 BRANDS



Accompanied Respondent To Movies	Single Never Married	Single, Divorced/ Separated/ Widowed	Marr/Liv Tog < 3 Years	Marr/Liv Tog > 3 Years
Friends	51.90%	43.10%	14.40%	15.30%
Alone	22.40%	63.40%	11.70%	25.70%
Other Family Member	15.10%	4.00%	12.90%	86.10%
Children	1.60%	78.30%	18.90%	100.00%
Partner	10.40%	5.00%	10.50%	12.80%
Husband/Wife	0.00%	12.60%	38.90%	100.00%
Colleagues	0.40%	0.00%	0.00%	8.60%

MOVIE BEHAVIOUR

PARTY SIZE

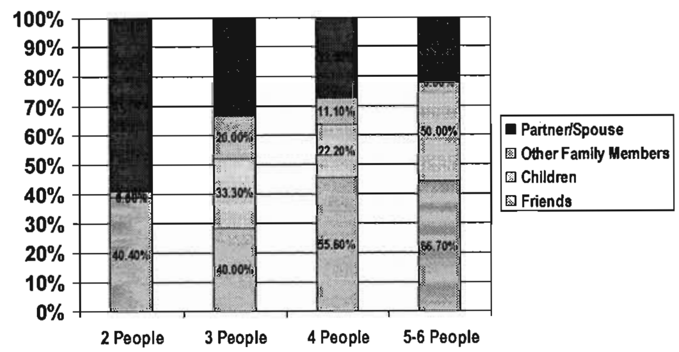


A very slight shift in average party size is observed

The average party size has increased, but not shifted greatly. It is interesting to note that the Classic cinemas show the largest party size.

MOVIE BEHAVIOUR

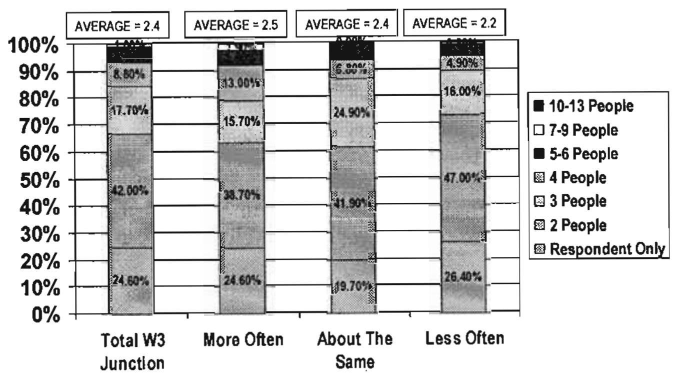
PARTY SIZE BY WHO ACCOMPANIED – WAVE 3



Further analyses into party size have been included for wave 3. The graph above compares party size with party composition. We have also investigated whether party size varies with shifts in attendance frequency, as shown below. People going more often or the same as before go in slightly larger groups than those going less often. This analysis has been run across the three brands and is shown on the following pages. In Classic and Nouveau cinemas, those people going at the same frequency as before show a slightly larger party size.

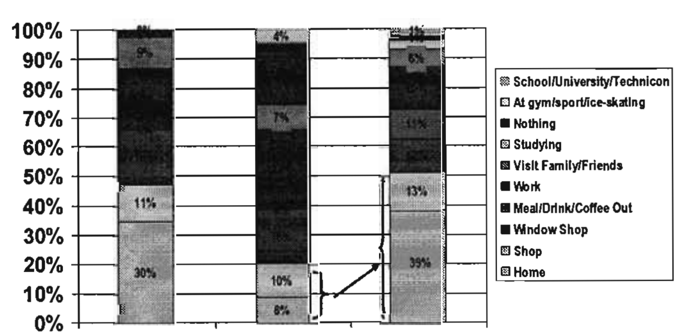
MOVIE BEHAVIOUR

PARTY SIZE BY PERCIEVED CHANGES IN ATTENDANCE FREQUENCY - JUNCTION



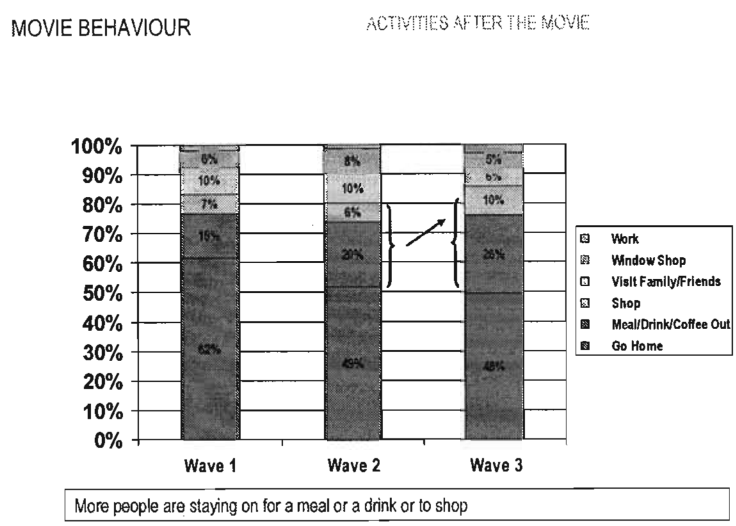
MOVIE BEHAVIOUR

ACTIVITIES BEFORE THE MOVIE



Straight from home or shopping is growing – less other "night out" activities precede movies

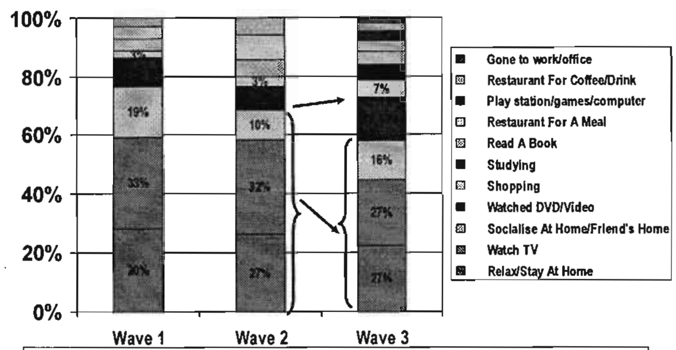
The context within which the movie activity is centred has also been explored. Domestic and day to day activities are far more likely to precede the event than before. Classic respondents are more likely to have engaged in some other activity prior to the movie.



Overall, more people are not doing anything special before the movie; more are electing to stay on for a meal or to shop. Classic respondents are far more likely to go on to another activity, in that they tend to include the movie experience in a larger "outing."

MOVIE BEHAVIOUR

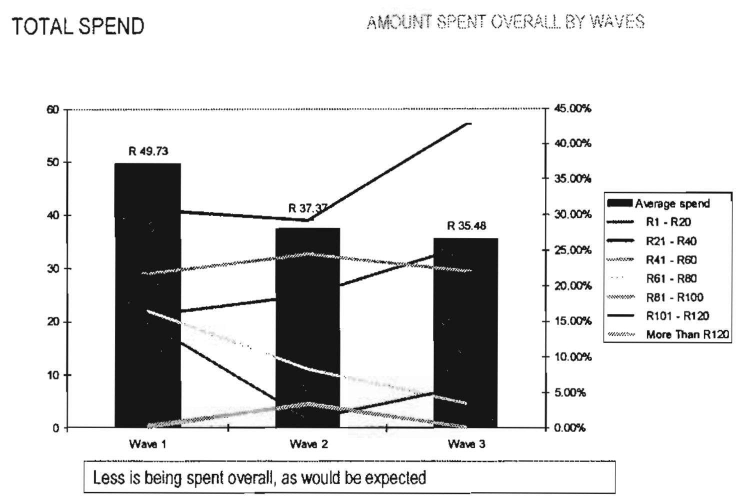
ACTIVITIES INSTEAD OF THE MOVIE



Reduction in non movie focused home-based activities (although these still dominate), whilst more people are choosing to still watch a movie, but at home

Respondents were asked what they would have been doing had they not come to the movies that day. More respondents claimed that they would have partaken in some other out-of-home activity compared to previous waves. This is far more notable among Classic cinema respondents where they appear to be people more actively involved in out of home entertainment, since even the movie is often centred in other activities.

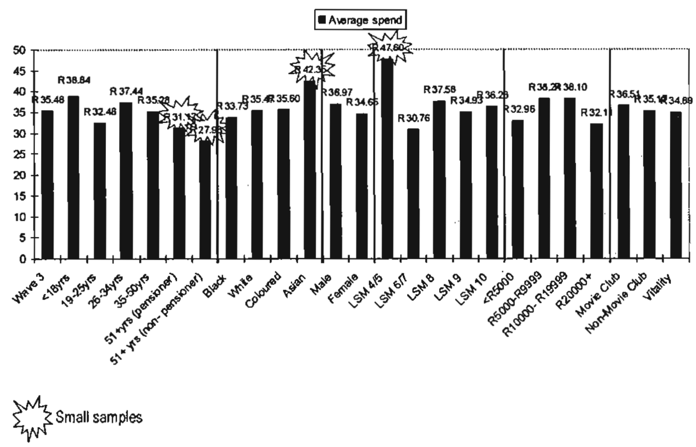
5.1.4. Perceived Value for Money



Total claimed expenditure has reduced, and this is primarily coming from Junction cinemas. In the latest wave, recalled ticket versus refreshment expenditure was also recalled, and refreshment expenditure is relatively less varied across the brands compared to ticket, as would be expected.

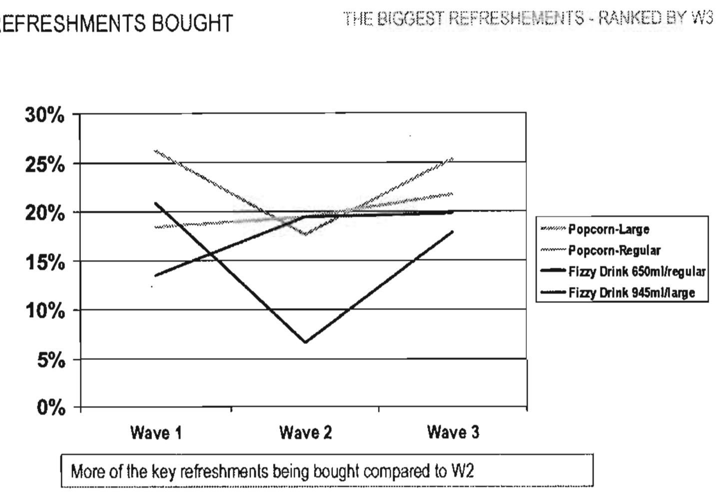
TOTAL SPEND

AMOUNT SPENT OVERALL BY W3 SUB-SAMPLES



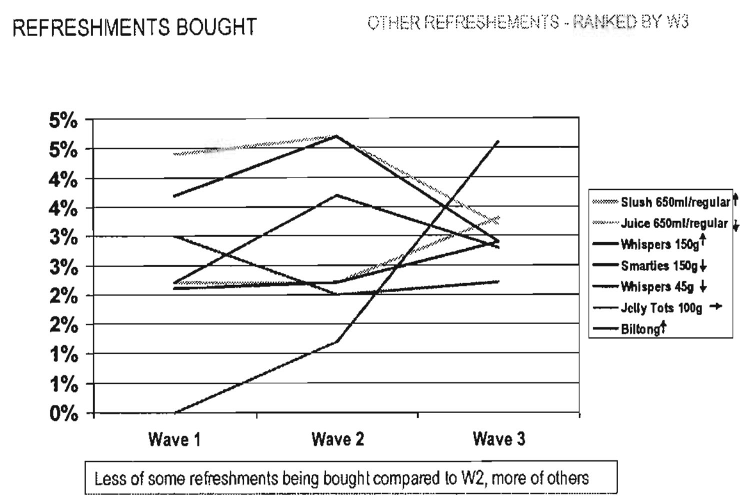
Total claimed expenditure has been compared for sub-samples in Wave 3. Young adults and those in LSM 6/7 but also those in the top income bracket (probably Vitality members) appear to be spending the least.

REFRESHMENTS BOUGHT



Actual refreshments purchased by the respondents are presented here for the record, but of course as mentioned earlier, Ster-Kinekor own stock records would be the most reliable measure of popularity. While this information was considered confidential, the management team have stated that the refreshment revenues, measured per person, have increased. This is related to a reduction in queuing times at the box office, catering,[3] and self-service terminals. This affords customers more time to purchase refreshments prior to the start of the film.

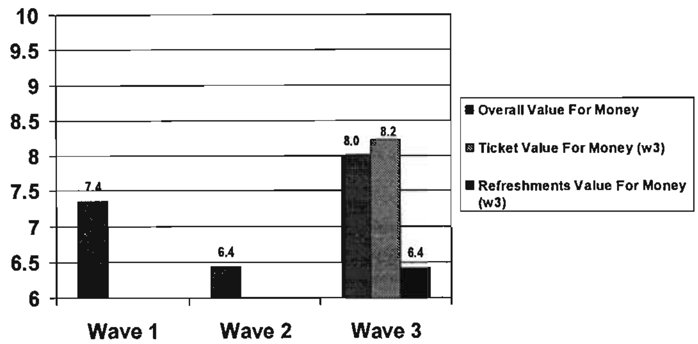
[3] Based on comments from management.



The increase in Biltong (Jerky) sales is related to the increase in Black consumer market attendance, according to the catering[4] General Manager.

[4] Ster-Kinekor term for refreshments

MOVIE EXPERIENCE VALUE FOR MONEY RATINGS

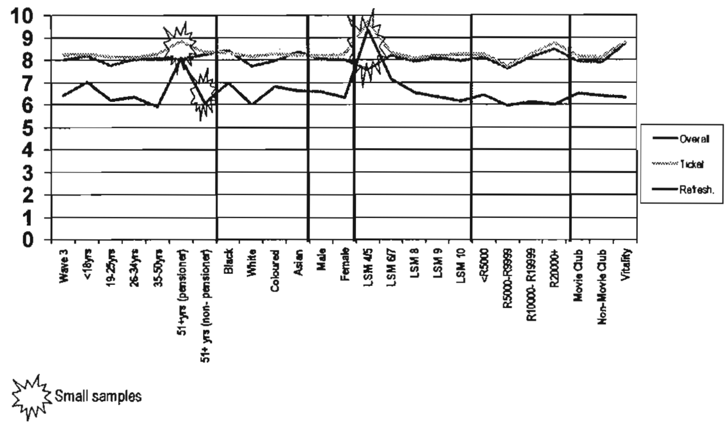


The overall value perception has improved, but refreshments' value for money is an issue

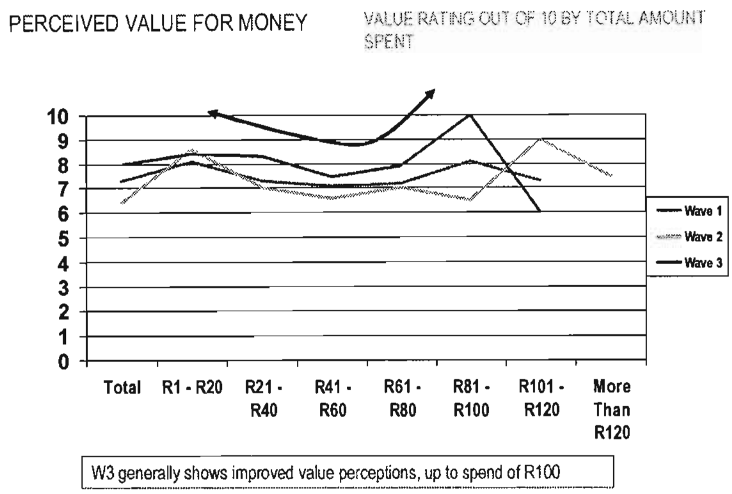
Overall, the value for money perception related to expenditure has improved notably to quite a pleasing degree. The perception that refreshments sold at the cinema are more expensive than they need be remains (whilst the previous wave of this tracking research did not single out refreshments, other research into cost perceptions done last year identified refreshments as the key problem area). Not surprisingly, the overall and ticket value ratings are much higher at Junction cinemas.

