

**The Impact of the Sho't Left Tourism Marketing Campaign on
Orlando West Residents**

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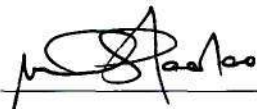
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30 January 2006

Declarations

I declare that this research is my own. It is being submitted for the degree of Masters in Business Administration at the University of KwaZulu-Natal. It has not been submitted for any degree at any other University.

Dated: 17 January 2006



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Abstract

The South African Tourism Board (SATB) is the official tourism authority for South Africa; its mandate includes the domestic and international markets. SATB launched its domestic tourism growth strategy in 2004. The focus of this strategy is to grow the current infant domestic tourism market within South Africa and influence consumers to travel more within the country.

Using the principles of marketing, SATB segmented the domestic tourism market into three segments, namely the established, the emerging and the untapped segments (SATB, 2004). The emerging market has been further segmented into three sub segments namely the young and upcoming, striving families and well off homely couples. The young and upcoming market segment has been chosen for this research.

This study seeks to research the impact of the Sho't Left marketing campaign on the young and up coming consumers. SATB has identified that the young and upcoming reside in Soweto, and other previously disadvantaged regions. Due to time and financial constraints this research has chosen Orlando West, a suburb of Soweto as the target population.

The findings of the research indicated an awareness of the Sho't Left campaign, yet the campaign failed to do more than create awareness. Some respondents were aware of the packages on offer yet only 1.25% of respondents booked the package deals being promoted through the Sho't Left campaign. This research also suggests a lack of the young and up coming segment in Orlando West. The research findings motivate further research into the defined target market segments to ensure that SATB promotions are aimed at the correct targeted segments.

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Dedication

This dissertation is dedicated to my dear beloved wife, Nadine whose unparalleled support and commitment has encouraged me to complete my research paper.

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Abbreviations

“9/11”	11 September 2001 Terror Attacks in the USA
“CEO”	Chief Executive Officer
“DEAT”	Department of Environmental Affairs and Tourism
“EMAB”	England Marketing Advisory Board
“KZN”	KwaZulu-Natal
“PR”	Public Relations
“SA”	South Africa
“SABC”	South African Broadcasting Corporation
“SARS”	Severe Acute Respiratory Syndrome
“SATB”	South African Tourism Board
“Stats SA”	Statistics South Africa
“TV”	Television
“WTO”	World Tourism Organisation

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Chapter One: Introduction to the Research

1.1 Introduction

The Sho't Left campaign was launched in 2004 by the South African Tourism Board (SATB), (SATB, 2004) as part of its domestic tourism strategy. The focus of the campaign is to create affordable travel for specific targeted segments within the South African domestic tourism market. The SATB's aim through the Sho't Left and other marketing campaigns is to create a culture of domestic travel in South Africa, (SATB, 2004).

Using the principals of marketing, SATB segmented the domestic tourism market into three market segments namely, the established, the emerging and the untapped segments. The emerging market was further segmented into three sub segments namely, the young and upcoming, striving families and well off homely couples. The young and upcoming market segment is the focus of this research.

The emerging market showed potential for growth and the Sho't Left campaign was developed to appeal to that segment and in particular to the young, well remunerated black citizens that form a strong core of this segment (SATB, 2004). Sho't Left comprises of deal driven campaigns with tourism trade partners in order to offer affordable packages that will attract the young and upcoming market segment market to travel, (SATB, 2004).

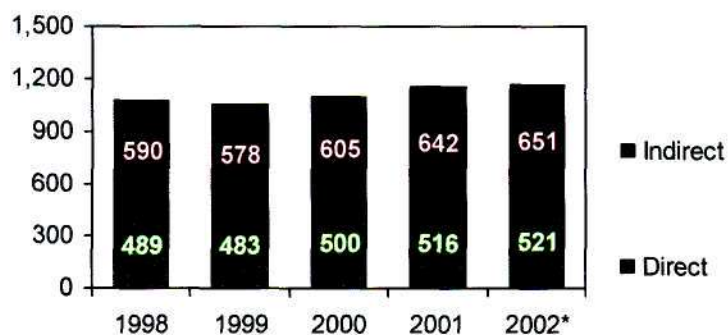
During 2002/3, South Africans undertook more than 49 million domestic trips using various means of transport, (SATB, 2004). According to the SABC news website, www.sabcnews.com, there is vast untapped potential for growth in the domestic tourism industry.

1.2 Background and Context

SATB has focused on the domestic market due to the economic contribution that it could make to the South African economy, (SATB, 2004). The development of the domestic tourism sector will reduce the exposure of the tourism industry to fluctuations in international demand, which is sensitive to political and, economic issues, (SATB, 2004). Support of the local tourism industry by South Africans could result in increased investment in infrastructure, job creation, economic growth amongst other positives for the economy according to Pali Lehohla, (Statistics SA, 2005). South Africa is already employing more people in tourism and tourism related sectors as a result of the industry growth, (SATB, 2004). This in turn fulfils one of the government's aims of reducing unemployment and supporting the economic growth of 6%, (Grady and Rose, 2005).

The graph below shows the growth of employment within the tourism sector in South Africa from 1998 to 2002.

Figure 1.2. Employment as a result of Tourism in South Africa



Source: SATB, 2004

Figure 1.3 Detailed Segmentation of the Sho't Left Campaign

Market Sub Segment	Demographics	Size & Value	Package Fit
Young & Upcoming	Age 18-30 Middle income – R5000 to R10000	5.1 million R3.1 Billion	Fun, vibrant, full of life, exciting & challenging
Striving Families	Age 25 to 45 Middle income R5000 to R10000	0.4 Million R2.0 billion	Relaxing, family fun, friends, memories
Well-off Homely couples	Age 30+ Middle to upper income R10000 to R20000	0.8 Million R2.4 billion	Enriching, inspiring, unique, fulfilment

Source: SATB, 2004

The Table above profiles the emerging market sub segments. This is expressed in terms of their demographics, size and value and package fit.

This research will focus on the young and up coming target market sub segment, as it is that sub segment that SATB's Sho't Left campaign is directed at and being worth R3.1 billion, it is clearly a market that needs to be developed.

So called townships have been identified as the residential areas for the young and up coming segment, (Bashni Muthaya, Research Manager, SATB). Due to the time and resource constraints, Orlando West, a suburb of Soweto was chosen for this research. This research investigates whether the Sho't Left marketing campaign has had an impact on the young and upcoming market sub segment living in Orlando West, as far as persuading them to partake in the Sho't Left promotions.

1.3 Literature Review

The literature review focuses on tourism, marketing and related matters. It describes the South African Tourism Board's Sho't Left marketing campaign. Marketing strategy and marketing concepts such as; branding, market segments, target market, product, pricing, promotion and positioning are discussed.

1.4 Motivation For the Research

The general observation indicates that the Sho't Left campaign has not succeeded in achieving its aims of getting the young and upcoming niche of the emerging segment to travel domestically. SATB has not done any in-depth consumer research on the young and upcoming segment in relation to the Sho't Left campaign. This research intends to carry out in-depth consumer research and to look into whether the perception is correct or not and if so why the campaign has not been a success.

Such information will be of value to SATB in order to make future campaigns more successful as SATB has not carried out any in-depth consumer based research on the Sho't Left campaign in Soweto, (Bashni Muthaya, Research Manager SATB). There has been no pressure on the researcher by SATB, to come up with favourable results.

1.5 Value of Project

This research will aim at determining what impact the Sho't Left campaign has had on tourism among the young and upcoming segment. This study will make recommendations to the SATB to enhance its marketing campaigns in order that they succeed in creating more domestic tourism.

The benefits of this study are to:

- Provide research data which the SATB will be able to use in its marketing of the Sho't Left campaign, to make it more successful. The research findings could contribute to an improved Sho't Left campaign and would help SATB to achieve its aims of promoting domestic tourism
- This study is relevant as it will gain an understanding of the target market and their travel habits and preferences.
- This research will show whether the Sho't Left campaign has created an awareness of affordable travel in the targeted segment. The success of Sho't Left is depended on whether the target segments have made reservations and travelled on any of the packages.
- Identify whether packages are appropriate in terms of what the young and upcoming want and can afford.

1.6 Problem Statement

Based on the researcher's exposure to the tourism industry, a perception developed that the South African Tourism Board's Sho't Left campaign, has not succeeded in getting the young and up coming market segment to travel on its domestic holiday packages.

1.7 Objectives of the Study

- To investigate the effect of the Sho't Left Marketing Campaign on the young and upcoming sub segment in Orlando West.
- To evaluate the awareness that has been created by the Sho't Left domestic marketing campaign employed by the South African Tourism Board.
- To consider the presence of the young and upcoming sub segment of the emerging market in Orlando West.

1.8 The Research Design and Methodology

Qualitative and quantitative analysis of results will be applied in this study. The research methodology will be divided into four stages, which evolved after an initial pre-research phase to get views and opinions on the Sho't Left programme. The pre-research phase consisted of discussions with hoteliers, individuals in the tourism trade and a random sample of members of the public, these discussions resulted in the perception that the Sho't Left campaign had not been a true success. The four research stages will be as follows:

- Primary Research
- Secondary Research
- Data analysis and interpretation
- Presentation of the results of the research

1.9 Limitations of the Project

- The Scope of the research was limited to Orlando West. This is because Orlando West represents the demographic profile of SATB's target market segments for the Sho't left campaign.
- Cost implications of conducting this research on a wider scale were prohibitive.