PERCEIVED VALUE FOR MONEY

VALUE FOR MONEY RATINGS OUT OF 10 BY W3 SUB-SAMPLES



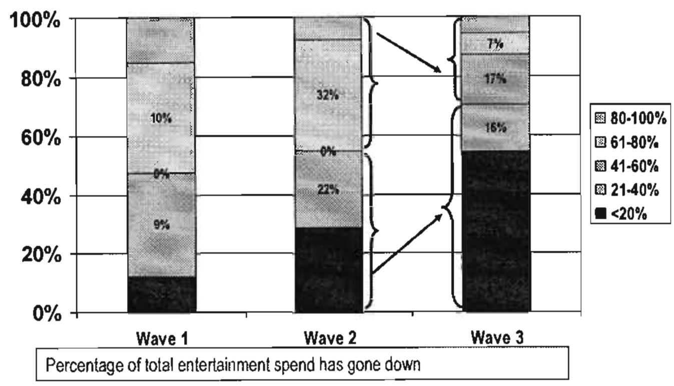
Value for money ratings are shown for the Wave 3 sub-samples here. White and upper LSM respondents have the poorest view on value, especially with regards to refreshments.



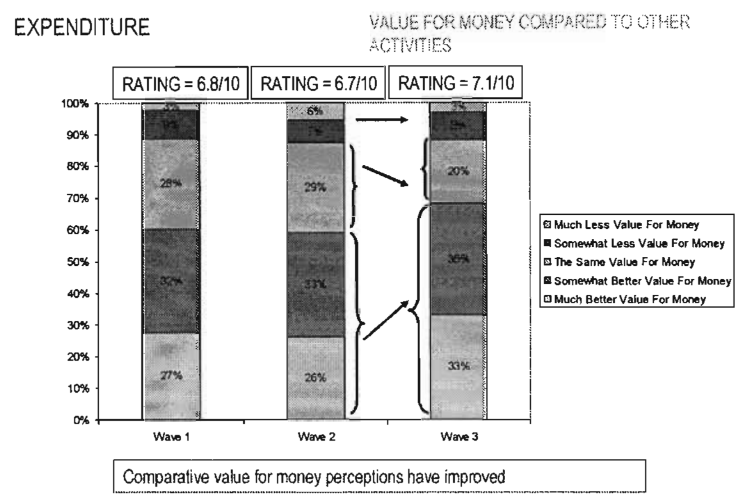
Across the waves, there is a consistent inverted "value curve" in the range from R20 to R100. However, the curve is less steady when the brands are compared in Wave 3. It is clear however that there is a value threshold currently sitting at R80-R100. Most people are limiting their expenditure to R80. The few spending more will still see this as fair value until R100, after which it drops off steeply.

EXPENDITURE

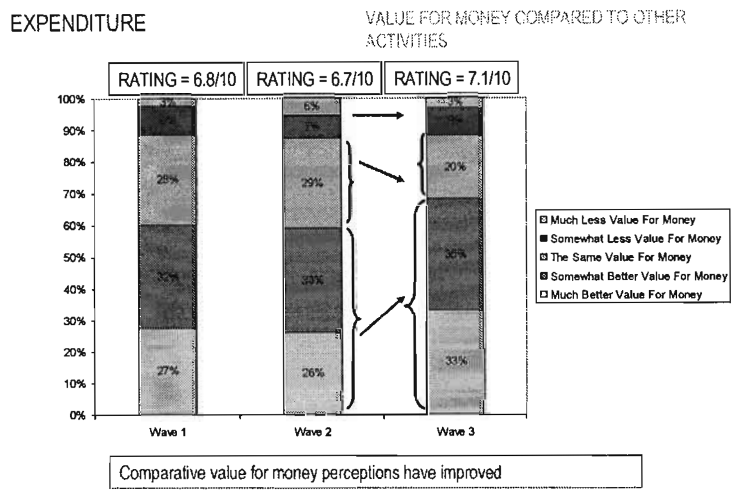
PERCENTAGE OF TOTAL ENTERTAINEMENT BUDGET SPENT AT THE MOVIES (2 - SIMPLIFIED BREAKS)



Respondents were asked to estimate what proportion of their total entertainment budget was allocated to going to the cinema. Results show that the claimed percentage spent at movies has decreased significantly. Since more people are claiming to have other out-of-home activities as alternatives to movies, this would be expected. Nouveau cinema respondents would appear to be more devoted movie lovers, spending relatively more on this activity than do people at the other brands.



Considering that there is more competition for share of the entertainment purse, it is good to see that the relative value for money rating for movies is improving overall. This improvement is centred at Junction cinemas, however, and scores are actually lower at Classic and Nouveau cinemas. This could partly be caused by the knowledge that movie tickets can now be purchased for a lot less at alternative sites such as Junction.



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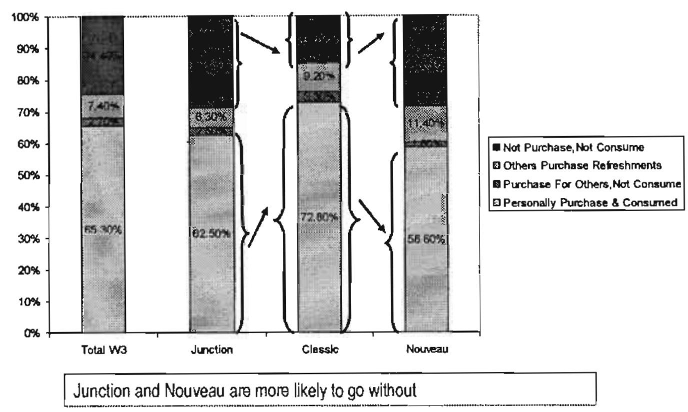
When the value ratings are examined in relation to the specific activities mentioned (ranked from left to right in order of frequency of mention), it can be seen that the general ratings for Wave 3 have "smoothed out, indicating a generally good perception. Interestingly the rating peaks against staying at home to watch TV, which is a theoretically "cheap" activity—most Junction and Nouveau cinema people are still considering it worthwhile to get out and go to the cinema instead. Classic cinema respondents are less sure of this.

EXPENDITURE

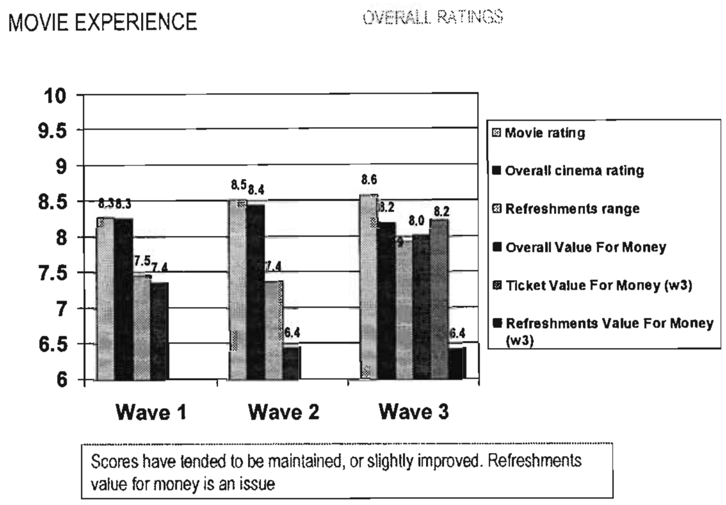
PURCHASING VERSUS CONSUMPTION BY W3 BRANDS



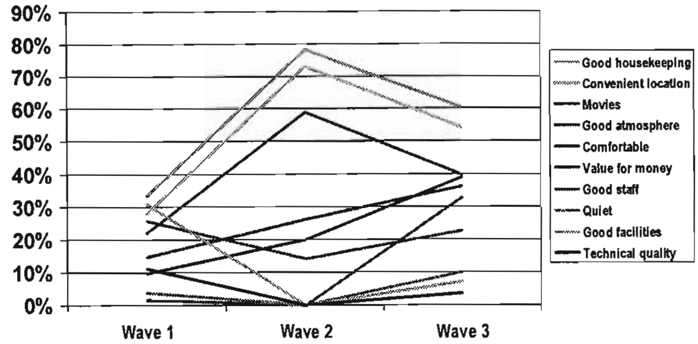
In this wave, relative levels of refreshment purchase and consumption of refreshments were explored. Most people both purchase and consume, but significant proportions are going without altogether, probably due to expense. Interestingly, those having others buy for them are not more likely to give the refreshment expenditure a higher value rating, than those who purchased for themselves, but rate the value much higher than those who purchase but do not personally consume.

It is useful to compare value ratings for different kinds of refreshments. They are shown above ranked from left to right in order of frequency of mention as a purchase. Value perception does not predict frequency of purchase. However the average value perception of the top sellers is higher than for all refreshments taken together.

5.1.5. Movie Experience



All the key ratings included in the study are included here to give a broad view of satisfaction levels. There is clearly a general tendency towards improvement—the slight drop in the cinema rating is not large enough to present a concern given the generally good scores. As indicated earlier, perceptions regarding value for money of refreshments remain a problem area. Whilst one could argue that this perception does not seem to prevent the majority of people from purchasing refreshments, the issue can still have an impact on the overall brand identity.



The 3 main drivers of satisfaction are consistent, but other drivers are catching up, and atmosphere and comfort in particular are steadily growing

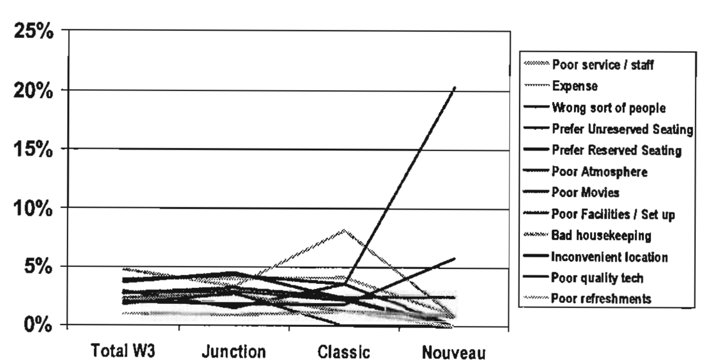
Respondents were asked to give their main reasons for assigning their rating to the cinema. A pre-coded list was drawn up based on the responses gathered across the waves, and this served as a useful basis for comparing responses. Responses which came up that were not already on the list were recorded and post-coded. Reasons for ratings were given spontaneously, rather than being prompted off the list, so individual items gaining frequencies of even 10% were still worth paying attention to. This can make focusing on real trends problematic; hence the analysis produced here is based on grouping responses into key themes.

The tables below reveal the kinds of comments that fell into each of the categories included above. These comments came from the Wave 3 sample. Reasons for ratings for the Wave 3 brands are shown above, and the effects of the differential positioning are in evidence. Junction cinemas do quite well on an "all round" basis, but not surprisingly, good ticket price is much stronger for this brand and outstrips the movies offered, compare to the other brands. Classic cinemas are more likely to be rated well because of cinema housekeeping quality and atmosphere, and Nouveau cinemas are far stronger on the movies, and also has a higher "atmosphere" mention than the other brands.

Whilst no single negative issue emerges at extremely high levels, those items that were highest in wave 3 should still warrant some attention. Staff service is a key area than can make or break the movie experience. The tables below show the kinds of comments that fell into each of the categories included above. These comments came from the Wave 3 sample.

MOVIE EXPERIENCE

REASONS FOR NEGATIVE RATINGS OF CINEMAS – W3 BRANDS

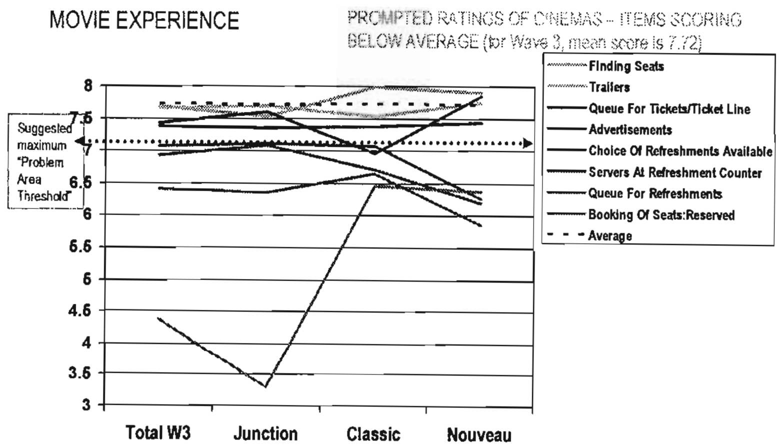


Seating is an influential issue for Nouveau, whilst the steep increase of poor service is coming from Classic

Staff service issues are key at Classic cinemas—people are paying far more compared to Junction cinemas, and do not have the selective/specialist movie rationale belonging to Nouveau cinema clients, and thus they will be more sensitive to something such as poor service.

Respondents were asked to rate the cinema they attended on a number of aspects. The items where Wave 3 scores were above the Wave 3 average are included here. It is suggested that only items scoring over 8/10 should be considered acceptable, however, if there is to be a concerted drive to remain deserving of its place as brand leader. Toilet facilities, accessibility of movie information and box office staff should be considered key "have to have" areas that should not be that difficult to improve. (Choice of movies might be the exception for Junction cinemas where this limited offering is part of a strategic decision).

The items where the brand scored lower than average (Wave 3) are included here. As noted above the "average" score is not good enough, and most items scoring lower than 8/10 should be considered to be not at optimal level. It is also recommended that items scoring below 7/10 as especially problematic. As it stands, the entire refreshment purchasing experience leaves a lot to be desired, especially as the average scores are slipping.



5.1.6. Conclusion

This chapter presented the findings and interpretation of the research and indicated a slight improvement in the perception of the brand; mainly driven by the price at Junction cinema sites. While the experience was not cited as a reason for a negative rating, it has remained constant, if not declined as a reason for a positive rating. There is a negative perception of staff/service at Classic cinema sites and the lack of reserved seating has the poorest rating at Junction cinema sites. Nouveau cinema customers rate the refreshments negatively, although this seems to be a consistent perception. The evidence presented suggests that the concept of best practice has not yielded the results anticipated. The key drivers of the past, convenience and product have remained true.

CHAPTER 6

CONCLUSIONS AND RECOMMENDATIONS

6. Introduction

In Chapter 5, the research finding were presented and interpreted. The results improvement is the way Ster-Kinekor is viewed by its customers, whereby it is considered more value for money than in the past. However, the improvement relative to the experience is insufficient to drive customers to cinema sites and hence, location and quality of films remain key drivers. The improved value perception has been driven by the pricing strategy implemented at various branded cinema sites. In this concluding chapter, further commentary will be offered, as well as recommendations given as to delivery on brand promise.

6.1. Conclusion

Chapter 1 introduced the research issues explored in the study as well as Ster-Kinekor's strategy of implementing best practice to enhance the value of the brand and improve profitability. The concept of "Escape through Glamour" was introduced as the interpretation of the desired positioning and by implication the way customers should experience Ster-Kinekor.

The challenge faced by Ster-Kinekor is not unique; cinema chains across the world share the same dilemma. Kate Kelly (2005) states that there are significant hurdles being faced by an industry coming out of a difficult decade, leaving many cinema owners seeking ways to stay relevant in an "on demand, downloadable entertainment world." (Kelly 2005).

While many cinema chains around the world have looked at two other revenue streams, namely, digital cinema and increased advertising and refreshments revenue, Ster-Kinekor has opted for a third stream, namely to make the cinema-going experience more "Glamorous." The senior management team indicated that it is looking at the other two revenue streams as well. This present study reviews Ster-Kinekor's success to date.

In Chapter 2 the theoretical framework was introduced to support the study. The Chapter introduced the concept of brand and brand building and highlighted the benefits that accrue from having a brand that resonates with its consumer-base. Toyota's TPS system was reviewed as a case in point, to relate the concept of best practice and the impact of a brand. Ster-Kinekor has initiatives in place to ensure a change in culture that is supportive of the strategy and introduced the self-service terminal as its first differentiator. The company has created a platform in order to introduce a step change and thereby differentiate itself from an experience perspective in the entertainment competitive set. Indications are that Ster-Kinekor has failed in this, with the exception of the introduction of self-service terminals.

In Chapter 3, the research methodology was introduced. Informal interviews with management and intercept interviews were conducted to establish the impact of interventions. The management dilemma of declining attendances, with no control of the quality of content produced by Hollywood was described in detail. Ster-Kinekor's key supplier was introduced and the brand promise "Escape through Glamour" together with the introduction of best practice was presented as the organisations solution.

Chapter 4 surveyed in brief the history of Ster-Kinekor and highlighted the origins of the best practice strategy. The interventions defined as best practice were presented with a commentary in regard to their effectiveness. Whist numerous initiatives were introduced, the research findings indicate that they were insufficient to entice the customer to make the cinema and Ster-Kinekor in particular, the preferred choice of entertainment.

The results of the field research were presented in Chapter 5, as well as their interpretation. The categorised research revealed an overall improvement in the value perception of the entertainment being offered by the organisation. This was driven primarily by the pricing of the Junction cinema sites. There were no negative ratings of the cinema-going experience that adversely affected Ster-Kinekor as an entertainment option.

The results of the survey suggest that although operational innovation (best practice) improves the overall value perception, it has not directly resulted in increased customer attendances. The benefits[1] experienced in improved efficiency, reduced costs and increased catering revenue have allowed the organisation to introduce an affordable price strategy that has the potential of increasing customer attendances. In this context, the concept of best practice, and the resulting enhancement of the perception of the brand have a positive influence on attendance figures and hence profitability. This is evidenced by the research finding highlighted below.

[1] Based on interview with the management team.

MOVIE ATTENDANCE

REASON FOR REPORTED INCREASE IN ATTENDANCE

Reason For Increased Attendance Frequency	Wave 1	Wave 2	Wave 3
Movie ticket prices decreased	0%	0%	34%
More Time/Less Busy	28%	27%	25%
Better Variety	15%	16%	22%
Convenient	16%	21%	21%
Enjoy The Experience	22%	19%	20%
Can afford to go more often	0%	0%	20%
Sociable	12%	14%	17%
Discovery movie club member	14%	16%	9%
Ster-Kinekor club member	8%	12%	8%
Change in work schedule	6%	9%	7%
Family/friends influence	0%	0%	4%

Pricing drives increased attendance, but this is still supported by other aspects such as perceived time availability, convenient and movie offering/experience

Table 6.1. Movie Attendance

Ster-Kinekor does not possess a clear branding strategy. Most of the initiatives introduced by management refer to branding elements: that is, a phased rollout of the new logo and uniforms. The organisation also has new-look cinemas. These are evidenced in its newly opened cinema complexes in Capegate, Cape Town; Somerset, Western Cape and Wonderpark, Pretoria.

The concept of "Escape through Glamour" resulting in an enhanced cinema experience, thereby yielding additional profits has yet to materialise. While a platform has been created, the issue of customer service and the "Glamour" brand positioning has as yet not been introduced as direct interventions. Investigations into the organisation and interviews with senior management suggest that plans are being developed and will be introduced sometime in 2006. Additionally, the operations interventions were introduced for this purpose. Ster-Kinekor should craft a clear implementation strategy on it brand position. A recommended approach is presented in 6.2.1.

6.2. Future Research

Ster-Kinekor is, to use Kotlers phrase, at "the expected product level." It needs to re-determine its definition and begin challenging what Kotler calls "the augmented product level." The research presented in this study serves to track this position and offer insights into customer perception. It does not however present answers to the challenges it raises. This is exactly the essence of its brand promise and customer experience of the tangible (self-service terminals) and intangible (the experience; the atmosphere) components of it "Glamour" brand positioning.

Anthony W. Ulwick states that his organisation Strategyn[2] had spent twelve years watching organisations obtain market research and product development, both right and wrong. The problem as he saw it was that:

> Companies ask their customers what they want. Customers offer solutions in the form of products and services. Companies then deliver these tangibles, and customers very often are not satisfied. Rather, customers should be asked only for outcomes—that is, what they want a new product or service to do for them (Ulwick 2002:91-97)

The rationale for this assertion is best expressed by Dorothy Leonard (2002) when she states:

> Customers only know what they experienced. They cannot imagine what they don't know about emergent technologies, new materials, and the like.

[2] An innovation management consultancy and enterprise software firm based in Lantana, Florida, United States of America.

Ster-Kinekor's current approach to research is limited to tracking the progress of innovation, whereby innovation is driven by intellectual property within the organisation. While they may have attained success, e.g., self service-terminals, they are placing limits on the speed and quality of innovation.

A five step approach to uncover the desired outcome of the customer is recommended:

	HOW TO FOCUS ON OUTCOMES
Step One	Plan outcome-based customer interviews.
Step Two	Capture desired outcomes.
Step Three	Organise the outcomes
Step Four	Rate outcomes for importance and satisfaction
Step Five	Use the outcomes to jumpstart the innovation

Table 6.2. How to Focus on Outcomes [Source: Adapted from: Greenberg and Baron (1999:13)]

6.2.1. Plan Outcome-Based Interviews

To be successful, outcome-based customer interviews must be deconstructed, step by step, thereby revealing the underlying process or activity associated with the product or service.

Ster-Kinekor should map the customer journey, i.e., the various touch-points with the organisation e.g., newspaper, telephone directory, call centre, ticket desk, refreshment counters, entry to cinema, presentation of the film, exit and bathroom facilities, and thereby carefully select a diverse sample of customers. This sample should be representative of the cinema population.

6.2.2. Capture the Desired Outcomes

This requires a moderator who can distinguish between outcomes and solutions and can weed-out vague statements, anecdotes and other irrelevant information. After the moderator captures a handful of these statements and adjectives, he or she should translate each one into a desired outcome.

This process will help Ster-Kinekor understand the reasons behind the customer's response to negative ratings of the cinema site in respect to poor staff/service. The current practice relies solely upon internal input into crating strategies to overcome this perception.

6.2.3. Organise the Outcomes

The outcomes must be categorised sequentially and duplicates removed. This will help determine how customers measure value. This is Ster-Kinekor's desired outcome.

6.2.4. Rate Outcomes for Importance and Satisfaction

A qualitative survey should be conducted in which the desired outcomes are rated by different types of customers. Participants should be asked to rate on importance and the degree to which the outcome is currently satisfied. This is fed into a mathematical formula explained in 6.2.4.1.

6.2.4.1. Formula

$$\boxed{((\text{Importance} + (\text{Importance} - \text{Satisfaction})) = \text{Opportunity}}$$

The value in parenthesis can never be less than zero. In other words, high levels of satisfaction do not detract from importance. This algorithm will ensure overcoming the limitations of gap analysis, an approach that considers only the difference between importance and satisfaction.

6.2.5. Use the Outcomes to Jump-Start Innovation

This final step entails using the data to uncover opportunity areas for product development, market segregation and better competitive analysis.

6.3. Recommendations

6.3.1. Selling the Brand inside the Organisation

In the process of understanding Ster-Kinekor's strategy, there exists a lack of structured "selling of the brand" within the organisation. This is an area that is neglected by most organisations. Another common shortfall or misunderstanding is the lack of understanding that the task is about convincing employees rather that informing employees.

According to Jim Collins (2001:13), the philosophy of "First Who...Then what" highlights the importance of the employing the right people in an organisation. Collins goes on to state that:

> Good-to great leaders first got the right people on the bus, the wrong people of the bus, and the right people in the right seats—and then figured out where to drive it. The old adage, "People are your most important asset" turns out wrong. People are not your most important asset. The right people are.

According to Colin Mitchell (January 2002:99), internal marketing is important. It helps employees create an emotional connect to the product and services. It helps them understand the promise you have made and the expectations set by the organisations marketing. Their failure to understand may result in the employees working against the promise to customers or they may not believe in the brand strategy and feel alienated or work against the strategy.

Colin Mitchell (2002: 99) goes on to suggest three principles that enable employees to "live the vision" in their day to day activities. This translates into a greater likelihood that customers will experience the promise intended by the organisation. These principles are as follows:

i. *Choose Your Moment:* Most people resist change. Branding and visioning are no different. Opportune moments are when the organisation is going through a change or experiencing a fundamental challenge. Employees at this time need a sense of direction and are relatively receptive to these initiatives. These moments are often create either positive or negative energy—enthusiasm for mew programs or unproductive rumour mongering. Turning points are thus ideal opportunities for internal branding campaigns.

ii. *Link Internal and External Marketing:* Employees need to hear the same message that is sent externally to the one sent internally. Should this be mismatched it could be very confusing, and threatens the employee's perception of the company's integrity. Alignment enables employees to deliver on customer expectations and to help the organisation achieve goals that might otherwise be out of reach. In 1997, IBM launched its e-business campaign (which is widely credited for turning the company around) and employed "two-way branding." This strengthened internal marketing because it drew from the same "big idea" as advertising. Consumer marketing grew stronger because the message drew from employees' behaviour as well as the company's strength and attitudes. The process resulted in a message that is unique to the company. More importantly (based on Jim Collins finding about the importance of people), the organisation can avoid creating a message that does not resonate with staff or worse, one that build resentment.

iii. *Bring the Brand Alive for Employees:* The goal is to create an emotional connection to an organisation that transcends any one particular experience. The employees of Ster-Kinekor should create a connection to inform the way they approach there jobs, even if they do not interact with the customers. You want them to have the brand vision in mind and to consider whether or not they are supporting the brand vision in their minds and in every decision they make. In thinking through the internal campaign, the executives from Ster-Kinekor should first answer some key questions: What do their employees think of them as a company? What do the executives want the employees to think? What will convince them of this? Why should they believe the executive? In conclusion, Ster-Kinekor should look to the internal brand marketing because if employees do not care about the company, and do not find an emotional attachment, they will contribute to its demise.

6.4. Conclusion

Although Ster-Kinekor has succeeded through its implementation of best practice to eliminate the negative experience in going to its theatres, they have not introduced any incentive in regards to experience to further entice customers. The staid principles of the product and convenience still hold true as the main derivers of customer behaviour.

In the context of an increasingly competitive environment and Ster-Kinekor's lack of control of the quality of the motion picture product, the organisation must look to reinvent the cinema experience or the customer journey. In order to lower the barrier of entry for new customers it has introduced the junction tier and reduced ticket prices. The repositioning of its brand however, is limited to operational elements and there is a need to define a branding strategy outside of this.

The potential of one additional visit per discrete customer is assumed to have been the result of the strategy inducing people to choose Ster-Kinekor as an entertainment option outside the current key drivers of product and convenience (proximity and location), and should be set as a target for the organisation.

In summary, to achieve its objectives, the organisation must ensure that the culture of the organisation reflects the intentions of its strategy. A clear brand positioning strategy must be crafted. Research should enter the arena of "outcomes-based" research, rather than mere "tracking." Clear differentiators must be identified. The implement of best practices as defined in Chapter 4 is inadequate.

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APPENDICES

APPENDIX A

RESEARCH QUESTIONNAIRE[1]

		School Holidays						
		Mon	Wed	Thurs	Tues	Fri	Sat	Sun
Before 12h00	Quota							
	Actual							
12h01 to 17h00	Quota							
	Actual							
17h01 Onwards	Quota							
	Actual							

		School Term Times						
		Mon	Wed	Thurs	Tues	Fri	Sat	Sun
Before 12h00	Quota							
	Actual							
12h01 to 17h00	Quota							
	Actual							
17h01 Onwards	Quota							
	Actual							

[1] Research Questionnaire commissioned by Ster-Kinekor (Pty) Ltd and conducted by Yellowwood Brand Architects, 189 Witkoppen Road, Waterford Drive, Waterford Office Park, 8 Technology House, Ground Floor, Fourways, 2055.

	Query	Omissions	Checkback	Date	Initials	F-T-F	Phone	Interviewer No.
Field								
Coding								....
								Respondent No. ....

Debriefed by: ______________ Coding checked by: ______________

Edited by: ______________ Consistency checked by: ______________

Coded by: ______________ Editing checked by: ______________

Please give me your name, address and the exact suburb, town and province in which you live, even if there is no normal postal delivery there. **ENSURE THAT SPELLING OF SUBURB AND TOWN IS CORRECT.**	Gee asseblief vir my jou naam, adres en presiese voorstad en dorp waarin jy woon, selfs al word daar nie gewoonlik pos afgelewer nie. **MAAK SEKER DAT SPELLING VAN VOORSTAD EN DORP REG IS.**

Name of respondent/•Naam van respondent: ______________________________

Address/•Adres: ______________________________

Suburb/•Voorstad: ______________________________

Town: ______________________________

Province: ______________________________

Telephone No/•Telefoonnommer: (H)__________ (W) __________

Cell Phone No/•: ____________________

Interviewer/•Onderhoudvoerder: (4) ____________________ ☐☐☐☐

Field Manager/•Veldbestuurder: (5) ____________________ ☐☐☐☐

	INTRODUCTION		**INLEIDING**
1a.	Hello, my name is .... I work for (MSA), an independent research company. We are conducting a survey, and I wonder if I might ask you a few questions about your movie habits. The interview will take about 10-15 minutes. Are you willing to participate?	1a.	Hallo, my naam is .... Ek werk vir (MSA), 'n onafhanklike marknavorsingsmaatskappy. Ons is besig met 'n opname en ek wonder of ek vir jou 'n paar vrae oor jou rolprentgewoontes mag vra. Die onderhoud sal ongeveer 10-15 minute neem. Is jy bereid om deel te neem?

• **IF YES, CONTINUE WITH INTERVIEW.** • **IF NO, THANK AND CLOSE.**	• **INDIEN JA, GAAN VOORT MET ONDERHOUD.** • **INDIEN NEE, BEDANK EN SLUIT ONDERHOUD AF.**

SECTION A: SCREENING QUESTIONS	AFDELINGA: SIFTINGSVRAE

1b.	Please tell me if you or any member of your family or close friends work for a(n): …?	1b.	Sê asseblief vir my of jy of enige lid van jou gesin of goeie vriende werk vir 'n: …?

*Marketing research company?/•Marknavorsingsmaatskappy	2-1		⇨ CLOSE/•SLUIT AF
*Advertising agency?/•Reklame-agentskap	-2		
*Press, TV or radio station?/•Die pers, 'n TV- of radiostasie	-3		
*Cinemas/movie houses/•Bioskope/rolprentteaters	-4		
None of these/•Geen van bogenoemde	-5		⇨ CONTINUE/•GAAN VOORT

1c.	DAY OF INTERVIEW **INTERVIEWER, PLEASE RECORD.**	1c.	DAG VAN ONDERHOUD **ONDERHOUDVOERDER, NOTEER ASSEBLIEF.**

Monday/•Maandag	3-1		⇨ CHECK QUOTA/•GAAN KWOTA NA
Tuesday/•Dinsdag	-2		
Wednesday/•Woensdag	-3		
Thursday/•Donderdag	-4		
Friday/•Vrydag	-5		
Saturday/•Saterdag	-6		
Sunday/•Sondag	-7		

INTERVIEWER, PLEASE CHECK QUOTAS FOR:	ONDERHOUDVOERDER, GAAN ASSEBLIEF KWOTAS NA VIR:
• **MONDAY/WEDNESDAY/THURSDAY (CODES –1 , -3 AND –4)** • **TUESDAY (CODE –2)** • **FRIDAY (CODE –5)** • **SATURDAY (CODE –6)** • **SUNDAY (CODE –7)**	• **MAANDAG/WOENSDAG/DONDERDAG (KODE –1, -3 EN –4)** • **DINSDAG (KODE –2)** • **VRYDAG (KODE –5)** • **SATERDAG (KODE –6)** • **SONDAG (KODE –7)**

1d.	TIME OF MOVIE What time did you attend a movie today?	1d.	TYD VAN ROLPRENT Hoe laat het jy vandag na 'n rolprent gaan kyk?