1.10 Structure of the Study

The report structure follows:

- **Chapter One**

This chapter is an introduction to the research report. It includes the framework of the study and highlights the reasons for the undertaking of this research topic.

- **Chapter Two**

This chapter is a literature review and it focuses on tourism, marketing and related matters. It describes the South African Tourism Board's Sho't Left marketing campaign. Marketing strategy and marketing concepts such as; branding, market segments, target market, product, pricing, promotion and positioning are discussed.

- **Chapter Three**

Chapter Three addresses the research methodology. The research was based on discussions and perceptions which resulted in a questionnaire being formulated and a survey being conducted in Orlando West to evaluate the effectiveness and market penetration of the SATB's Sho't Left campaign.

- **Chapter Four**

In this chapter the survey results are presented and discussed. The data from the questionnaire has been tabulated so that interpretation and analysis may be made.

- **Chapter Five**

Conclusions will be made in this chapter. Recommendations will be made to improve the Sho't Left campaign and the overall domestic tourism marketing strategy. Suggestions for further research in this area of study will also be made.

1.11 Conclusion

The South African Tourism industry contributes greatly to the overall economic well being within South Africa. Therefore SATB has set out a strategy to grow domestic tourism in South Africa by using the marketing campaign called Sho't Left, (SATB, 2004). This marketing campaign will focus on specific segments within South Africa in order create holiday packages that will influence South African to travel locally. The report to be presented will follow the format as expressed in detail in this Chapter. The next chapter, chapter two will contain the literature review.

Chapter 2: Review of Related Literature

2.1 Introduction

The South African economy is currently growing due to an increase in job creation and disposable income according to Pali Lehohla, (Stats SA, 2005). The Finance Minister Trevor Manuel confirmed that, seven reductions in the interest rates over the 22 months through to April 2005 fuelled consumer and business spending, (Seria, 2006). It is the objective of SATB to influence consumers to inject this disposable income into the tourism industry as the South African domestic tourism market has untapped value and potential for growth, (SATB, 2004).

The South African Tourism Industry Empowerment and Transformation Annual Review, (2002) further supported and emphasized that tourism development in South Africa is expected to play an increasingly significant role in contributing to government revenue, foreign exchange earnings, employment creation, entrepreneurship and development due to travel and tourism contributing 3% (R31.1bn) of South Africa's gross domestic product in the preceding year, Tourism Talk (Volume 2, Issue 2, 2002),

In order to capitalise on the economic growth, SATB has launched a domestic tourism growth strategy to grow tourism within South Africa, (SATB, 2004). The Sho't Left campaign is one of the marketing tools used by SATB within the Domestic growth strategy, (SATB, 2004). This is the largest domestic campaign launched by the Department of Environmental Affairs and Tourism, the South African Tourism Board and the country's nine provinces, (www.southafrica.info, 2005). Roshene Singh, Domestic Marketing Portfolio Manager, stated that the focus is to encourage people in the targeted market segment to take short breaks more often.

2.2 Tourism in South Africa

South Africa is a diverse land and has features which make it a great tourist attraction include: accessible wildlife, varied and impressive scenery, unspoiled wilderness areas, diverse cultures, generally sunny and hot climate amongst other attractions, (DEAT, 1996).

Due to the various features and stability of South Africa, the domestic tourism market has grown considerably despite the downturn in global tourism in 2003, after September 11th and the outbreak of severe acute respiratory syndrome (SARS), (SABC News: 10/05/2004).

2.3 Domestic Tourism in South Africa

The following can be described as the motive for the development of the SATB Domestic tourism strategy aimed at the young domestic tourism market in South Africa, (SATB, 2004);

- The domestic market provides significant value to the South African economy. Only a small proportion of the domestic population takes trips for holiday purposes, which is the most valuable form of tourism, (SATB, 2004). In other words the number of South Africans who travel and book into hotels, lodges and tours is low, in comparison to the numbers who spend time visiting friends and family.
- There is untapped value and potential for growth. Opportunity exists to grow the number of domestic trips undertaken, increase the value of the market and combat issues of seasonality, geographic spread and limited trip expenditure, (SATB, 2004).

In 2004 when this domestic strategy was launched, Mr. Chippy Olver the director general of environmental affairs and tourism emphasised that the growth strategy is crucial for building a sustainable tourism industry. He further stated that the strategy focused on the emerging middle class and intended making South Africa a tourism nation. (SABC News:

10/05/04). The growth of the tourism industry will result in economic benefit for South Africa as Mr. Moeketsi Mosola, (CEO SATB), validated that tourism contributes 7 to 8% to the employment of the country, but the tourism department believed that it can reach double figures therefore investing back into the South African economy (SABC News: 10/05/04).

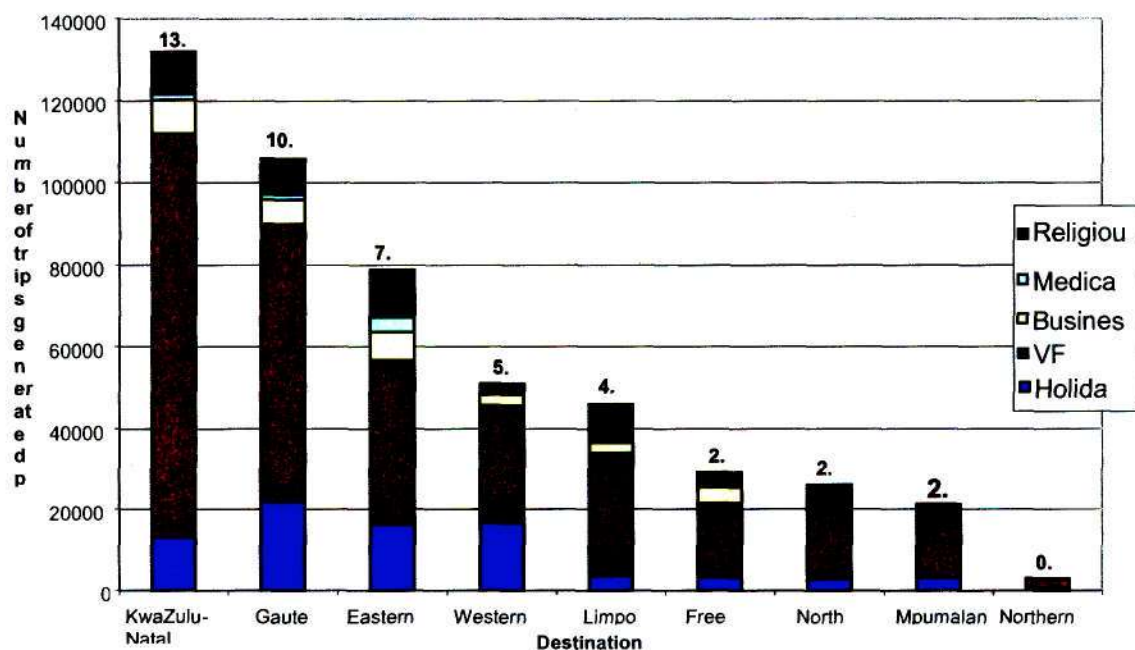
The domestic tourism strategy began its rollout with the Sho't Left Campaign in 2004, (SATB, 2004). This campaign is aimed at the growing potential tourism industry in South Africa and its main goal is to create affordable travel within South African, (SATB, 2004).

The following two graphs show the actual trips taken and domestic share of trips within South Africa and highlights the growing tourism industry, (SATB 2004).

Domestic Trips

KwaZulu-Natal, Gauteng, Eastern Cape and Western Cape generate over 70% of domestic trips undertaken. These trips are defined as the citizens leaving these provinces to travel elsewhere within South Africa.

Figure 2.1 Domestic Trips Taken, 2003

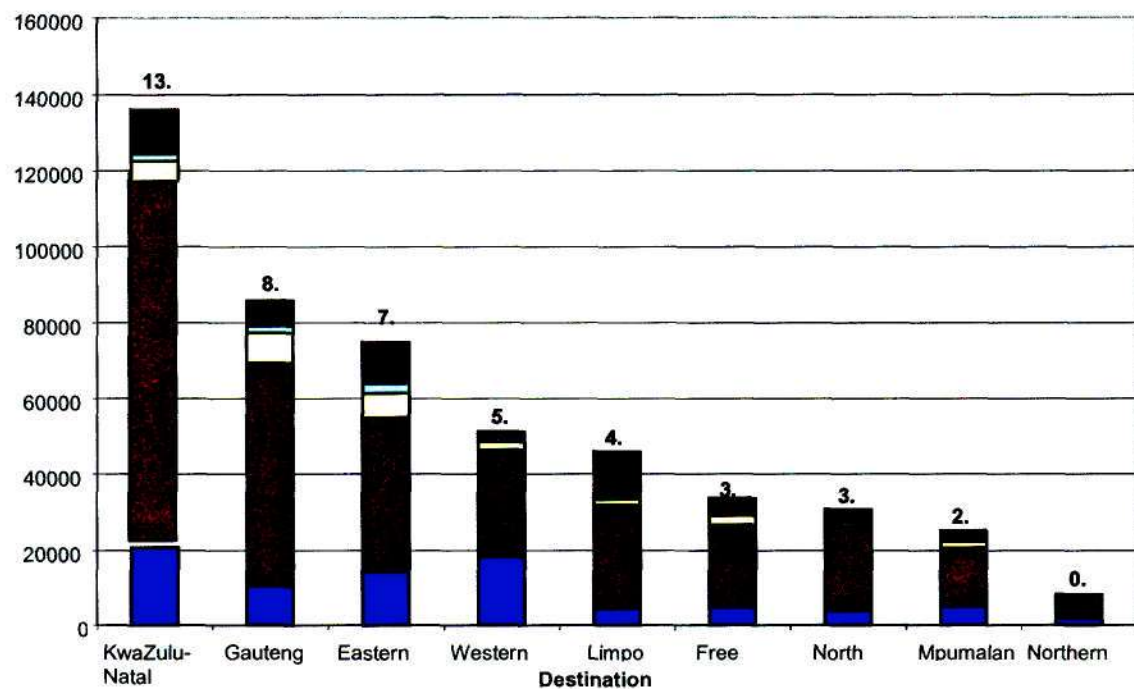


Source: SATB, 2004

Domestic Share of Trips

KZN (28%), Gauteng (17%), Eastern Cape (15%) and Western Cape (10%) dominate domestic market share of trips received. KZN and Gauteng are the top two destinations for South Africans as they receive the bulk of tourists.