1. DO NOT PROMPT. **2. SINGLE MENTION.** **3. INTERVIEWER, PLEASE RECORD BELOW.**	**1. MOET NIE VOORSÊ NIE.** **2. EEN ANTWOORD.** **3. ONDERHOUDVOERDER, NOTEER ASSEBLIEF HIERONDER.**

Morning (10h00 – 12h00)/•Oggend (10h00 – 12h00)	4-1		⇨ CHECK QUOTA/•GAAN KWOTA NA
Midday (12h01 – 14h00)/•Middag (12h01 – 14h00)	-2		
Afternoon (14h01 – 17h00/•Namiddag (14h01 – 17h00)	-3		
Evening (17h01 onwards)/•Aand (17h01 en later)	-4		

No movie attended/•Nie na rolprent gaan kyk nie	-5		⇨ CLOSE INTERVIEW/•SLUIT ONDERHOUD AF

1e.	CINEMA ATTENDED **INTERVIEWER, PLEASE RECORD.**	1e.	ROLPRENTTEATER BESOEK **ONDERHOUDVOERDER, NOTEER ASSEBLIEF.**

	Tick only in white blocks	Junction	Classic	Nouveau	Check against quota
1	Bayside	5-1			
2	Bridge PE	-2			
3	Brooklyn Nouveau			-3	
4	Cape Gate	-4			
5	Carlton	-5			
6	Cavendish Commercial		-6		
7	Cavendish Nouveau			-7	
8	Cresta		-8		
9	East Rand Mall	-9			
10	Eastgate		-10		
11	Fourways	-11			
12	Gateway Commercial		-12		
13	Kenilworth	-13			
14	Key West	-14			
15	Kollannade	-15			
16	Musgrave	-16			
17	Northgate	-17			

18	River Square	-18			
19	Rosebank Nouveau			-19	
20	Rosebank The Zone	-20			
21	Sandton		-21		
22	Scottsville	-22			
23	Somerset West Mall	-23			
24	Southgate	-24			
25	Sterland	-25			
26	Vincent Park	-26			
27	Westgate	-27			
28	[redacted]				

1f.	**AGE**: How old are you?	1f.	**OUDERDOM**: Hoe oud is jy?

1. HAND RESPONDENT AGE CARD. **2. SINGLE MENTION ONLY.** **3. IF 51+ YEARS, RECORD WHETHER PENSIONER OR NON-PENSIONER.**	**1. GEE OUDERDOMSKAART VIR RESPONDENT.** **2. NET EEN ANTWOORD.** **3. INDIEN 51+ JAAR, NOTEER AS PENSIOENARIS OF NIE-PENSIOENARIS.**

Younger than 12 years/•Jonger as 12 jaar	6-1	⇨ CLOSE/•SLUIT AF
12 – 13 years/•jaar	-2	⇨ ASK PARENT/GUARDIAN TO SIGN PERMISSION FORM/•VRA OUER/VOOG OM TOESTEMMINGSVORM TE TEKEN

14 – 18 years/•jaar	-3	⇨ CONTINUE/•GAAN VOORT
19 – 25 years/•jaar	-4	
26 – 34 years/•jaar	-5	
35 – 50 years/•jaar	-6	
51 – 59 years (non-pensioner)/•jaar (nie-pensioenaris)	-7	
51 – 59 years (pensioner)/•jaar (pensioenaris)	-8	
60+ (non-pensioner)/•(nie-pensioenaris)	-9	
60+ (pensioner)/•(pensioenaris)	-10	
Refuse/•Geweier	-11	⇨ CLOSE/•SLUIT AF

	SECTION B: MOVIE HABITS AND PREFERENCES		**AFDELING B: ROLPRENTGEWOONTES EN -VOORKEURE**
2a.	Thinking of the <u>past month</u>, approximately how many movies have you seen at a movie theatre?	2a.	Met die <u>afgelope maand</u> in gedagte, ongeveer hoeveel rolprente het jy by 'n rolprentteater gesien?

1. DO NOT PROMPT. **2. RECORD EXACT NUMBER BELOW.** **3. PLEASE USE LEADING 0'S.**	**1. MOET NIE VOORSÊ NIE.** **2. NOTEER PRESIESE AANTAL HIERONDER.** **3. GEBRUIK ASSEBLIEF NULLE VOORAAN.**

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2b.	Of these movies you have seen in the past month **(REFER TO Q.2a)**, how many were at a Ster-Kinekor theatre?	2b.	Van hierdie rolprente wat jy in die afgelope maand gesien het **(VERWYS NA V.2a)**, hoeveel was by 'n Ster-Kinekor teater?

1. DO NOT PROMPT. **2. RECORD EXACT NUMBER BELOW.** **3. PLEASE USE LEADING 0s.** **4. RESPONSE IN Q.2b CANNOT BE HIGHER THAN RESPONSE IN Q.2a.**	**1. MOET NIE VOORSÊ NIE.** **2. NOTEER PRESIESE AANTAL HIERONDER.** **3. GEBRUIK ASSEBLIEF NULLE VOORAAN.** **4. ANTWOORD IN V.2b KAN NIE MEER WEES AS ANTWOORD IN V.2a NIE.**

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....	....	....

2c.	And thinking now of the past year, approximately how many movies have you seen at a movie theatre?	2c.	En met die afgelope jaar nou in gedagte, ongeveer hoeveel rolprente het jy by 'n rolprentteater gesien?

1. **DO NOT PROMPT.** 2. **RECORD EXACT NUMBER BELOW.** 3. **PLEASE USE LEADING 0'S.** 4. **RESPONSE IN Q.2c MUST EQUAL OR BE MORE THAN RESPONSE IN Q.2b.**	1. **MOET NIE VOORSÊ NIE.** 2. **NOTEER PRESIESE AANTAL HIERONDER.** 3. **GEBRUIK ASSEBLIEF NULLE VOORAAN.** 4. **ANTWOORD IN V.2a MOET MEER OF GELYK WEES AAN ANTWOORD IN V.2b.**

-9-	....	....

2d.	Of these movies you have seen in the past year **(REFER TO Q.2c)**, how many were at a Ster-Kinekor theatre?	2d.	Van hierdie rolprente wat jy in die afgelope jaar gesien het **(VERWYS NA V.2c)**, hoeveel was by 'n Ster-Kinekor teater?

1. **DO NOT PROMPT.** 2. **RECORD EXACT NUMBER BELOW.** 3. **PLEASE USE LEADING 0'S.** 4. **RESPONSE IN Q.2d CANNOT BE HIGHER THAN THAT IN Q.2c, BUT MUST BE THE SAME OR MORE THAN Q.2b.**	1. **MOET NIE VOORSÊ NIE.** 2. **NOTEER PRESIESE AANTAL HIERONDER.** 3. **GEBRUIK ASSEBLIEF NULLE VOORAAN.** 4. **ANTWOORD IN V.2d KAN NIE MEER WEES AS ANTWOORD IN V.2c NIE, MAAR MOET DIESELFDE OF MEER WEES AS V.2b.**

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……………… ……	……………… ……	……………… ……

2e.	Please tell me what was the last movie you saw at a cinema **(NOT VIDEO, DVD ETC.)** before the one you saw here today.	2e.	Sê asseblief vir my wat was die laaste rolprent waarna jy by 'n rolprentteater gaan kyk het **(NIE VIDEO, DVD, ENS, NIE)** voor die een waarna jy vandag hier kom kyk het?

1. DO NOT PROMPT. **2. SINGLE MENTION.**	**1. MOET NIE VOORSÊ NIE.** **2. EEN ANTWOORD.**

5 CHILDREN & IT	11-1	HITCH	-35	NAPOLEON DYNAMITE	-69
A LOT LIKE LOVE	-2	HOSTAGE	-36	P.S.	-70
A VERY LONG ENGAGEMENT	-3	HOTEL RWANDA	-37	PAPARAZZI	-71
AE FOND KISS	-4	HOUSE OF WAX	-38	PHANTOM OF THE OPERA	-72
ALFIE	-5	ICE PRINCESS	-39	POOH'S HEFFALUMP MOVIE	-73
ANACONDAS - HUNT FOR BLOOD ORCHID	-6	IN MY COUNTRY	-40	RACING STRIPES	-74
ARE WE THERE YET?	-7	INTERPRETER	-41	RAY	-75

ASSAULT ON PRECINCT 13	-8	KARMEN IN KHAYELITSHA	-42	RED DUST	-76
AVIATOR	-9	KINGDOM OF HEAVEN	-43	ROBOTS	-77
BAD EDUCATION	-10	KINGS RANSOM	-44	SAHARA	-78
BATMAN BEGINS	-11	KINSEY	-45	SAW	-79
BE COOL	-12	LADDER 49	-46	SEA INSIDE	-80
BEAUTYSHOP	-13	LADIES IN LAVENDER	-47	SHALL WE DANCE	-81
BEING JULIA	-14	LAYER CAKE	-48	SHE HATE ME	-82
BIRTH	-15	LEGEND OF THE SKY KINGDOM	-49	SIDEWAYS	-83
BLADE 3	-16	LEMONY SNICKETS	-50	SON OF THE MASK	-84
BOOGEYMAN	-17	LIFE & DEATH OF PETER SELLERS	-51	SOPHIATOWN	-85
CELLULAR	-18	LIFE AQUATIC	-52	SPANGLISH	-86
CHARLIE AND THE CHOCOLATE FACTORY	-19	LORDS OF DOGTOWN	-53	SPONGEBOB SQUAREPANTS	-87
COACH CARTER	-20	MADAGASCAR	-54	STAR WARS III	-88
CONNIE & CARLA	-21	MAN OF THE HOUSE	-55	TEAM AMERICA	-89
CONSTANTINE	-22	MAX & MONA	-56	THE COOKOUT	-90
DON'T MOVE	-23	MEAN CREEK	-57	THE FLYER	-91
DRUM	-24	MEET THE FOCKERS	-58	THE PACIFIER	-92
ELEKTRA	-25	MELINDA & MELINDA	-59	THE PRINCE AND ME	-93

ELEPHANT	-26	MERCHANT OF VENICE	-60	THE RING 2	-94
FANTASTIC FOUR	-27	MILLION DOLLAR BABY	-61	VANITY FAIR	-95
FAT ALBERT	-28	MILLIONS	-62	VERA DRAKE	-96
FINDING NEVERLAND	-29	MINDHUNTERS	-63	WAR OF THE WORLDS	-97
FLIGHT OF THE PHOENIX	-30	MISS CONGENIALITY 2	-64	WEDDING DATE	-98
GUESS WHO	-31	MONSTER IN LAW	-65	WHITE NOISE	-99
HEAD IN THE CLOUDS	-32	MOTORCYCLE DIARIES	-66	WICKER PARK	-100
HERO	-33	MR AND MRS SMITH	-67	XXX2: THE NEXT LEVEL	-101
HIDE & SEEK	-34	MY BABY'S DADDY	-68	Other:	-102

3.	In the past year, would you say that you have attended movies .... **(READ OUT SCALE)** than before?	3.	In die afgelope jaar, sou jy sê dat jy na .... rolprente **(LEES SKAAL VOOR)** as voorheen gekyk het?

1. READ OUT ALL POINTS OF SCALE. **2. SINGLE MENTION.**	**1. LEES ALLE PUNTE VAN SKAAL VOOR.** **2. EEN ANTWOORD.**

More often/•Meer gereeld	12-1	

About the same/•Ongeveer dieselfde	-2	⇨ GO TO Q.4/•GAAN NA V.4
Less often/•Minder gereeld	-3	
Don't know/unsure/•Weet nie/onseker	-4	⇨ GO TO Q.5/•GAAN NA V.5

4.	**ASK IF CODES –01 TO –03 MENTIONED IN Q.3 ABOVE.** You said that, **in the past year**, you attended movies .... **(READ OUT RESPONSE FROM Q.3)** than **before**. Why do you say this?	4.	**VRA INDIEN KODE –01 TOT –03 IN V.3 HIERBO GENOEM.** Jy het gesê dat, **in die afgelope jaar,** jy na .... **(LEES ANTWOORD VOOR UIT V.3)** rolprente as **voorheen** gekyk het. Waarom sê jy so?

1. DO NOT PROMPT. **2. MULTIPLE MENTION POSSIBLE.** **3. ONLY POSITIVE STATEMENTS CAN BE MENTIONED IN Q.4 IF CODES –01 OR -02 MENTIONED IN Q.3.** **4. ONLY NEGATIVE STATEMENTS CAN BE MENTIONED IN Q.4 IF CODES –03 OR -04 WERE MENTIONED IN Q.3.**	**1. MOET NIE VOORSÊ NIE.** **2. MEER AS EEN ANTWOORD MOONTLIK.** **3. NET POSITIEWE STELLINGS KAN IN V.4 GENOEM WORD INDIEN KODE –01 OF –02 IN V.3 GENOEM WORD.** **4. NET NEGATIEWE STELLINGS KAN IN V.4 GENOEM WORD INDIEN KODE –03 OF –04 IN V.3 GENOEM WORD.**

Too expensive/•Te duur	13-1
Less time/too busy/•Minder tyd/te besig	-2
More time/less busy/•Meer tyd/minder besig	-3
Prefer alternate forms of entertainment/•Verkies ander vorms van vermaak	-4
More choices on TV/•Meer keuses op TV	-5
Convenient/•Gerieflik	-6
Sociable/•Gesellig	-7
Better variety/•Beter verskeidenheid	-8
Became a Ster-Kinekor Movie Club member/•Het 'n lid van Ster-Kinekor Rolprentklub geword	-9
Became a Vitality/Discovery Movie Club member/•Het 'n lid van Vitality/Discovery Rolprentklub geword	-10
Became an Edgars Movie Club member/•Het 'n lid van Edgars Rolprentklub geword	-11
Became a Nu Metro Movie Club member/•Het 'n lid van Nu Metro Rolprentklub geword	-12
Enjoy the experience/•Geniet die ondervinding	-13
Change in work schedule/lifestyle/•Verandering in werkskedule/lewenstyl	-14
Movie ticket prices increased	-15
Movie ticket prices decreased	-16
Became a DSTv subscriber	-17
Became an MNET subscriber	-18
The movie I want to see isn't always showing at my regular cinema	-19
I can afford to go more often	-20

I can no longer afford to go as often as I used to	-21
Prefer to RENT movies to watch at home	-22
Prefer to BUY movies to watch at home	-23
Other (SPECIFY)/•Ander (DUI AAN)	-24

5.	ASK ALL You attended this movie at ...... **(SPECIFY CINEMA COMPLEX FROM Q.1e).** Why did you come to this specific cinema?	5.	VRA ALMAL Jy het hierdie rolprent by ... **(DUI ROLPRENTKOMPLEKS UIT V.1e AAN)** bygewoon. Waarom het jy na dié spesifieke rolprentteater gekom?