Figure 2.2 Domestic Share of Trips, 2003



Source: SATB, 2004

2.4 The Sho't Left Marketing Campaign

The Sho't Left campaign was designed to:

1. Create an awareness of tourism in South Africa and particularly amongst the emergent black young and upcoming segment.
2. Reveal that the doors of travel are open to all citizens.
3. Encourage people to take action i.e. make enquiry or booking. (SATB, 2004).

The Sho't Left campaign was conceptualised in 2004. It targeted the domestic tourism market in South Africa and specifically the sector of the population that traditionally has not been viewed as part of the commercial tourism market. The "Sho't Left" term was taken from Taxi-lingo which means "Drop me off just here." The term was chosen as it alludes to the fact that it is easy to travel, i.e. "it is just around the corner," (SATB, 2004). The strap for the campaign is "Affordable Mzansi (South Africa) Holidays. This is done to clearly position the brand, (SATB, 2004) and thus appeal directly to the target market. This is inline with brand positioning as discussed by Keller, (2003, 119), who quotes Philip Kotler's definition of brand positioning as the "act of designing the company's offer and image so that it occupies a distinct and valued place in the target customer's mind," (Keller, 2003).

In relation to brand consistency, SATB also has a campaign called "Welcome," (www.southafrica.net). This is a domestic campaign that is focused on creating a country of hospitality in relation to tourism, (SATB, 2004) and has been in tourism market from 2002. The Sho't Left campaign is associated with the welcome campaign in regard to the icons and signage. This is used in order to ensure familiarity of the campaign, (SATB, 2004).

Keeping the Brand icons consistent is supported by Keller, 2003 who states that Brand Awareness consists of Brand recognition and brand recall performance. Brand recognition relates to consumer's ability to confirm prior exposure to the brand when given a brand cue. Brand recall relates to the consumers ability to retrieve the brand from memory when given the product category, the needs fulfilled by the category, or a purchase or usage situation as a cue, (Keller, 2003, 67). The welcome man is used to create this brand recognition for the Sho't Left campaign, (SATB, 2004).

Figure 2.3 Welcome Man Icon



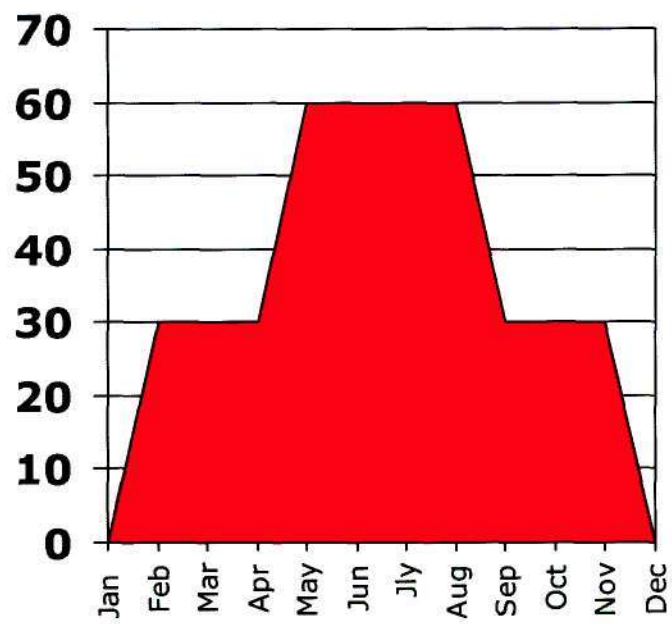
Source: SATB, 2006

SATB strengthen the Sho't Left campaign by re-enforcing the welcome brand to maintain brand consistency. "Brand Consistency is critical to maintaining the strength and favourability of brand associations," (Keller, 2003, 634).

The Campaign is carried out during the following months of the year, i.e.

- February to April
- May to August
- September to November

Figure 2.4 Sho't Left Annual Advertising



Source: SATB, 2004

The Sho't Left campaign used the following ways to stimulate the domestic South African tourism market;

1. Television

- Promotions aired on SABC 2
- The “Sho't Left Chalenj” game show on SABC 2 in 2004
- The “Sho't Left Chalenj” game show to be aired again in 2006 on SABC 2, (SATB, 2004).

2. Advertising and Personal Relations

- Newspaper ads in the relevant city newspapers e.g. The Star in Johannesburg and the Mercury in KwaZulu-Natal
- Taxi Advertising
- Radio
- Cinema
- Billboards
- Interviews
- Articles
- Media Events, (SATB, 2004)

3. Outreach

- Road show to large employers
- Events
- Expos
- Shopping Centres, (SATB, 2004)

Figure 2.5 Example of the Print Advertising



Source: SATB, 2004

2.5 Marketing Strategy

The fundamentals of marketing strategy, as discussed below, have been considered in the formulation of the SATB's domestic tourism growth strategy, (SATB, 2004).

2.5.1 Definition of Strategy

Hitt, Ireland and Hoskisson (2003, 112) define strategy as an integrated and coordinated set of commitments and actions designed to exploit core competencies and gain a competitive advantage.

2.5.2 Definition of Strategic Marketing

Strategic marketing is a market-driven process of strategy development that takes into account the ever changing marketing environment. Strategic marketing links the organisation with the environment and views marketing as the responsibility of the business rather than a specialised function, (Arbee and Naidu, 2001, 14).

Lynch (2000) outlines three generic competitive strategies as follows:

Three generic competitive strategies;

1. Cost Leadership

The firm seeks a cost advantage in its target segment only

2. Differentiation

A firm seeks differentiation in its target market.

3. Focus

Is the exploitation of a narrow target's differences from the balance of the industry, (Lynch, 2000, 564)

a) Market Segmentation

George, (2004, 125) has defined the tourism market segmentation as the way in which tourism companies divide a market into smaller more clearly defined groups that share similar needs wants and characteristics.

b) Demographic Segmentation

It is essentially the study of a population of people. Demographic segmentation consists of dividing the market into groups based on gender, income, age and family life cycle stage, occupation and education, (George, 2004, 127).

The advantages of segmentation are:

- Allows marketers to focus on consumer needs and wants;
- Helps marketers to develop an effective marketing mix
- Enables more effective market positioning, (George, 2004, 135).

George (2004), states that many tourism organisations provide different offerings and use different marketing strategies to target various age and family life cycle segments,” (George, 2004, 128).

c) Positioning

Consumers are attracted to distinctive benefits of a particular product and therefore positioning of a product is vital to ensure these attributes are communicated, (Arbee and Naidu, 2001, 108).

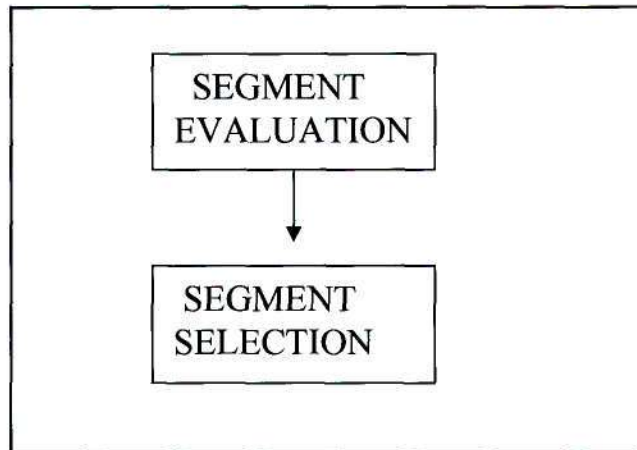
Positioning can be broken down into four basic tasks referred to as the four Ds of effective positioning:

1. define the brand as a member of some product category
2. differentiate the brand from other category members in a way that is clear and meaningful to target consumer's goals
3. deepen consumers understanding of the brand's benefit and of the relation of these benefits to consumer's goals
4. defend the brand's position over time as competitors react and consumer tastes change, (Arbee and Naidu, 2001, 108).

d) Targeting

“A target market represents a fairly homogenous group of customers to whom a firm wishes to appeal. Deciding which segment(s) to appeal to (i.e. to target) comprises of two activities, reflected in the figure below;”

Figure 2.6 Segment Evaluation and Selection



Source: Arbee and Naidu, 2001, P108

Segment evaluation: Several criteria are used to assess the identified segments. The relative attractiveness of segments must be considered, as must the “fit” of the segments with the objectives and resources of the firm, (Arbee and Naidu, 2001, 105).

Segment selection: Once the segments have been evaluated they are ranked, and those to which marketing resources will be applied are selected, (Arbee and Naidu, 2001, 105).

e) The Marketing Mix

i) Definition

“The controllable variables the company puts together to satisfy the target group,” (Perreault and Mccarthy, 2002, P46).

ii) Product

The product is concerned with “developing the right product for the target market,” (Perreault and Mccarthy, 2002, 48). Perrault and Mccarthy also state that the goods or service should satisfy the customers’ needs. It is necessary to build brand loyalty among consumers to achieve brand preference and ultimately brand insistence if possible,

(Bhowan et al., 2001, 11). The more a consumer “experiences” the brand by seeing it, hearing it, or thinking about it, the more likely it is that the brand will become strongly registered in memory, (Keller, 2003, 69). Keller further states that “through the skilful design and implementation of marketing programs that capitalize on a well-conceived brand positioning, strong brand leadership positions can be obtained, (Keller, 2003, 48).

iii) Price

“Price sells products and services,” (Bhowan et al., 2001, 31). Bhowan et al, further states that organisations would have to decide what price to follow and assess how customers perceive their products/quality relationship. Kotler defines nine price-quality strategies, (Bhowan et al., 2001, 32). These strategies are detailed below;

2.1 Kotler’s Nine Price-Quality Strategy

		PRICE		
		High	Medium	Low
Q U A L I T Y	High	Premium Pricing Strategy	High Value Pricing Strategy	Value for Money Strategy
	Medium	Over-charging Pricing Strategy	Medium-value Pricing Strategy	Affordable Pricing Strategy
	Low	Rip-off Strategy	False economy Strategy	Low-Cost Pricing Strategy

Source: Bhowan, et al., 2001, P32

iv) Promotion

This is concerned with telling the target market or others in the channel of the distribution about the right products and includes personal selling, mass selling, and sales promotion, (Perreault and McCarthy, 2002, 50). The AIDA model can be utilised to ensure an effective marketing strategy. AIDA is an acronym for Attention, Interest, Desire and Action. (Bhowan, et al., 2001, 101). This model assumes that advertising effects always follow the cognitive (knowledge), affective (emotion) and behaviour sequence, (Bhowan, et al., 2001, 104). Alternatively the DAGMAR (defining advertising goals for measured advertising results) model can be used and differs from the AIDA model in that it provides advertisers with a platform to design adverts and create awareness of products of specific brands, (Bhowan, et al., 2001, 104).

v) Place

This concerns getting the “right” product to the target market at the right time (Perreault and McCarthy, 2002, 48). Bhowan et al., distinguishes 3 categories of distribution being, Exclusive, Selective and Intensive. Exclusive is when an organisation limits the number of intermediaries it utilises in a geographic area, selective distribution is when the organisation employs a moderate number of intermediaries to distribute its products and the objective of the intense is widespread market coverage, channel acceptance, high sales and profit, (Bhowan, et al., 2001, 71).

2.6 South African Tourism Board's Domestic Growth Strategy

The Sho't Left marketing campaign is the marketing tool of the SATB's domestic tourism growth strategy. The SATB developed its growth strategy over a period of time and has identified the following areas as important facets of the strategy, (SATB, 2004).

- **Greater Promotion of the Domestic Tourism Brand**
SA Tourism's domestic brands will be seen and heard more than ever before. The objective is to create a holiday culture amongst all South Africans and to make travel "sexy" and thus attractive to citizens, (SATB, 2004).
- **Promote a set of experiences that relate to South African consumers**
It's possible to travel and holiday, the doors of travel are open to all. The focus being on the following seven reasons to take a holiday: City Breaks, Coastal Getaways, Mountain Escapes, Cultural Discoveries, Countryside Meanders, Bush Retreats and Event Wonders. These experiences can be tailored for each target segment, (SATB, 2004).
- **Distribute appropriate information in specific places**
Information (motivational decision-making, destination) and Education around domestic tourism and tourism products and experiences to be more widely available through traditional and non-traditional media, (SATB, 2004).
- **Facilitate the development of co-operative product packages**
Working at National and Provincial level to facilitate linkages and product packaging which will convert interest into action, (SATB, 2004).
- **Develop marketing and distribution channels**
Greater marketing of products to consumers to ensure conversion and purchase in a relevant and cost-effective manner, through traditional and non-traditional media e.g. Stokvels (Co-operative savings clubs), (SATB, 2004).

- Promote repeat visits

Customer relationship management and loyalty or reward programs for frequent domestic travelers are to be facilitated to encourage repeat visitations by the consumer to engage with a variety of travel experiences, (SATB, 2004).

2.7 Selected Domestic Tourism Growth Strategies

SATB has followed the global trend towards investing into the potential domestic tourism market. The Australian and England domestic tourism strategies are discussed to better understand the SATB's current domestic growth Strategy.

2.7.1 Australian Domestic Tourism Strategy

a) Domestic Tourism

The New South Wales parliament published the domestic tourism accounts for 75% of tourist activity in Australia on their website. (<http://www.parliament.nsw.gov.au>). The statistics for nights stayed away by Australians, while travelling within Australia, are as follows:

Date: 05 January 2006	Source: Standard bank
Exchange Rate Conversion	1 Rand = .2230 AUD

Source: www.standardbank.co.za

Australians' Nights Spent Away, While Traveling Within Australia: 1998-2002

Table 2.2 Australian's Night Spent Away, While Travelling within Australia, 1998-2002

1998	\$293.5 million	R1291.40 million
1999	\$294.2 million	R1294.48 million
2000	\$293.4 million	R1290.96 million
2001	\$289.6 million	R1274.24 million
2002	\$298.6 million	R1313.84 million

Source: <http://www.parliament.nsw.gov.au>, 2004

b) The Prospects for Domestic Tourism

Domestic tourism, as noted above, is the foundation of the Australian tourist industry. Australia debated between two strategies for the basis of promoting tourism within Australia (<http://www.parliament.nsw.gov.au>), i.e.

- Culture-Based, and (Authentic) Experience-Based, Australian Tourism
 - Events-Based, and Theme Park-Based Tourism
- (<http://www.parliament.nsw.gov.au>).

The South African Tourism Board's Growth Strategy (2004) published the following in relation to the Australian Tourism Market:

- Total value of domestic tourism in 2002: AUS\$39.9 billion (R199.5 billion)
- Total number of domestic overnight visits in 2002: 75.3 million
- High level of holiday travel at 42 per cent of all visits and comprising 52 per cent of total value.

Domestic marketing partnership comprises Tourism Task Force, AAA Tourism, State Tourism Authorities, Australian Tourism Commission working together to develop "See Australia" campaign, (SATB, 2004). South africa will also follow the experience

strategy by promoting a set of experiences that relate to South African consumers, (SATB, 2004)

2.7.2 England's Domestic Tourism Growth Strategy

The England Domestic Tourism Growth Strategy has been developed by VisitBritain with the guidance of the England Marketing Advisory Board (EMAB) and also with formal consultation with both private and public stake holders around the central vision called: Enjoy England, (British Tourist Authority, 2003). England has defined six strategies to form the foundation of their domestic tourism strategy, i.e.

- **Insights – understanding market potential**

VisitBritain has taken the initiative to improve knowledge of consumer attitudes, motivations and barriers to taking a trip in England, whether for leisure or business purposes. This is done in order to realise their aspirations for the domestic market, (British Tourist Authority, 2003).

- **The exchange of market intelligence**

VisitBritain sees the need to optimize their resources between private and public stakeholders in relation to marketing tools, collateral and skills, (British Tourist Authority, 2003).

- **Consumer segmentation system**

In parallel with the preparation of the Strategy, VisitBritain has begun the development of a consumer segmentation system based on beliefs and values, (British Tourist Authority, 2003).

➤ Setting the scene

VisitBritain's mission is to build the value of tourism by creating world class destination brands and marketing campaigns, (British Tourist Authority, 2003).

➤ England Marketing Advisory Board (EMAB)

VisitBritain has been given by the Secretary of State for Culture, Media and Sport the remit to 'lead and co-ordinate domestic tourism marketing in England', (British Tourist Authority, 2003).

➤ The Vision

To provide focus to the England Domestic Marketing Strategy 2003/4 - 2005/6 ("the Strategy"), EMAB has developed the following vision statement for VisitBritain's domestic tourism marketing activity;

- Enjoy England. This vision statement builds on one of the primary objectives set for VisitBritain when it was first established by the Secretary of State for Culture, Media and Sport:
- To grow the value of the domestic market by encouraging the British to spend more on tourism throughout the English regions throughout the year, (British Tourist Authority, 2003).

The South African Tourism Board has followed the same ideals of strategy formulation that England and Australia have implemented. These include segmentation of the target market and "experience" based tourism packages e.g. coastal getaway, (SATB, 2004).

2.8 Conclusion

This chapter has covered aspects like the shot left campaign, tourism, marketing and other relevant disciplines. SATB has a detailed strategy to implement in order to grow domestic tourism in South Africa, (SATB, 2004). The Sho't Left promotion is the first concerted media campaign created to enhance the growth of domestic tourism amongst emerging tourists, which are those segments of South African society which do not have a history of travel, (DEAT annual report, 2004/2005). This campaign is aimed at stimulating the domestic market to take more short breaks more often, (SATB, 2005).