1. DO NOT PROMPT. **2. MULTIPLE MENTION POSSIBLE.**	**1. MOET NIE VOORSÊ NIE.** **2. MEER AS EEN ANTWOORD MOONTLIK.**

	MMP
Convenient/•Gerieflik	14-1
Near home/•Naby die huis	-2
Near work/•Naby die werk	-3
Movie you wanted to see was showing here/•Rolprent wat jy wou sien was hier vertoon	-4
Like this cinema/•Hou van hierdie teater	-5
Habit (always come here)/•Gewoonte (kom altyd hiernatoe)	-6
Bigger choice of movies/•Groter keuse van rolprente	-7
Specific movie titles shown here	-8

I prefer Ster-Kinekor to Nu Metro	-9
I prefer Ster-Kinekor Classic	-10
I prefer Ster-Kinekor Junction	-11
I prefer Cinema Nouveau	-12
Wider variety of snacks	-13
My friends/ spouse/ children chose the cinema complex	-14
I prefer unreserved seating	-15
I prefer reserved seating	-16
I like this envinronment better	-17
The ticket price is cheaper	-18
My kind of people/ my crowd/ people like me come here	-19
Not so crowded here	-20
Lots of people come here/ popular cinema	-21
Easy to get here (transport)	-22
Other (SPECIFY)/•Ander (DUI AAN)	-23

6a.	Overall, taking everything about this cinema into account, how would you rate it on a scale of 1 to 5, where "1" means you think it is "very good" and "5" means that you think it is "very poor"?	6a.	Oor die algemeen, met alles oor hierdie rolprentteater in gedagte, hoe sou jy dit evalueer op 'n skaal van 1 tot 5, waar "1" beteken jy dink dis "baie goed" en "5" beteken jy dink dis "baie swak"?

1. READ OUT FULL SCALE **2. SINGLE MENTION**	**1. LEES VOLLE SKAAL VOOR** **2. EEN ANTWOORD**

Very good/•Baie goed	15-1
Good/•Goed	-2
Average/•Gemiddeld	-3
Poor/•Swak	-4
Very poor/•Baie swak	-5

6b.	You rated this cinema as ………….. **(READ OUT RESPONSE FROM Q.6a).** Why did you give it this rating?	6b.	Jy het hierdie rolprentteater as ……. **(LEES ANTWOORD UIT V.6a VOOR)** geëvalueer. Waarom het jy dit hierdie punt gegee?

1. DO NOT PROMPT. **2. MULTIPLE MENTION POSSIBLE.**	**1. MOET NIE VOORSÊ NIE.** **2. MEER AS EEN ANTWOORD MOONTLIK.**

	MMP		MMP
It is clean/ tidy/•Dit is skoon/netjies	16-1	It is not clean/tidy/•Dit is nie skoon/netjies nie	-20
Variety of movies/•Verskeidenheid rolprente	-2	No variety of movies/•Geen verskeidenheid rolprente nie	-21
Good movies/•Goeie rolprente	-3	No good movies/•Geen goeie rolprente nie	-22
Conveniently located/•Gerieflik geleë	-4	Not conveniently located/•Nie gerieflik geleë nie	-23

Located close to home/•Naby aan huis geleë	-5	Located far from home/•Ver van die huis geleë	-24
Located close to shops/•Naby aan winkels is geleë	-6	Located far from shops/•Ver van winkels geleë	-25
It is comfortable/•Dit is gerieflik	-7	It is uncomfortable/•Dit is ongerieflik	-26
Staff are friendly/•Personeel is vriendelik	-8	Staff are not friendly/•Personeel is nie vriendelik nie	-27
Good/pleasant atmosphere/•Goeie/aangename atmosfeer	-9	Unpleasant atmosphere/•Onaangename atmosfeer	-28
Cinemas are good/•Rolprentteaters is nuttig	-10	Cinemas are not good/•Rolprentteaters is nie nuttig nie	-29
Upmarket/ classy ambience	-11	Snobby/ too posh/ too fancy	-30
Prefer unreserved seating	-12	Don't like unreserved seating	-31
Prefer reserved seating	-13	Don't like reserved seating	-32
Quiet/ uncrowded	-14	Not enough people go here/ too quiet	-33
Popular destination/ lots of people come here	-15	Too crowded	-34
Good range of snacks	-16	Poor range of snacks	-35
Anyone feels comfortable here	-17	Too many lower class people come here	-36
The ticket price is good value for money	-18	The ticket price is too expensive	-37

The price of snacks offers good value for money	-19	The price of snacks are too expensive	-38
		Other (SPECIFY)/•Ander (DUI AAN)	-39-

7.	If you had not come to watch a movie today, what would you have done instead?	7.	Indien jy nie vandag na 'n rolprent kom kyk het nie, wat sou jy in die plek daarvan gedoen het?

1. DO NOT PROMPT. **2. MULTIPLE MENTION POSSIBLE.**	**1. MOET NIE VOORSÊ NIE.** **2. MEER AS EEN ANTWOORD MOONTLIK.**

	MMP
Watched TV/•TV gekyk het	17-1
Watched a video/•Na 'n video gekyk het	-2
Watched a DVD	-3
Gone to a restaurant for a meal/•Na 'n restaurant vir 'n ete gegaan het	-4
Gone to a restaurant for coffee or a drink/•Na 'n restaurant vir koffie of 'n drankie gegaan het	-5
Gone to a bar/•Na 'n kroeg toe gegaan het	-6
Gone to a club/•Na 'n klub toe gegaan het	-7
Gone to the theatre/•Na die teater gegaan het	-8

Read a book/•'n Boek gelees het	-9
Relaxed/stayed at home/•Ontspan/by die huis gebly het	-10
Socialised at home/friend's home/•Sosiaal verkeer het by die huis/vriend/vriendin se huis	-11
Studied	-12
Gone shopping	-13
Other (SPECIFY)/•Ander (DUI AAN)	-14-

8.	How did you purchase your ticket for the movie today?	8.	Hoe het jy vandag jou kaartjie vir die rolprent gekoop?

1. READ OUT. **2. SINGLE MENTION.**	**1. LEES VOOR.** **2. EEN ANTWOORD**

Box office/counter/•Kaartjiekantoor/-toonbank	18-1
Ticketline/Ster-Kinekor Call Centre/•Ticketline/Ster-Kinekor Oproepsentrum	-2
Computicket	-3
Ster-Kinekor website/•Ster-Kinekor webwerf	-4
Self-service terminal	-5
Did not personally purchase ticket/•Het nie self 'n kaartjie gekoop nie	-6

Other (SPECIFY)/•Ander (DUI AAN)	-7

8A.	Which decision did you make first:

1. READ OUT.	**1. LEES VOOR.**
2. SINGLE MENTION.	**2. EEN ANTWOORD.**

I decided I wanted to come to the cinema **today,** but had not chosen a specific movie to see	19-1
I decided I wanted to come see a **specific** movie, and then chose where and when I would be able to see it	-2
I made the choice simultaneously: to see a specific movie today	-3

9a.	When did you decide that you were **going to see a movie** today?	9.	Wanneer het jy besluit na watter rolprent jy vandag gaan kyk?

1. READ OUT.	**1. LEES VOOR.**
2. SINGLE MENTION.	**2. EEN ANTWOORD.**

Today when you got here to this mall/complex	20-1
Today, before you got here/•Vandag, voordat jy hier aangekom het	-2
Yesterday/•Gister	-3

In the last week	-4
Longer ago than a week	-5

9b.	When did you decide **which movie** you were going to see today?	9.	Wanneer het jy besluit na watter rolprent jy vandag gaan kyk?

1. READ OUT. **2. SINGLE MENTION.**	**3. LEES VOOR.** **4. EEN ANTWOORD.**

Today when you got here/whilst in the queue/•Vandag toe jy hier aangekom het/terwyl jy in die tou gestaan het	21-1
Today, before you got here/•Vandag, voordat jy hier aangekom het	-2
Yesterday/•Gister	-3
Before yesterday/•Voor gister	-4

10.	Who came with you to the movie theatre today?	10.	Wie het vandag saam met jou na die rolprentteater gekom?

1. DO NOT PROMPT. **2. MULTIPLE MENTION POSSIBLE.**	**1. MOET NIE VOORSÊ NIE.** **2. MEER AS EEN ANTWOORD MOONTLIK.**

Friend/s/•Vriend/e	22-1	
Husband/wife/•Man/vrou	-2	
Children/•Kinders	-3	
Other family member/s/•Ander familielid/-lede	-4	
Partner/•Lewensmaat	-5	
Colleagues	-6	
Alone/•Alleen	-7	⇨ GO TO Q.12/•GAAN NA V.12
Other (SPECIFY)/•Ander (DUI AAN)	-8	

1. ASK ONLY THOSE WHO DID NOT GO TO THE MOVIES ALONE (CODES –01 TO –06) IN Q.10. **2. ALL OTHERS GO TO Q.12.**	**1. VRA NET DIEGENE WAT NIE ALLEEN NA DIE ROLPRENT-TEATER GEKOM HET NIE (KODE –01 TOT –06) IN V.10.** **2. AL DIE ANDER GAAN NA V.12.**

11a.	Including yourself, how many people in total came with you to the cinema today?	11a.	Met jou ingesluit, hoeveel mense in totaal het vandag saam met jou na die rolprentteater gekom?

RECORD EXACT NUMBER BELOW. **2. PLEASE USE LEADING 0'S.**	**1. NOTEER PRESIESE AANTAL HIERONDER.** **2. GEBRUIK ASSEBLIEF NULLE VOORAAN**

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…………	…………

11b.	And of these, how many were children under the age of 12?	11b.	En van hulle, hoeveel was kinders jonger as 12 jaar?

2. RECORD EXACT NUMBER BELOW. **3. PLEASE USE LEADING 0'S.** **4. RESPONSE IN Q.11b CANNOT BE HIGHER THAN THAT IN Q.11a.**	**3. NOTEER PRESIESE AANTAL HIERONDER.** **4. GEBRUIK ASSEBLIEF NULLE VOORAAN.** **5. ANTWOORD IN V.11b KAN NIE MEER WEES AS ANTWOORD IN V.11a NIE.**

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12.	<u>ASK ALL</u> How would you rate the movie you just saw (the actual film)? Please use the same scale as before, where "1" means you found it to be "very good" and "5" means you found it to be "very poor".	12.	VRA ALMAL Hoe sou jy die rolprent evalueer wat jy pas gesien het? Gebruik asseblief dieselfde skaal as voorheen, waar "1" beteken jy het dit "baie goed" gevind en "5" beteken jy het dit "baie swak" gevind.

1. **READ OUT ALL POINTS OF THE SCALE.** 2. **SINGLE MENTION.**	1. **LEES AL DIE PUNTE OP DIE SKAAL VOOR.** 2. **EEN ANTWOORD.**

Very good/•Baie goed	25-1
Good/•Goed	-2
Average/•Gemiddeld	-3
Poor/•Swak	-4
Very poor/•Baie swak	-5

13.	In total, how would you rate the range of refreshments on offer? Please use the same scale as before, where "1" means you found it to be "very good" and "5" means you found it to be "very poor".	13.	Hoe sou jy die reeks verversings in totaal evalueer? Gebruik asseblief dieselfde skaal as voorheen, waar "1" beteken jy het dit "baie goed" gevind en "5" beteken jy het dit "baie swak" gevind.

1. **READ OUT ALL POINTS OF THE SCALE.** 2. **SINGLE MENTION.**	1. **LEES AL DI E PUNTE OP DIE SKAAL VOOR.** 2. **EEN ANTWOORD.**

Very good/•Baie goed	26-1
Good/•Goed	-2
Average/•Gemiddeld	-3
Poor/•Swak	-4
Very poor/•Baie swak	-5

14a.	Did you buy any refreshments at the cinema? I am referring here to refreshments for yourself only or items to share. Which of the following best describes what happened today with regard to with refreshements purchase?	14a.	

14b.	What refreshments, if any, did you buy, or were bought for you, at the cinema? I am referring here to refreshments for yourself only or items to share.	14a.	Watter verversings, indien enige, het jy by die rolprentteater gekoop? Ek verwys hier net na verversings vir jouself of items om te deel.
	1. DO NOT PROMPT. **2. MULTIPLE MENTION POSSIBLE.** **3. RECORD ON GRID BELOW UNDER Q.14a.** **4. IF NONE IS MENTIONED (CODE –21), GO TO Q.15a.** **5. Even if didn't purchase personally, record this, and still record items consumed.**		**1. MOET NIE VOORSÊ NIE.** **MEER AS EEN ANTWOORD MOONTLIK.** **3. NOTEER OP TABEL HIERONDER ONDER V.14a.** **INDIEN GEEN GENOEM WORD (KODE –21), GAAN NA V.15a.**

14c.	**ASK FOR EACH ITEM MENTIONED IN Q.14a ABOVE.** You say that you bought ………… **(SPECIFY ITEM)**, how much did you pay for this?	14b.	**VRA VIR ELKE ITEM GENOEM IN V.14a HIERBO.** Jy sê dat jy ………. **(DUI ITEM AAN)** gekoop het. Hoeveel het jy hiervoor betaal?
	1. READ OUT ALL POINTS OF THE SCALE. **2. SINGLE MENTION.**		**1. LEES AL DIE PUNTE VAN DIE SKAAL VOOR.** **2. EEN ANTWOORD.**

	Q.14a/• V.14a	
Refreshments and food/• Verversings en eetgoed		
Did personally purchase and also consumed	27-1	Go to Q14 b&c
Did personally purchase for others but did not consume myself	-2	
Did not personally purchase refreshments but someone else bought for me at the cinema	-3	
Did not personally purchase refreshments and did not consume anything	-4	Skip to Q15

		Q.14c – Price Paid/•V.14c – Prys Betaal									
	Q.14b/• V.14b Bought/• Gekoop	Less than R5/• Minder as R5	R5 - R6	R7 - R8	R9-R10	R11-R12	R13-R14	R15-R16	R17-R18	R19-R20	More than R20/ • Meer as R20	Don't Know/ Unsure/• Weet Nie/ Onseker
Aero 100g	28-1	29-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
Anytime Nuts	-2	30-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
Anytime Raisins	-3	31-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
Anytime Treat Time (mint)	-4	32-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
Astro's 150g	-5	33-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
Astro's 24g	-6	34-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
Biltong	-7	35-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11

Coke - kids	-8	36-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
Coke - X Large	-9	37-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
Coke - Large	-10	38-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
Coke - Regular	-11	39-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
Coke - Small	-12	40-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
Jelly Tots 100g	-13	41-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
Jelly Tots small	-14	42-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
Juice - Regular	-15	43-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
Juice – Small	-16	44-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
Kit Kat Chunky	-17	45-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
Maynards Winegums 125g	-18	46-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
Maynards Winegums 150g	-19	47-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
Nachos	-20	48-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
Nutties 150g	-21	49-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
Popcorn - kids	-22	50-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
Popcorn - Large	-23	51-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
Popcorn - Regular	-24	52-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
Popcorn - Small	-25	53-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
Slush - kids	-26	54-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
Slush - Large	-27	55-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
Slush - Regular	-28	56-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11

Slush - Small	-29	57-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
Slush - X Large	-30	58-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
Smarties 150g	-31	59-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
Smarties 61g	-32	60-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
Water	-33	61-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
Whispers 150g	-34	62-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
Whispers 45g	-35	63-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
Other	-36	64-1	-2	-3	-4	-5	-6	-7	-8	-9	-10	-11
None/ •Geen	-37											

15a(i).	ASK ALL Thinking now <u>of yourself only</u>, in total, how much did you spend at the cinema today? I am referring here to the cost of both your ticket and any refreshments <u>that was bought for yourself</u>.