Australia and England have defined domestic strategies for their respective countries. South Africa has followed their lead to ensure that the country's domestic tourism market is developed, expanded and optimised. By doing this, SATB has segmented the market and has put together packages, i.e. Sho't Left is aimed at these target markets in order to attract them to go on holiday, (SATB, 2004). These packages cover a range of specials targeted at the segments defined, (Sho't Left Brochure, 2005). The impact of this strategy on tourists will be measured in a survey undertaken in Orlando West and will be covered in the following chapter.

Chapter Three: Research Methodology

3.1 Introduction

It was believed that this research would yield insights into the Sho't Left campaign by venturing into an area where market opinion in this field has not been tested previously.

The survey method was chosen as the research strategy. This involved creating a questionnaire, selecting a sample and analysing the results using a computer aided package. This study was cross sectional as it is defined by a time constraint.

3.2 Aims of the study

The aim of the research was to clearly understand the impact of the Sho't Left marketing campaign on the young and upcoming market segment in Orlando West by:

- Evaluating the Sho't Left marketing campaign with regard to creating awareness of the campaign and products offered
- This research considering the Sho't Left campaign's ability to motivate consumers to travel within South Africa
- Testing the effectiveness of the Sho't Left campaign on target market in Orlando West.

3.3. Conducting the Research

3.3.1 Target Population

Orlando West was chosen as it is the residence of the young and upcoming target market as defined by SATB, making it a good sample. The target population statistics were retrieved from Statistics SA, based on the 2001 Census conducted within the Orlando West area of Soweto.

Table3.1 Statistics for Persons Aged Between 15-30 Years.

Statistics South Africa 2001 Table 1 Sex For persons weighted, 15-35, Orlando West		
Male	Female	Total
8073	7753	15826

Source: Statistics SA, 2005

3.3.2 Sample Selection

According to Krejcie and Morgan, 1970, the sample size is determined as follows:

Population	Sample Required
15 000	375
20 000	377

Source: Krejcie and Morgan, (1970)

According to Statistics South Africa (2005), the population of Orlando West that is between the ages of 15 and 30 is 15 826. Therefore the target sample size for the Sho't Left research was set at 400, which was adequate for this study.

Question 1 to Question 9 of Part B of the questionnaire focused specifically on the Sho't Left campaign. The positive response to question one was 144 and this was used as a sample group for Question 2 to Question 9 as these individuals were familiar with the Sho't Left campaign. Questions 8 to 18 took into account all respondents as this part was focused on gathering travel information on the target market as defined by SATB. This information was used to consider the Sho't left strategy offerings in relation to the target market and to review the objectives of the study.

3.3.3 Research Instrument

The research was conducted through the use of a formal questionnaire, which comprised of two Sections. Part A focused on the demographics of the respondent and Part B entailed the detailed questions relating to the Sho't Left campaign and travel preferences of the respondents in Orlando West.

The collection of data comprised of both qualitative and quantitative data. The quantitative approach involved the use of a structured questionnaire to highlight the following areas:

- The Sho't Left marketing campaign- This involved the total number of people that knew about the marketing campaign and the associated packages.
- The travel preferences/habits of the target market-This involved the consumer's decision making process as it detailed the preferences when making a travel decision.

- The target market- This area aimed to evaluate the presence of the target market as expressed by the Sho't Left marketing campaign.

The qualitative approach involved the use of an unstructured interview. The questionnaire was completed by 19 field workers based on the answers provided by the respondents. In conducting the interview, the field worker was required to ask the questions in the language of the respondent (whenever possible). Since qualitative research is concerned with the opinions, experiences and feelings of individuals, producing subjective data, the aim of the interview was to discuss a limited number of questions about the Sho't left campaign and the travel preferences of consumers. The questionnaire is attached in appendix I.

3.3.4 Questionnaire Content

Part A is the demographic section of the questionnaire and it consists of eight questions. These questions were used to further understand the sample group in particular their age and area of residency.

Part B is made up of eighteen questions. Fourteen questions required the respondents to make a choice from the list. Four questions were open ended and respondents were asked their opinions/views on the subject.

The questions were aimed at gathering information from respondents in relation to the Sho't Left campaign. These questions were to identify the number of people who have heard about the Sho't Left promotion. The first eight questions were aimed at gathering information about the Sho't Left promotion. The next ten questions focused on tourism and related to the travel habits of the respondents. This was used in order to gather further information in order to enhance the Sho't Left promotion. These ten questions were structured around the current Sho't Left promotion offerings in relation to holiday packages.

Example: Question Eight was posed in relation to the travel destination choice (province) of the respondents. These answers will be measured against the current destinations offered within the Sho't Left packages. The results will illustrate if the current packages contain the demand destinations as stated by the respondents

3.3.5 Research Duration

The study was conducted in two phases:

- The first phase was completed on the 26th of November collecting a sample of 100
- The second phase was carried out from the 20th to the 22nd of December collecting a sample of 300.

3.3.6 Research Team

The research was conducted by Brand Forensic, a market research company. All the team members have experience in conducting personal interviews and surveys. Mr Kheta Mazibuko, the research project Manager was briefed on the research approach and requirements. He in turn briefed the team members. Reasons for using a professional team were:

- Intimate knowledge of the target market, Orlando, Soweto.
- Using the team was more efficient and consumed less time that would have been the case had a team been assembled from scratch, trained and supervised.
- Logistically it would have been problematic to fetch and transport a team of fieldworkers.

3.3.7 Fieldwork

The questionnaire was reviewed by various people and finally by the portfolio manager of the South African Tourism Board, Mr. Tumaini Leshoi, the manager responsible for the Sho't Left campaign. He was satisfied that it would adequately evaluate the Sho't Left campaign. The field workers were asked to choose respondents that fell into young and upcoming target segment.

Open and closed questions were used to gain more insight into the Sho't Left campaign. A further quick discussion was facilitated in order to obtain further information on suggestions and recommendations from respondents. Fieldworkers ensured that the discussions were informal and this allowed the respondents to express their recommendations and concerns about the Shot' Left campaign and also about domestic tourism in South Africa. This is detailed in the following chapters.

3.3.8 Reliability of the Survey Instrument

The reliability of the questionnaire refers to the ability of the tests to reveal consistent results.

The Asia Market Research terminology index, states that "apart from it's intuitive meaning, theoretical reliability refers to the extent that a measure of a concept, whether it be a product attribute or a concept such as ad recall or brand recognition, would deliver the exact same results no matter how many times it is was applied to random members of the same target group, (www.asiamarketresearch.com, 2006).

In the academic setting, reliability estimates of a question or set of questions that together are positioned to be a measure of a certain concept can take several forms including test-retest and split-half reliability testing. Reliability can be differentiated from validity which measures the extent to which the research is really measuring what it says it is." (www.asiamarketresearch.com, 2006).

The Red River College published the following in relation to the Test-Retest Reliability Method on their extranet;

- With test-retest reliability a test developer gives the same test to the same group of test takers on 2 different occasions.
- Scores on the 1st administration are compared to scores on the 2nd administration using correlation (r).
- This method examines performance over time and gives an estimate of stability.
- Often researchers consider test-retest reliability to be a better measure of temporal stability, which refers to consistency of test scores, rather than true reliability, which is defined as the ratio of true to observed variance.
- The interval between the administration of the 2 tests can be either a few hours or several years, (www.xnet.rrc.mb.ca, 2006)

The test- retest reliability method is discussed above as this was used to measure the integrity of the data. Prior to the survey, the questionnaire was tested on colleagues and family to ensure a complete understanding of the questionnaire by respondents. The test can be deemed reliable as all research assistants have had previous experience in conducting research and have an understanding of what market research entails.

3.3.9 Validity of the Survey Instrument

The Asia Market Research terminology index, on their website, records the definition of validity as “the extent to which a question or scale is measuring the concept, attribute or property it says it is. In practice, validity can also refer to the success of the project in retrieving "valid" results.”

To measure validity of the Sho't Left research, the scores on one dimension of the initial survey were correlated against the scores on that domain during the second survey (Content Validity). The correlation coefficient was derived which indicated that the test instrument was suitable, (DeFusco, et al., 2004, 380).

3.4 Conclusion

The target market focused on the young and upcoming market segment who did not have a history of travel in the sense of being tourists, this segment was selected as this is the chosen target market of SATB, (SATB,2004). The questionnaire was formulated to allow the respondents to give an accurate account of their perception of the Sho't Left campaign. The questions were detailed with multiple choice answers to ensure that specific components of the campaign were researched, e.g. awareness and affordability. The research was undertaken by fieldworkers who understand the concepts of marketing research and were able to facilitate the completion of the questionnaires. The information was captured electronically and the results are in line with proving the objectives of the research.

The above methodology was followed to conduct the research of the impact of the Sho't Left campaign on Tourism in Orlando West. The results have been tabulated and tested and are presented in the next chapter, chapter four.

Chapter Four: Presentation of Research Results

4.1. Introduction

This chapter presents the results of the research. The details have been graphically illustrated based on the questionnaire.

A percentage of potential respondents did not complete all questions and further to this the respondents did not answer all questions due to various reasons, some of which being that they were in a hurry, others did not wish to answer all the questions. In spite of this a large number of responses were obtained. The research was conducted with the approval of respondents.

4.2 Qualitative Survey Results

A sample of 400 respondents was selected to complete the questionnaire using interviews. The field worker facilitated the completion of the questions by recording the comments according to the respondent's answers.

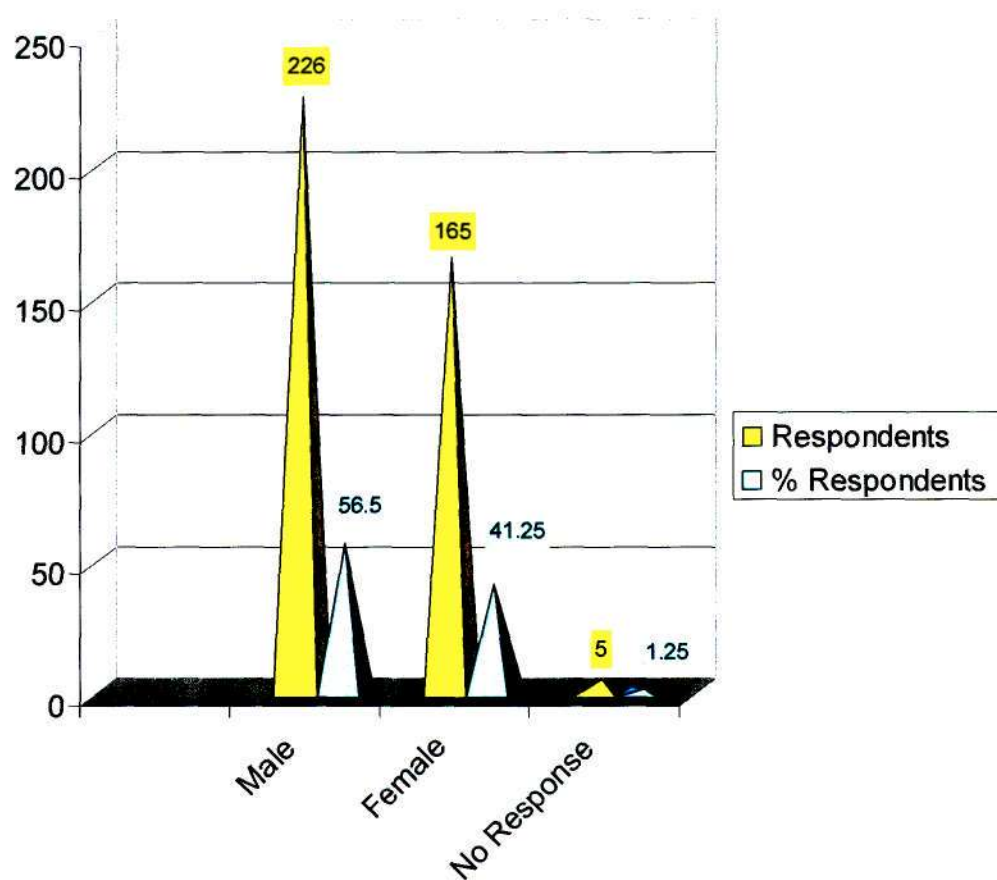
144 respondents were used as a sample group for the first nine questions, as these respondents confirmed that they were aware about the Sho't Left campaign. The balance of the questions was directed at the 400 respondents.