1. RECORD EXACT AMOUNT BELOW. **2. PLEASE USE LEADING 0s.**	**1. NOTEER PRESIESE BEDRAG HIERONDER.** **2. GEBRUIK ASSEBLIEF NULLE VOORAAN.**

Rands/•Rand		Cents/•Sent	-65-
Don't know/Not sure/•Weet nie/Onseker		⇨ **GO TO Q.16/•GAAN NA V.16**	

15a(ii).	ASK ALL Thinking again of <u>yourself only</u>, of the above amount (REFER 15a(i)) how much was spent on <u>your own</u> **movie ticket.**

3. RECORD EXACT AMOUNT BELOW. **4. PLEASE USE LEADING 0s.**	**3. NOTEER PRESIESE BEDRAG HIERONDER.** **4. GEBRUIK ASSEBLIEF NULLE VOORAAN.**

Rands/•Rand	Cents/•Sent	-66-
Don't know/Not sure/•Weet nie/Onseker		⇨ **GO TO Q.16/•GAAN NA V.16**

15a(iii).	ASK ALL Thinking again of <u>yourself only</u>, of the above amount (REFER 15a(i)) how much was spent on <u>your own</u> **refreshments.**

5. RECORD EXACT AMOUNT BELOW. **6. PLEASE USE LEADING 0s.**	**5. NOTEER PRESIESE BEDRAG HIERONDER.** **6. GEBRUIK ASSEBLIEF NULLE VOORAAN.**

Rands/•Rand		Cents/•Sent -67-	
Don't know/Not sure/•Weet nie/Onseker		⇨ **GO TO Q.16/•GAAN NA V.16**	

15a(ii) plus 15a(iii) must not be greater than value entered for 15a(i).

15b.	You said that you spent ……….. **(SPECIFY AMOUNT MENTIONED IN Q.15a(i) ABOVE).** How would you rate this movie experience in terms of its overall value for money? Please use a scale where "1" means it was "very good value for money" and "5" means it was "very poor value for money".	15b.	Jy het gesê dat jy ………. **(DUI AAN BEDRAG GENOEM IN V.15a HIERBO)** gespandeer het. Hoe sou jy hierdie rolprentondervinding volgens sy algehele waarde vir geld evalueer? Gebruik asseblief 'n skal waar "1" beteken dit was "baie goeie waarde vir geld" en "5" beteken dit was "baie swak waarde vir geld".

1. READ OUT ALL POINTS OF THE SCALE. **2. SINGLE MENTION.**	**1. LEES AL DIE PUNTE VAN DIE SKAAL VOOR.** **2. EEN ANTWOORD.**

Very good value for money/•Baie goeie waarde vir geld	68-1
Good value for money/•Goeie waarde vir geld	-2

Neither poor nor good value for money/•Nóg swak, nóg goeie waarde vir geld	-3
Poor value for money/•Swak waarde vir geld	-4
Very poor value for money/•Baie swak waarde vir geld	-5
Don't know/•Weet nie	-6

15c.	You said that you spent ……….. **(SPECIFY AMOUNT MENTIONED IN Q.15a(III) ABOVE)** **<u>on the movie ticket</u>**. How would you rate this movie experience in terms of its overall value for money? Please use a scale where "1" means it was "very good value for money" and "5" means it was "very poor value for money".		

3. READ OUT ALL POINTS OF THE SCALE. **4. SINGLE MENTION.**	**3. LEES AL DIE PUNTE VAN DIE SKAAL VOOR.** **4. EEN ANTWOORD.**

Very good value for money/•Baie goeie waarde vir geld	69-1
Good value for money/•Goeie waarde vir geld	-2
Neither poor nor good value for money/•Nóg swak, nóg goeie waarde vir geld	-3
Poor value for money/•Swak waarde vir geld	-4

Very poor value for money/•Baie swak waarde vir geld	-5
Don't know/•Weet nie	-6

15d.	You said that you spent ……….. **(SPECIFY AMOUNT MENTIONED IN Q.15a(III) ABOVE) <u>on refreshments</u>**. How would you rate this movie experience in terms of its overall value for money? Please use a scale where "1" means it was "very good value for money" and "5" means it was "very poor value for money".	15b.	Jy het gesê dat jy ………. **(DUI AAN BEDRAG GENOEM IN V.15a HIERBO)** gespandeer het. Hoe sou jy hierdie rolprentondervinding volgens sy algehele waarde vir geld evalueer? Gebruik asseblief 'n skal waar "1" beteken dit was "baie goeie waarde vir geld" en "5" beteken dit was "baie swak waarde vir geld".

5. READ OUT ALL POINTS OF THE SCALE. **6. SINGLE MENTION.**	**5. LEES AL DIE PUNTE VAN DIE SKAAL VOOR.** **6. EEN ANTWOORD.**

Very good value for money/•Baie goeie waarde vir geld	70-1
Good value for money/•Goeie waarde vir geld	-2
Neither poor nor good value for money/•Nóg swak, nóg goeie waarde vir geld	-3
Poor value for money/•Swak waarde vir geld	-4
Very poor value for money/•Baie swak waarde vir geld	-5
Don't know/•Weet nie	-6

16.	ASK ALL You said earlier that, if you had not come to a movie today, you would have .... **(SPECIFY RESPONSE/S FROM Q.7).** Compared with this activity, do you feel that coming to the movies today was .... **(READ OUT SCALE POINTS)**?	16.	VRA ALMAL Jy het vroeër gesê dat, indien jy nie vandag na 'n rolprent sou kom kyk het nie, jy .... **(DUI ANTWOORD/E UIT V.7 AAN).** In vergelyking met hierdie aktiwiteit, voel jy dit was .... **(LEES SKAALPUNTE VOOR)** om vandag na 'n rolprent te kom kyk?

1. READ OUT ALL THE SCALE POINTS. **2. SINGLE MENTION.**	**1. LEES ALLE SKAALPUNTE VOOR.** **2. EEN ANTWOORD.**

Much better value for money/•Heelwat beter waarde vir geld	71-1
Somewhat better value for money/•Redelik beter waarde vir geld	-2
The same value for money/•Dieselfde waarde vir geld	-3
Somewhat less value for money/•Redelik minder waarde vir geld	-4
Much less value for money/•Heelwat minder waarde vir geld	-5

17.	Of every R100 you spend on entertainment, approximately what proportion of this do you spend on outings to the cinema?	17.	Van elke R100 wat jy op vermaak spandeer, ongeveer watter persentasie hiervan spandeer jy met besoeke by die rolprentteater?

1. RECORD EXACT % BELOW IF PERCENTAGE IS GIVEN. **2. IF AMOUNT IS GIVEN IN RANDS/CENTS, RECORD BELOW AND WORK OUT %.** **3. SINGLE MENTION.**	**1. NOTEER PRESIESE % ONDERAAN AS PERSENTASIE GEGEE WORD.** **2. AS BEDRAG IN RAND/SENT GEGEE WORD, NOTEER HIERONDER EN WERK % UIT.** **3. EEN ANTWOORD.**

Rands/•Rand		Cents/•Sent 72-	
% -73-			
Don't know/Not sure/• Weet nie/Onseker			-2-

18a.	What, if anything, did you do just before coming to this movie?	18a.	Wat, indien enigiets, het jy gedoen net voor jy na die rolprent kom kyk het?

1. DO NOT PROMPT. **2. MULTIPLE MENTION POSSIBLE.** **3. READ ON GRID UNDER Q.18a.**	**1. MOET NIE VOORSÊ NIE.** **2. MEER AS EEN ANTWOORD MOONTLIK.** **3. LEES OP TABEL ONDER V.18a.**

18b.	What, if anything, do you plan to do now that the movie is finished?	18b.	Wat, indien enigiets, beplan jy om te doen noudat die rolprent verby is?

1. DO NOT PROMPT. **2. MULTIPLE MENTION POSSIBLE.** **3. READ ON GRID UNDER Q.18b.**	**1. MOET NIE VOORSÊ NIE.** **2. MEER AS EEN ANTWOORD MOONTLIK.** **3. LEES OP TABEL ONDER V.18b.**

	Q.18a/•V.18a	Q.18b/•V.18b
	MMP	MMP
Out for a meal	74-1	75-1
Out for drink/coffee	-2	-2
Work/•Werk	-3	-3
Window shop/•Winkelkykery	-4	-4
Shop/•Inkopies	-5	-5
Was at home/ Going home	-6	-6
Visit family/friends/•Besoek familie/vriende	-7	-7
Studying	-8	-8

School/ University/ Technicon/ Lectures etc.	-9	-9
Other (SPECIFY)/•Ander (DUI AAN)	-10	-10
Nothing/•Niks	-11	-11

19a.	Which of the following clubs do you belong to?	19a.	Aan watter van die volgende klubs behoort jy?

1. READ OUT. **2. MULTIPLE MENTION POSSIBLE.** **3. READ ON GRID BELOW UNDER Q.19a.** **4. IF NONE, THEN GO TO Q.20.**	**1. LEES VOOR.** **2. MEER AS EEN ANTWOORD MOONTLIK.** **3. LEES OP TABEL HIERONDER ONDER V.19a.** **4. INDIEN GEEN, GAAN DAN NA V.20.**

19b.	For how long have you been a member of .... **(ASK FOR EACH CLUB MENTIONED IN Q.19a ABOVE)**?	19b.	Vir hoe lank is jy al 'n lid van .... **(VRA VIR ELKE KLUB GENOEM IN V.18a HIERBO)?**

	Q.19a/ •V.19a	Q.19b/•V.19b							
	Club/ •*Klub*	Less Than One Year/ •Minder As Een Jaar	1 – 2 Years/• Jaar	3 – 4 Years/• Jaar	5 – 6 Years/• Jaar	7 – 8 Years/• Jaar	9 – 10 Years/• Jaar	**More Than 10 Years/•** Meer as 10 Jaar	Don't Know **DO NOT READ OUT/•** Weet Nie **(MOET NIE VOORLEES NIE)**
	MMP								
Ster-Kinekor Movie Club/ •Rolprentklub	76-1	77-1	-2	-3	-4	-5	-6	-7	-8
Vitality/Discovery Movie Club/ •Rolprentklub	-2	78-1	-2	-3	-4	-5	-6	-7	-8
Nu Metro Movie Club/ •Rolprentklub	-3	79-1	-2	-3	-4	-5	-6	-7	-8
Edgars Movie Club/ •Rolprentklub	-4	80-1	-2	-3	-4	-5	-6	-7	-8
None/•Geen	-5	GO TO Q.20/•GAAN NA V.20							

20.	I'm going to read out to you a number of elements that make up a movie experience. For each element, please tell me how you would rate your movie experience today, using a scale from 1 to 5, where "1" means you think it was "extremely good" and "5" means you think it was "extremely poor". How would you rate the ....?	20.	Ek gaan vir jou 'n aantal elemente voorlees waaruit 'n rolprent-ondervinding bestaan. Vir elke element moet jy asseblief vir my sê hoe jy jou rolprentondervinding vandag evalueer, en gebruik 'n skaal van 1 tot 5, waar "1" beteken jy dink dit was "uiters goed" en "5" beteken jy dink dit was "uiters swak". Hoe sou jy die .... evalueer?

1. READ OUT ALL POINTS OF THE SCALE. **2. SINGLE MENTION.** **3. FOR STATEMENT 3, PLEASE REFER TO ANSWER IN Q.8.**	**1. LEES ALLE PUNTE OP DIE SKAAL VOOR.** **2. EEN ANTWOORD.** **3. VIR STELLING 3, VERWYS ASSEBLIEF NA ANTWOORD IN V.8.**

	Extremely good/• Uiters goed	Good /• Goed	Neither good nor poor/• Nóg goed, nóg swak	Poor/• Swak	Extremely poor/• Uiters swak	**Don't know/ • Weet nie**	Not Applicable (****)
Overall look and feel of the cinema/•Algehele voorkoms en gevoel	81-1	-2	-3	-4	-5	-6	-7

van die teater							
Movie information available/•Beskikbare rolprentinligting	82-1	-2	-3	-4	-5	-6	-7
Queuing for tickets **OR** Ticketline/Computicket/ Ster-Kinekor website/Call Centre **(SEE Q.8)**/•Toustaan vir kaartjies **OF** Ticketline/Computicket/Ster-Kinekor webwerf	83-1	-2	-3	-4	-5	-6	-7
Box office (counter) staff/•Kaartjiekantoor-/toonbankpersoneel	84-1	-2	-3	-4	-5	-6	-7
Choice of movies available/•Keuse van beskikbare rolprente	85-1	-2	-3	-4	-5	-6	-7
Queuing for refreshments/ •Toustaan vir verversings	86-1	-2	-3	-4	-5	-6	-7
Servers at refreshment counters/•Bedieners by verversingstoonbanke	87-1	-2	-3	-4	-5	-6	-7
Choice of							

refreshments available/•Keuse van beskikbare verversings	88-1	-2	-3	-4	-5	-6	-7
Booking of seats: reserved	89-1	-2	-3	-4	-5	-6	-7
Overall impression of foyer	90-1	-2	-3	-4	-5	-6	-7
Going into the cinema and finding your seat/•Binnegaan van teater en jou sitplek kry	91-1	-2	-3	-4	-5	-6	-7
Overall impression of cinema/•Algehele indruk van rolprentteater	92-1	-2	-3	-4	-5	-6	-7
Comfort of the seats/•Gemak van die sitplekke	93-1	-2	-3	-4	-5	-6	-7
Picture quality/ •Beeldkwaliteit	94-1	-2	-3	-4	-5	-6	-7
Sound quality/ •Klankkwaliteit	95-1	-2	-3	-4	-5	-6	-7
Trailers/•Voorprente	96-1	-2	-3	-4	-5	-6	-7
Advertisements/ •Advertensies	97-1	-2	-3	-4	-5	-6	-7

Toilet facilities/ •Toiletfasiliteite	98-1	-2	-3	-4	-5	-6	-7

SECTION C: BRAND		AFDELING C: BRAND
I would just like to ask you a few questions about Ster-Kinekor.		

21.	Are there any changes specific to Ster-Kinekor that you know of, that came about in the past 3-4 months?
22.	If yes, please tell me more about these changes.

	Q21	Q22 (open-ended)
Yes	99-1	-100-
No	-2	-

23.	Which Ster-Kinekor cinemas have you been to in the past 3-4 months?

Junction	Tick if visited	Classic	Tick if visited	Nouveau	Tick if visited
Bayside	101-1	Cavendish Commercial	-20	Brooklyn Nouveau	-25
Bridge PE	-2	Cresta	-21	Cavendish Nouveau	-26
Cape Gate	-3	Eastgate	-22	Rosebank Nouveau	-27
Carlton	-4	Gateway Commercial	-23		
East Rand Mall	-5	Sandton	-24		
Fourways	-6				
Kenilworth	-7				
Key West	-8				
Kollannade	-9				
Musgrave	-10				
Northgate	-11				
River Square	-12				
Rosebank The Zone	-13				
Scottsville	-14				
Somerset West Mall	-15				
Southgate	-16				
Sterland	-17				
Vincent Park	-18				

Westgate	-19				

ONLY ASK RESPONDENTS Q24 IF THEY HAVE TICKS IN MORE THAN ONE BRAND COLUMN

24.	Have you noticed any difference between any of these cinemas specifically`
25.	If yes, please tell me more about these differences.