4.3 Descriptive Statistics from the Survey Results

4.3.1 PART A: Demographics

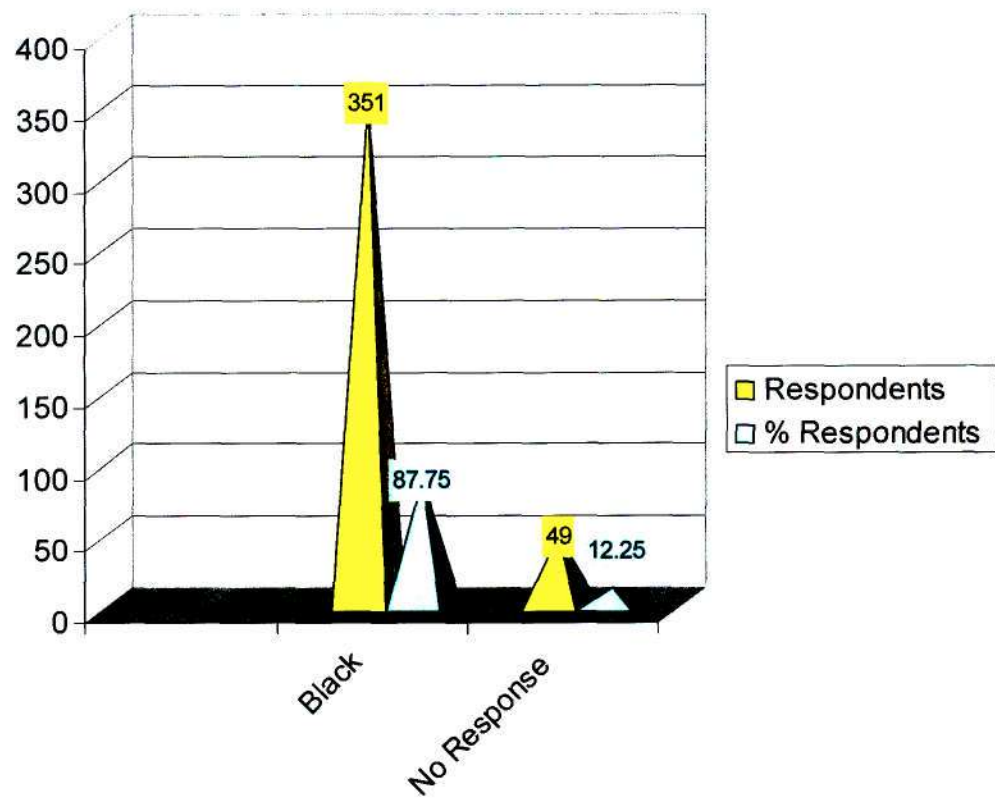
Question One

Gender



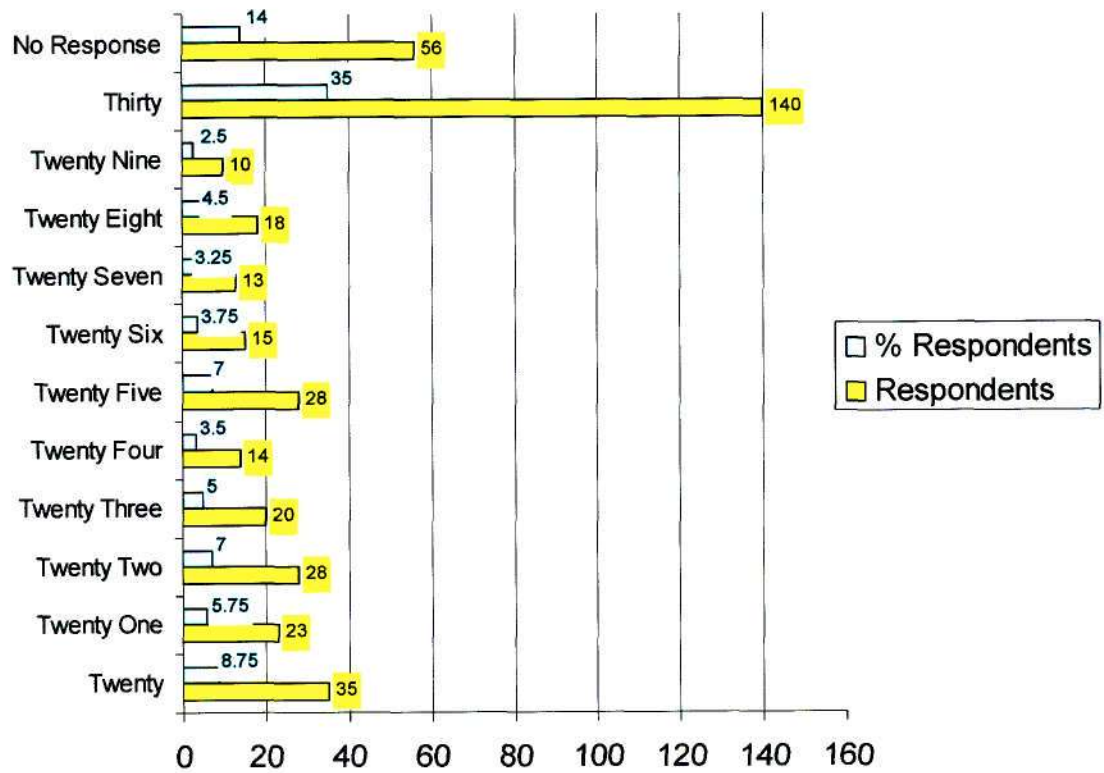
Question Two

Ethnic Group



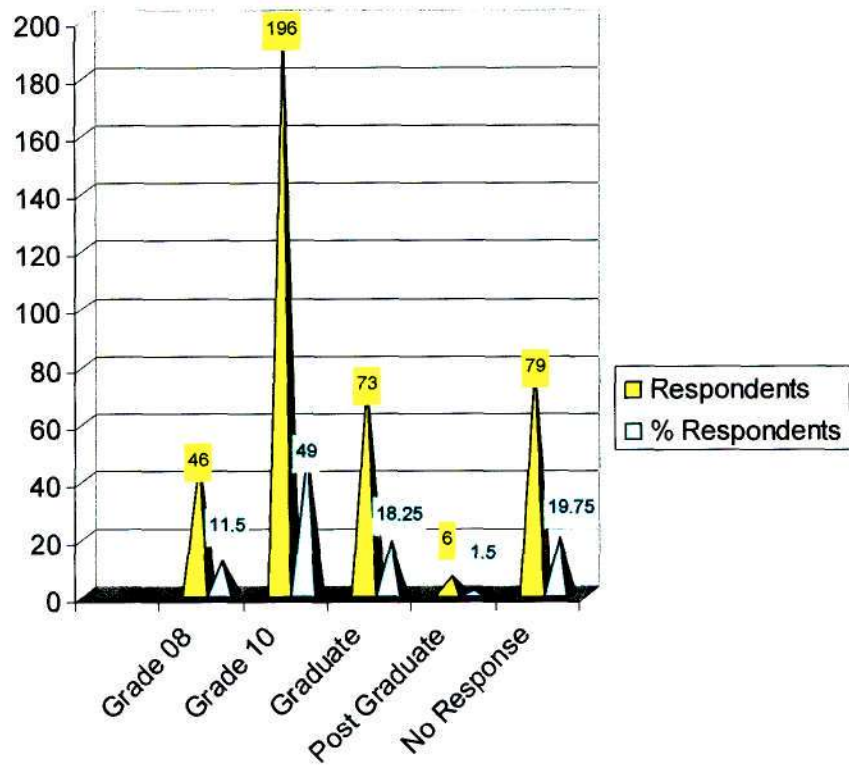
Question Three

Age



Question Four

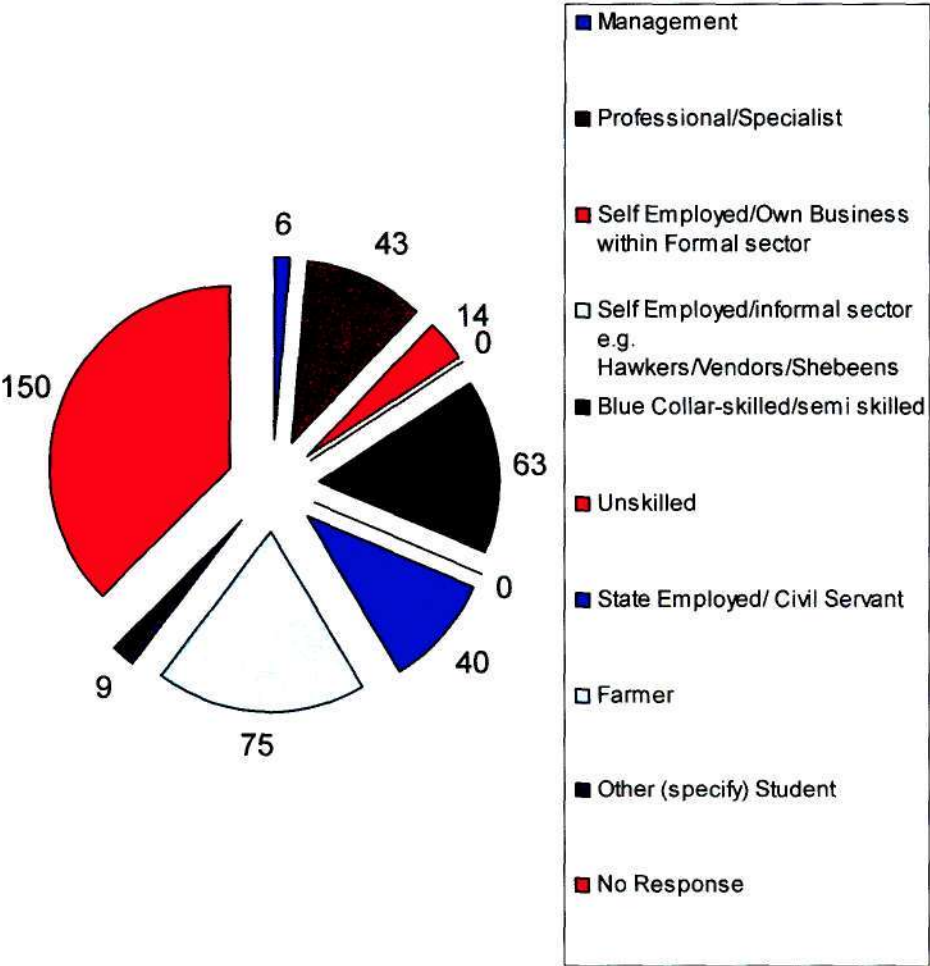
Level of Education



Question Five

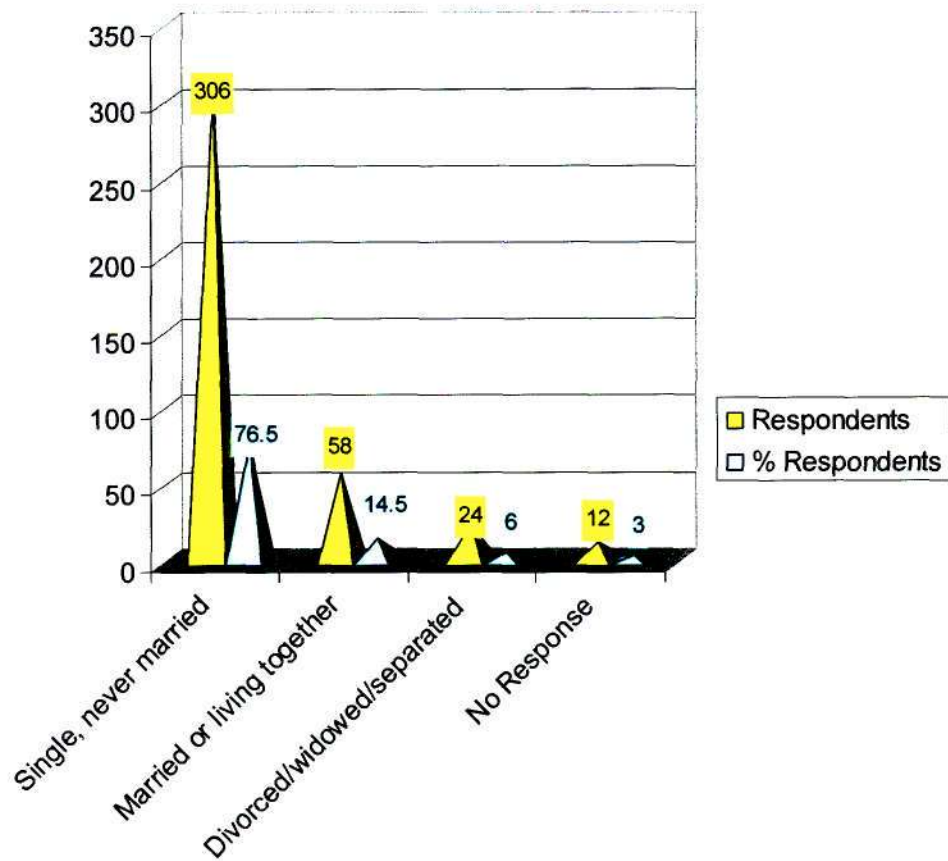
Occupation

Respondents



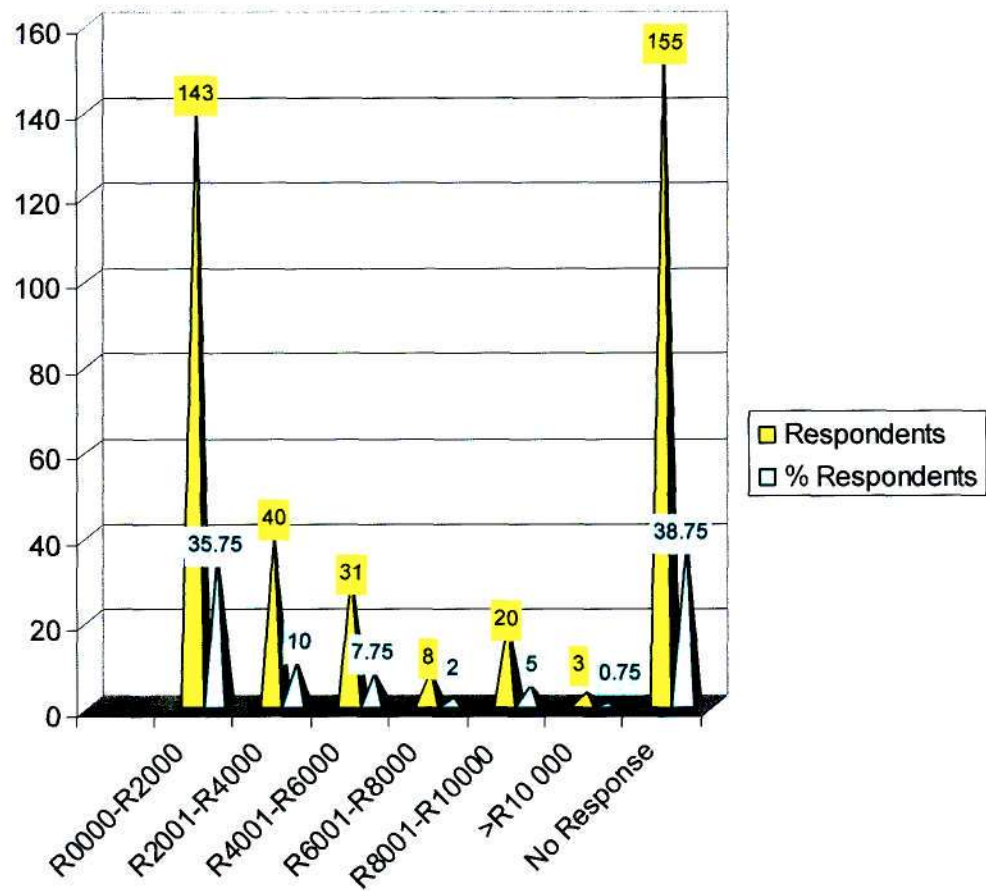
Question Six

Marital Status



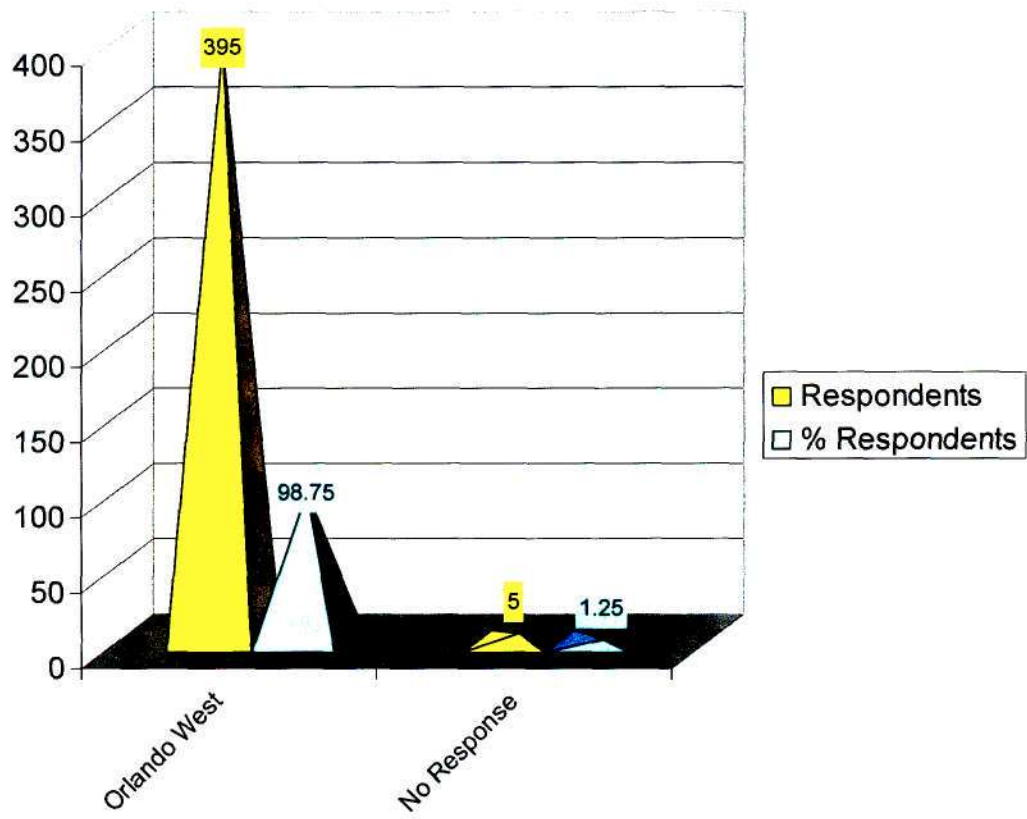
Question Seven

Monthly Income



Question Eight

Residency

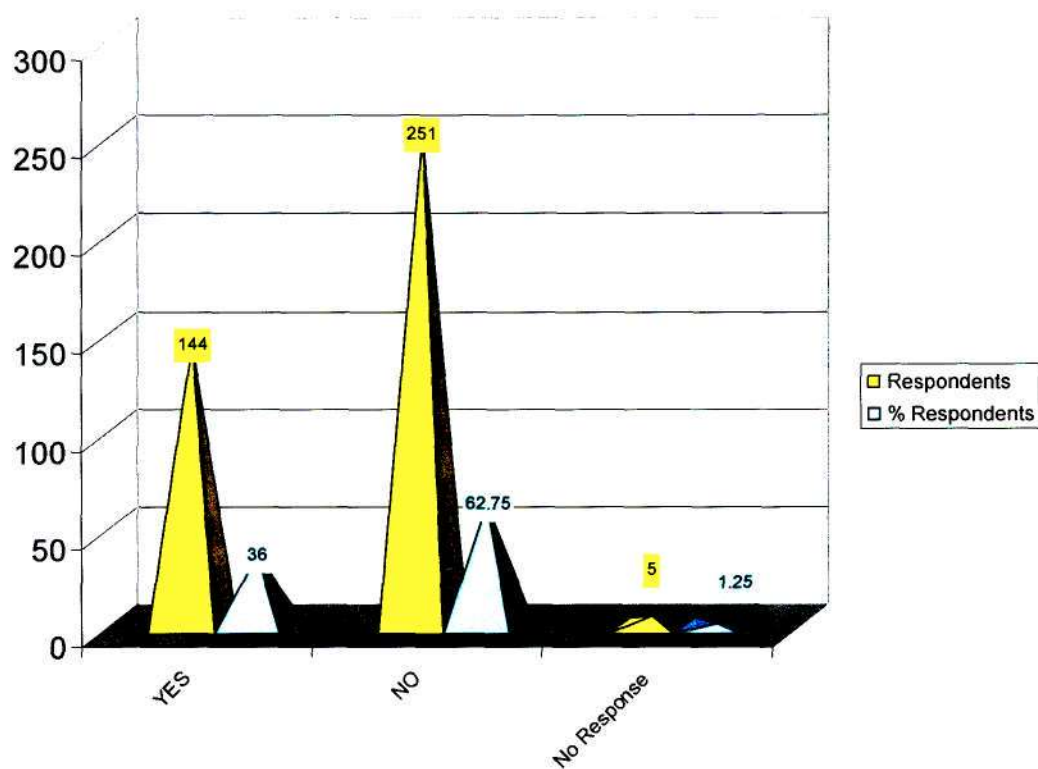