	Q24	Q25 (open-ended)
Yes	102-1	-103-
No	-2	Go to Q26

26.	Have you heard of any of these Ster-Kinekor cinema brands (READ OUT)
27.	I am going to read you out a list of statements. Please tell me which of these brands, if any, you associate with each statement. (MULTI-MENTIONS POSSIBLE)

	Classic	Junction	Cinema Nouveau
YES	104-1	105-1	106-1
NO	-2	-2	-2
Regular ticket prices	107-1	-2	-3
More expensive tickets	108-1	-2	-3

Cheaper tickets	109-1	-2	-3
A cinema where everyone can go	110-1	-2	-3
A classy cinema	111-1	-2	-3
A cinema for discerning moviegoers	112-1	-2	-3
An exclusive cinema	113-1	-2	-3
A cinema that offers lots of choice of movie titles	114-1	-2	-3
A cinema that offers limited choice of movie titles	115-1	-2	-3
A cinema that offers unusual movies	116-1	-2	-3
A cinema that offers lots of choice of refreshments	117-1	-2	-3
A cinema that offers limited choice of refreshments	118-1	-2	-3

SECTION D: DEMOGRAPHICS	**AFDELING D: PERSOONLIKE BESONDERHEDE**
The interview is almost complete. I would just like to ask you a few questions about yourself. I would also like to assure you again that all your answers will remain strictly confidential.	Die onderhoud is byna voltooi. Ek wil net nog 'n paar vrae oor jouself vra. Ek wil jou weer verseker dat al jou antwoorde streng vertroulik bly.

28.	RACE **INTERVIEWER, PLEASE RECORD.**	21.	RAS **ONDERHOUDVOERDER, NOTEER ASSEBLIEF.**

Black/•Swart	119-1
Asian/•Asiër	-2
Coloured/•Kleurling	-3
White/•Blank	-4

29.	**GENDER** **INTERVIEWER, PLEASE RECORD.**	22.	**GESLAG** **ONDERHOUDVOERDER, NOTEER ASSEBLIEF.**

Male/•Manlik	120-1
Female/•Vroulik	-2

30.	**LIFE CYCLE** Please tell me which statement in each of the following categories describes you.	23.	**LEWENSIKLUS** Sê asseblief vir my watter stelling in elk van die volgende kategorieë jou beskryf.

1. READ OUT. **2. CATEGORY A: SINGLE MENTION.** **3. CATEGORY B: SINGLE MENTION.** **4. CATEGORY C: MULTIPLE MENTION POSSIBLE.**	**1. LEES VOOR.** **2. KATEGORIE A: EEN ANTWOORD.** **3. KATEGORIE B: EEN ANTWOORD.** **4. KATEGORIE C: MEER AS EEN ANTWOORD MOONTLIK.**

CATEGORY A/ •KATEGORIE A		**CATEGORY B/ •KATEGORIE B**		**CATEGORY C/ •KATEGORIE C**	
	121		**122**		**123**
Single, never married/•	-1	Living with parents/•	-1	Without children/•	-1
Ongetroud, nooit getroud nie	-2	Woon by ouers	-2	Sonder kinders	-2
Single, divorced/separated/•	-3	No longer living with parents/•	-3	Have children under 12 years/•	-3
Ongetroud, geskei/vervreemd	-4	***Woon nie meer by ouers nie***	-4	***Het kinders jonger as 12 jaar***	-4
Married/Living with	-5			Have children 12 - 13	-5

partner/ •Getroud/Woon saam met lewensmaat				years/• Het kinders 12 – 13 jaar	
Less than 3 years/•Minder as 3 jaar	-6				
3 – 6 years/•jaar	-4				
7 – 12 years/•jaar	-5			Have children 14 – 18 years/• Het kinders 14 – 18 jaar	-6
13 – 19 years/•jaar	-9				
20 – 29 years/•jaar	-10				
30 years or more/•30 jaar of langer	-11			Have children older than 18 years/• Het kinders ouer as 18 jaar	-7
Widowed/ •Weduwee/ wewenaar	-12				

31.	**LANGUAGE** What language do you speak most frequently at home?	24.	TAAL ***Watter taal praat jy die meeste by die huis?***

1. DO NOT PROMPT. **2. SINGLE MENTION.**	**1. MOET NIE VOORSÊ NIE.** **2. EEN ANTWOORD.**

English/•Engels	124-1
Afrikaans	-2
North Sotho/•Noord-Sotho	-3
South Sotho/•Suid-Sotho	-4
Tswana	-5
Xhosa	-6
Zulu/•Zoeloe	-7
Other (SPECIFY)/•Ander (DUI AAN) …………………………………	-8

	PERSONAL INCOME		PERSOONLIKE INKOMSTE
32.	Please tell me what your total personal monthly income is. By this I mean the income on your payslip that you personally take home, before deductions and other expenses.	25.	Sê asseblief vir my wat jou totale persoonlike maandelikse inkomste is. Hiermee bedoel ek die inkomste op jou betaalstrokie wat jy persoonlik huis toe neem, voor aftrekkings en ander uitgawes.

1. **HAND QUESTIONNAIRE TO RESPONDENT FOR SELF-COMPLETION IF NECESSARY.** 2. **SINGLE MENTION.**	1. **GEE VRAELYS VIR RESPONDENT OM SELF TE VOLTOOI INDIEN NODIG.** 2. **EEN ANTWOORD.**

1.	Not working/•Werk nie	125-1
2.	Less than R1 999 per month/•Minder as R1 999 per maand	-2
3.	R2 000 – R4 999 per month/•per maand	-3
4.	R5 000 – R9 999 per month/•per maand	-4
5.	R10 000 – R19 999 per month/•per maand	-5
6.	R20 000 – R24 999 per month/•per maand	-6
7.	R25 000 – R29 999 per month/•per maand	-7
8.	R30 000 or more per month/•of meer per maand	-8
9.	Refuse/•Geweier	-9

33.	Some of these things might sound strange to you, but we need to find out about them to understand a bit more about your lifestyle. Please tell me which, if any, are presently in your household.	26.	Sommige van hierdie dinge mag vreemd klink, maar ons moet 'n bietjie meer uitvind om jou lewenstyl te verstaan. Sê asseblief vir my watter daarvan, indien enige, tans in jou huishouding is.

1. **READ OUT.** 2. **MULTIPLE MENTION POSSIBLE.** 3. **DON'T READ THE STATEMENTS IN BOLD.**	1. **LEES VOOR.** 2. **MEER AS EEN ANTWOORD MOONTLIK.** 3. **MOET NIE DIE VETGEDRUKTE STELLINGS LEES NIE.**

1. Hot running water/•Warm lopende water	126-1	16. No or only one radio/•Geen of net een radio	-15
2. Fridge/freezer/•Yskas/vrieskas	-2	17. Hi-fi/music centre/•Hoëtroustel of musieksentrum	-16
3. Microwave oven/•Mikrogolfoond	-3	18. Living in a non-urban area outside of Gauteng or Western	-17
4. Flush toilet in house or on plot/•Spoeltoilet in huis of op erf	-4	Cape/•Woon in 'n nie-stedelike gebied buite Gauteng of Wes-Kaap	-18
5. A full-time domestic servant/ •'n Voltydse huishulp	-5		-19
6. VCR in household/•Videomasjien in huis	-6	19. Built-in kitchen sink/•Ingeboude kombuisopwasbak	-20
7. Vacuum cleaner/floor polisher/ •Vloerpoleerder/stofsuier	-7	20. Home security service/•Huissekuriteitdiens	-21
8. A cellular phone in household/•'n Selfoon in die huis	-8	21. A deep freezer/•'n Vrieskas	-22

9. Home is a traditional hut/•Huis is 'n tradisionele hut	-9	22. Water in home or on stand/•Water in huis of op erf	-23
11. A computer at home/•'n Rekenaar by die huis	-10	23. A dishwasher machine/•'n Skottelgoedwasser	-24
12. An electric stove/•'n Elektriese stoof	-11	24. Electricity/•Elektrisiteit	-25
13. A TV set/•'n TV-stel	-12	25. A sewing machine/•'n Naaimasjien	-26
14. A tumble dryer/•'n Tuimeldroër	-13	26. Live in Gauteng/•Woon in Gauteng	-27
15. A Telkom home telephone/•'n Telkom huistelefoon	-14	27. Live in Western Cape/•Woon in die Wes-Kaap	-28
		28. One or more motor vehicles/•Een of meer motorvoertuie	-29

THANK RESPONDENT AND CLOSE INTERVIEW	**BEDANK RESPONDENT EN SLUIT ONDERHOUD AF.**
I hereby certify that this interview has been carried out by me in accordance the instructions I received from Yellowwood Brand Architects, and has been checked.	Hiermee verklaar ek dat ek hierdie onderhoud uitgevoer het in ooreenstemming met die instruksies wat ek van Yellowwood Brand Architects ontvang het, en dat dit nagegaan is.

SIGNED/•GETEKEN:

DATE/•DATUM:

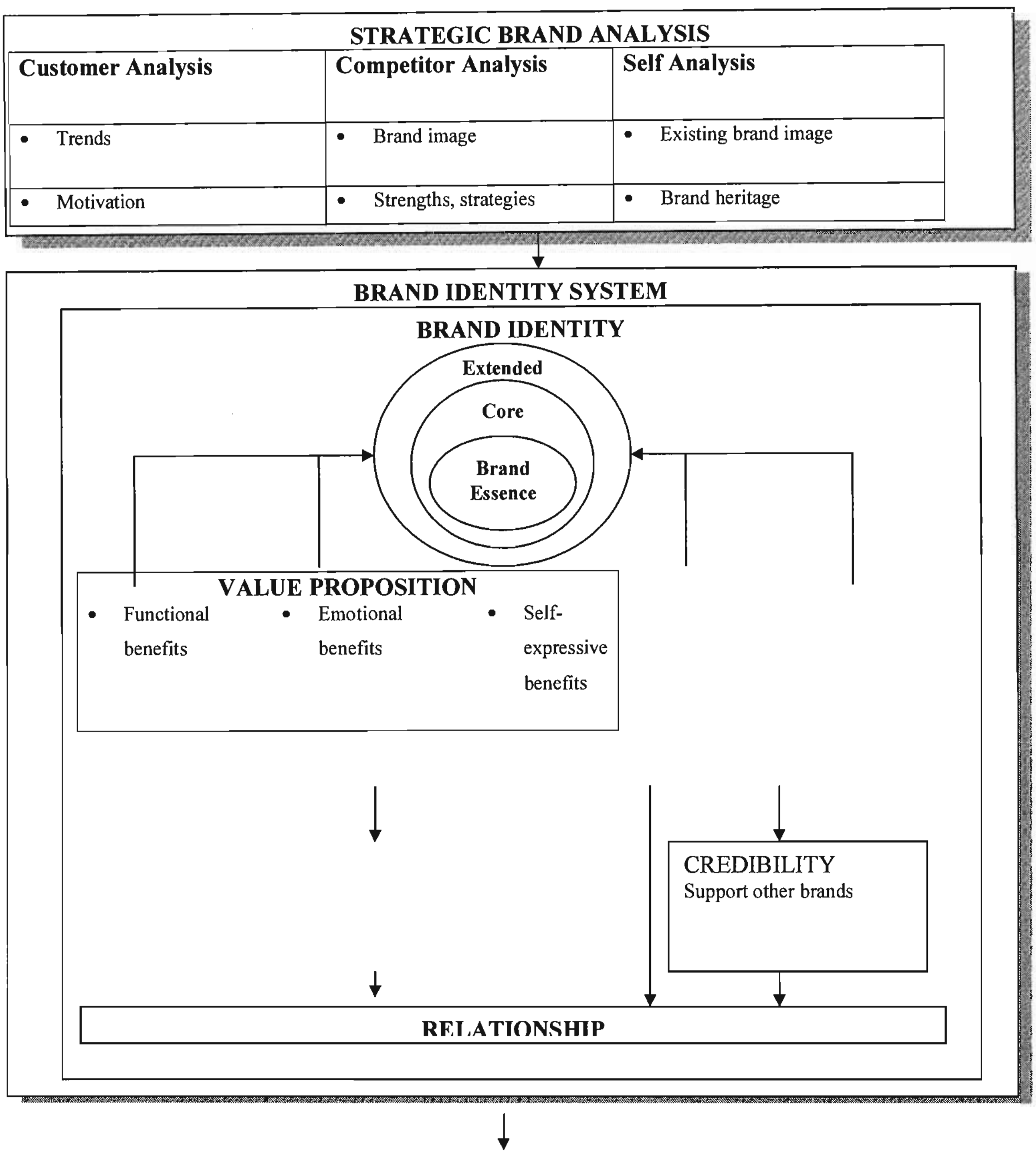
VENUE/•PLEK:

TIME/•TYD:

	BUSINESS MANAGER	**SUPPORT MANAGER**	**DPU**
DATE:			
SIGNATURE:			

APPENDIX B

STRATEGIC BRAND ANALYSIS


STRATEGIC BRAND ANALYSIS
Customer Analysis
• Trends
• Motivation
Competitor Analysis
• Brand image
• Strengths, strategies
Self Analysis
• Existing brand image
• Brand heritage
BRAND IDENTITY SYSTEM
BRAND IDENTITY
Extended
Core
Brand Essence
VALUE PROPOSITION
• Functional benefits
• Emotional benefits
• Self-expressive benefits
CREDIBILITY
Support other brands
RELATIONSHIP

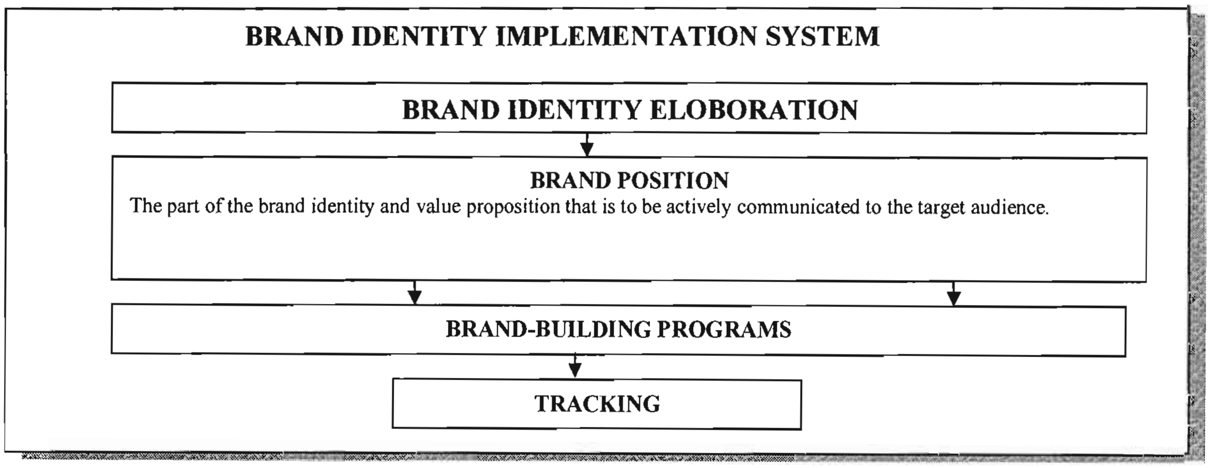


Fig. B.1 Brand Identity Planning Model [Source: Aaker(1991)]

APPENDIX C

SAMPLE SELECTIONS

	Site brand	Total	School holidays																					
			Mon			Wed			Thurs			Tues			Fri			Sat			Sun			
			9%	9%	9%	9%	9%	9%	9%	9%	9%	22%	22%	22%	16%	16%	16%	23%	23%	23%	13%	13%	13%	
			Before 12h00	12h01-17h00	17h01 On	Before 12h00	12h01-17h00	17h01 On	Before 12h00	12h01-17h00	17h01 On	Before 12h00	12h01-17h00	17h01 On	Before 12h00	12h01-17h00	17h01 On	Before 12h00	12h01-17h00	17h01 On	Before 12h00	12h01-17h00	17h01 On	
Site name	**Site brand**		25%	36%	39%	25%	36%	39%	25%	36%	39%	25%	36%	39%	25%	36%	39%	25%	36%	39%	25%	36%	39%	
Cavendish Commercial	Classic	30	0.0	1.0	0.0	0.0	1.0	0.0	0.0	0.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	2.0	1.0	1.0	0.0	15.0
Eastgate	Classic	30	0.0	1.0	0.0	0.0	0.0	1.0	0.0	1.0	0.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	2.0	1.0	0.0	1.0	15.0
Gateway Commercial	Classic	30	0.0	0.0	1.0	1.0	0.0	0.0	0.0	1.0	0.0	0.0	2.0	1.0	2.0	1.0	1.0	1.0	1.0	1.0	0.0	1.0	1.0	15.0
Sandton	Classic	30	1.0	0.0	0.0	0.0	1.0	0.0	1.0	0.0	1.0	0.0	1.0	2.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	0.0	1.0	15.0
Tyger Valley	Classic	30	0.0	1.0	1.0	0.0	0.0	1.0	1.0	0.0	0.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	0.0	1.0	1.0	15.0
Bayside	Junction	30	0.0	1.0	0.0	0.0	1.0	0.0	0.0	0.0	1.0	0.0	1.0	2.0	1.0	1.0	1.0	2.0	1.0	1.0	1.0	0.0	1.0	15.0
Bridge PE	Junction	28	1.0	0.0	0.0	0.0	0.0	1.0	1.0	0.0	0.0	1.0	1.0	2.0	0.0	1.0	1.0	1.0	1.0	1.0	0.0	1.0	1.0	14.0
Cape Gate	Junction	30	0.0	1.0	1.0	0.0	1.0	1.0	0.0	1.0	0.0	1.0	1.0	1.0	1.0	1.0	1.0	0.0	1.0	1.0	1.0	1.0	0.0	15.0
Carlton	Junction	30	1.0	1.0	0.0	0.0	0.0	1.0	0.0	0.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	0.0	2.0	1.0	1.0	0.0	1.0	15.0
East Rand Mall	Junction	30	1.0	0.0	0.0	1.0	0.0	1.0	1.0	1.0	0.0	0.0	1.0	2.0	0.0	1.0	1.0	0.0	1.0	2.0	1.0	1.0	0.0	15.0
Fourways	Junction	30	0.0	0.0	1.0	1.0	0.0	0.0	0.0	1.0	1.0	1.0	2.0	1.0	0.0	1.0	1.0	1.0	1.0	1.0	0.0	1.0	1.0	15.0
Kenilworth	Junction	30	0.0	0.0	1.0	1.0	0.0	0.0	0.0	0.0	1.0	1.0	1.0	1.0	0.0	2.0	1.0	1.0	1.0	2.0	1.0	1.0	0.0	15.0
Key West	Junction	29	0.0	1.0	0.0	1.0	0.0	0.0	0.0	1.0	0.0	1.0	1.0	2.0	0.0	1.0	1.0	1.0	1.0	1.0	0.0	1.0	2.0	15.0
Kollannade	Junction	30	0.0	0.0	1.0	0.0	0.0	1.0	0.0	1.0	1.0	1.0	2.0	1.0	1.0	0.0	1.0	0.0	2.0	1.0	0.0	1.0	1.0	15.0
Musgrave	Junction	30	1.0	0.0	0.0	0.0	1.0	0.0	0.0	0.0	1.0	1.0	1.0	2.0	0.0	1.0	1.0	1.0	2.0	1.0	0.0	1.0	1.0	15.0
Northgate	Junction	30	0.0	1.0	0.0	1.0	0.0	1.0	0.0	1.0	1.0	2.0	0.0	1.0	1.0	0.0	1.0	1.0	1.0	1.0	0.0	1.0	1.0	15.0
River Square	Junction	28	0.0	0.0	1.0	1.0	0.0	1.0	0.0	0.0	0.0	1.0	1.0	1.0	1.0	1.0	0.0	0.0	2.0	2.0	1.0	1.0	0.0	14.0
Rosebank The Zone	Junction	30	0.0	0.0	1.0	0.0	1.0	0.0	1.0	0.0	0.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	2.0	0.0	1.0	1.0	15.0
Scottsville	Junction	28	1.0	0.0	0.0	0.0	1.0	1.0	0.0	0.0	1.0	0.0	1.0	2.0	0.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	0.0	14.0
Somerset West Mall	Junction	30	1.0	0.0	1.0	0.0	0.0	1.0	0.0	1.0	0.0	1.0	1.0	1.0	1.0	0.0	1.0	1.0	1.0	2.0	0.0	1.0	1.0	15.0
Southgate	Junction	30	0.0	0.0	1.0	1.0	0.0	0.0	1.0	0.0	1.0	1.0	1.0	1.0	1.0	1.0	0.0	1.0	1.0	2.0	0.0	1.0	1.0	15.0
Sterland	Junction	30	0.0	1.0	1.0	0.0	1.0	1.0	1.0	0.0	1.0	1.0	1.0	0.0	0.0	1.0	1.0	1.0	1.0	1.0	1.0	0.0	1.0	15.0
Vincent Park	Junction	28	0.0	0.0	1.0	0.0	0.0	1.0	0.0	1.0	0.0	1.0	2.0	1.0	0.0	1.0	1.0	2.0	1.0	1.0	0.0	1.0	0.0	14.0
Westgate	Junction	29	1.0	1.0	0.0	0.0	1.0	0.0	1.0	0.0	0.0	1.0	1.0	1.0	0.0	1.0	1.0	1.0	1.0	1.0	1.0	0.0	1.0	14.0
Brooklyn Nouveau	Nouveau	30	0.0	0.0	1.0	0.0	0.0	1.0	1.0	1.0	0.0	1.0	1.0	1.0	0.0	1.0	2.0	1.0	1.0	1.0	0.0	1.0	1.0	15.0
Cavendish Nouveau	Nouveau	30	0.0	1.0	1.0	0.0	1.0	0.0	0.0	0.0	1.0	1.0	1.0	1.0	1.0	0.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	15.0
Rosebank Nouveau	Nouveau	30	1.0	0.0	0.0	1.0	1.0	0.0	0.0	0.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	0.0	1.0	15.0
		800.																						400.0
		total	9.0	11.0	14.0	9.0	11.0	14.0	9.0	11.0	14.0	23.0	30.0	33.0	17.0	24.0	25.0	24.0	31.0	35.0	14.0	20.0	21.0	400.0
				34.0			34.0			34.0			86.0			67.0			90.0			55.0		
			26%	32%	41%	26%	32%	41%	26%	32%	41%	27%	35%	38%	25%	36%	39%	27%	34%	39%	25%	36%	38%	
		actual		9%			9%			9%			22%			17%			23%			14%		
		quota		9%			9%			9%			22%			16%			23%			13%		
			26%	35%	39%		25%	36%	39%															

Table C.1. Sample Selections – Holidays

	Site brand	Total	Term time																				
			Mon			Wed			Thurs			Tues			Fri			Sat			Sun			
			9%	9%	9%	9%	9%	9%	9%	9%	9%	22%	22%	22%	16%	16%	16%	23%	23%	23%	13%	13%	13%	
			Before 12h00	12h01-17h00	17h01 On	Before 12h00	12h01-17h00	17h01 On	Before 12h00	12h01-17h00	17h01 On	Before 12h00	12h01-17h00	17h01 On	Before 12h00	12h01-17h00	17h01 On	Before 12h00	12h01-17h00	17h01 On	Before 12h00	12h01-17h00	17h01 On	
Site name	**Site brand**		25%	36%	39%	25%	36%	39%	25%	36%	39%	25%	36%	39%	25%	36%	39%	25%	36%	39%	25%	36%	39%	
Cavendish Commercial	Classic	30	0.0	1.0	0.0	0.0	1.0	0.0	0.0	0.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	2.0	1.0	0.0	1.0	15.0
Eastgate	Classic	30	0.0	1.0	0.0	0.0	0.0	1.0	0.0	1.0	0.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	2.0	0.0	1.0	1.0	15.0
Gateway Commercial	Classic	30	0.0	0.0	1.0	0.0	0.0	1.0	0.0	1.0	0.0	1.0	1.0	1.0	1.0	1.0	2.0	1.0	1.0	1.0	0.0	1.0	1.0	15.0
Sandton	Classic	30	0.0	1.0	0.0	0.0	1.0	0.0	1.0	0.0	1.0	0.0	1.0	2.0	1.0	1.0	1.0	0.0	2.0	1.0	1.0	0.0	1.0	15.0
Tyger Valley	Classic	30	0.0	1.0	1.0	0.0	0.0	1.0	1.0	0.0	0.0	1.0	1.0	1.0	0.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	0.0	14.0
Bayside	Junction	30	0.0	1.0	0.0	0.0	1.0	0.0	0.0	0.0	1.0	0.0	1.0	2.0	1.0	1.0	1.0	2.0	1.0	1.0	0.0	1.0	1.0	15.0
Bridge PE	Junction	28	1.0	0.0	0.0	0.0	0.0	1.0	0.0	1.0	0.0	1.0	2.0	1.0	0.0	1.0	1.0	1.0	1.0	1.0	0.0	1.0	1.0	14.0
Cape Gate	Junction	30	0.0	1.0	1.0	1.0	1.0	0.0	1.0	0.0	0.0	1.0	1.0	1.0	1.0	0.0	2.0	0.0	1.0	1.0	1.0	0.0	2.0	16.0
Carlton	Junction	30	1.0	1.0	0.0	0.0	0.0	1.0	0.0	0.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	0.0	2.0	1.0	1.0	0.0	1.0	15.0
East Rand Mall	Junction	30	1.0	0.0	0.0	1.0	0.0	1.0	1.0	1.0	0.0	0.0	1.0	2.0	0.0	1.0	1.0	0.0	1.0	2.0	1.0	1.0	0.0	15.0
Fourways	Junction	30	0.0	0.0	1.0	1.0	0.0	0.0	1.0	0.0	1.0	1.0	2.0	1.0	0.0	1.0	1.0	1.0	1.0	1.0	0.0	1.0	1.0	15.0
Kenilworth	Junction	30	0.0	0.0	1.0	0.0	1.0	0.0	0.0	0.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	2.0	1.0	1.0	0.0	15.0
Key West	Junction	29	0.0	0.0	1.0	1.0	0.0	0.0	0.0	1.0	0.0	1.0	1.0	2.0	1.0	0.0	1.0	1.0	1.0	1.0	0.0	1.0	1.0	14.0
Kollannade	Junction	30	0.0	0.0	1.0	1.0	0.0	0.0	0.0	1.0	1.0	1.0	2.0	1.0	1.0	0.0	1.0	1.0	1.0	1.0	1.0	1.0	0.0	15.0
Musgrave	Junction	30	1.0	0.0	0.0	1.0	0.0	0.0	0.0	0.0	1.0	1.0	1.0	2.0	0.0	1.0	1.0	1.0	2.0	1.0	0.0	1.0	1.0	15.0
Northgate	Junction	30	0.0	1.0	0.0	0.0	1.0	1.0	0.0	1.0	1.0	1.0	1.0	1.0	0.0	1.0	1.0	1.0	1.0	1.0	0.0	1.0	1.0	15.0
River Square	Junction	28	0.0	0.0	1.0	0.0	0.0	2.0	0.0	0.0	0.0	1.0	1.0	1.0	1.0	1.0	0.0	0.0	2.0	2.0	1.0	1.0	0.0	14.0
Rosebank The Zone	Junction	30	1.0	0.0	0.0	0.0	1.0	0.0	0.0	0.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	0.0	2.0	2.0	0.0	1.0	1.0	15.0
Scottsville	Junction	28	1.0	0.0	0.0	1.0	1.0	0.0	0.0	0.0	1.0	0.0	1.0	2.0	0.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	0.0	14.0
Somerset West Mall	Junction	30	1.0	0.0	1.0	0.0	0.0	1.0	0.0	1.0	0.0	1.0	1.0	1.0	1.0	1.0	0.0	1.0	2.0	1.0	0.0	1.0	1.0	15.0
Southgate	Junction	30	0.0	0.0	1.0	0.0	1.0	0.0	1.0	1.0	0.0	0.0	1.0	2.0	1.0	1.0	0.0	1.0	1.0	2.0	0.0	1.0	1.0	15.0
Sterland	Junction	30	0.0	1.0	1.0	1.0	0.0	1.0	1.0	1.0	0.0	0.0	1.0	1.0	0.0	1.0	1.0	1.0	1.0	1.0	1.0	0.0	1.0	15.0
Vincent Park	Junction	28	0.0	0.0	1.0	0.0	0.0	1.0	0.0	0.0	1.0	2.0	1.0	1.0	0.0	1.0	1.0	2.0	1.0	1.0	0.0	1.0	0.0	14.0
Westgate	Junction	29	1.0	1.0	0.0	0.0	1.0	0.0	1.0	0.0	0.0	1.0	1.0	1.0	0.0	1.0	1.0	0.0	1.0	2.0	1.0	0.0	2.0	15.0
Brooklyn Nouveau	Nouveau	30	0.0	1.0	0.0	0.0	0.0	1.0	1.0	1.0	0.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	0.0	1.0	15.0
Cavendish Nouveau	Nouveau	30	0.0	1.0	1.0	0.0	1.0	0.0	0.0	1.0	0.0	1.0	1.0	1.0	1.0	0.0	1.0	1.0	1.0	1.0	0.0	1.0	2.0	15.0
Rosebank Nouveau	Nouveau	30	0.0	1.0	0.0	0.0	1.0	1.0	0.0	0.0	1.0	0.0	2.0	1.0	0.0	1.0	2.0	1.0	1.0	1.0	1.0	0.0	1.0	15.0
		800																						400.0
		total	8.0	13.0	13.0	8.0	12.0	14.0	9.0	12.0	13.0	21.0	31.0	34.0	16.0	23.0	27.0	22.0	33.0	35.0	14.0	19.0	23.0	400.0

Table C.2. Sample Selections - Term

APPENDIX D

TYPICAL QUESTIONS

STAGE IN THE PROCESS	TYPICAL QUESTIONS
Formulate the problem	What is the purpose of the study – to solve the problem? Identify and opportunity?
	Is additional background information necessary?
	What information is needed to make the decision?
	How will the information be used?
	Should research be conducted?
Determine the research design	How much is already known?
	Can a hypothesis be formulated?
	What type of questions need to be answered?
	What type of study will best address the research questions?
Determine data collection method and forms	Can existing data be used to advantage?
	What is to me measured? How?
	What is the source of the data?
	Are there any factors that need to be taken into account in designing the data collection method? What are they?
	Can objective answers be obtained by asking people?
	How should people be questioned?

	Should the questionnaires be administered in person, over the phone or through the mail?
	Should electronic or mechanical means be used to make the observation?
	What specific behaviours should the observers record?
	Should structured or unstructured items be used to collect the data?
	Should the purpose of the study be made know to the respondents?
	Should rating scales be used in the questionnaires?
Design sample and data collection	What is the target population
	Is a sample necessary?
	Is a probability sample desirable?
	How large should the sample be?
	Who will gather the data?
	How long will the data gathering take?
	How much supervision is needed?
	What operational procedures will be followed?
	What method will be used to ensure the quality of the data collected?
Analyse an interpret the data	Who will handle the editing of the data?
	How will the data be coded?
	Will computer or hand tabulation be used?
	What analysis techniques will be used?
Prepare the research report	Who will read the report?
	What is their technical level of sophistication?
	Are managerial recommendations called for?
	What will be the format of the written

	report?
	Is an oral report necessary?
	How should the oral report be structured?

Table D.1. Questions to be addressed at the Various Stages of the Research Process. [Source: Adapted from Churchill (1995: 66)]