4.3.2 PART B: Detailed Questions

a) Close Ended Questions

Question One

Are you aware of the Sho't Left Promotion?

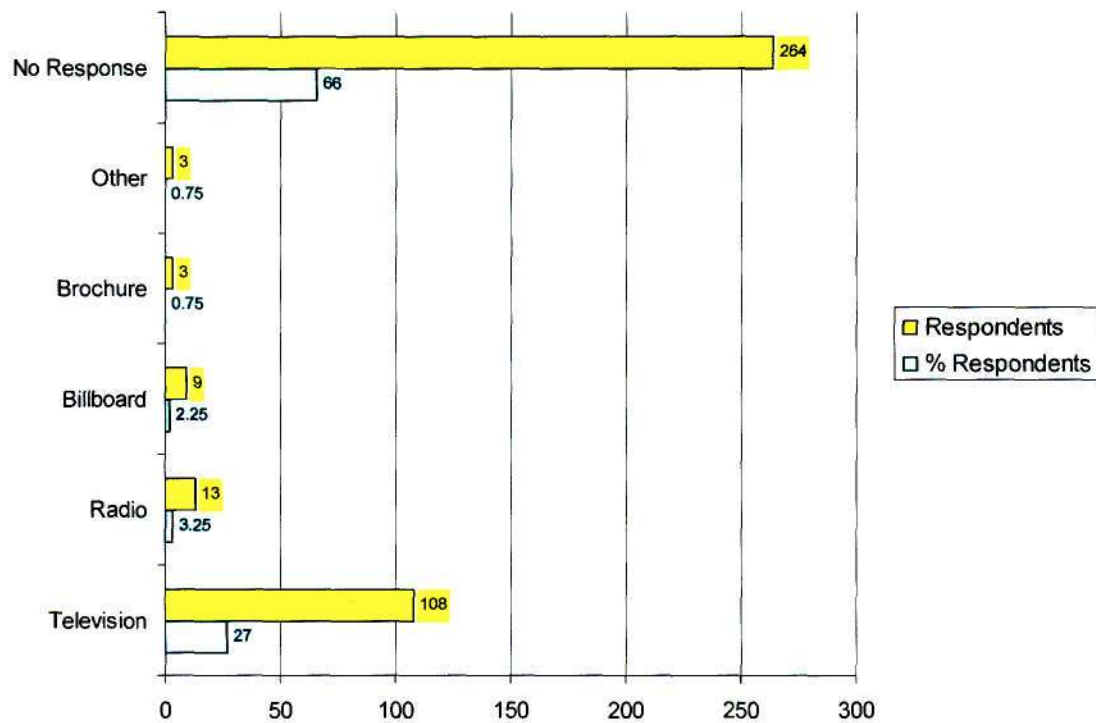


36% of the respondents knew what the Sho't Left promotion was. 62.75% had not been aware of the campaign. Many respondents were unaware of the Sho't Left campaign and this does reflect negatively on the awareness drive by the South African Tourism Board's domestic marketing division.

Only 144 respondents confirmed their knowledge of the Sho't Left Marketing Campaign. Therefore Question Two to Question Nine were directed only to the sample size of 144 and therefore a large amount of no responses were recorded within this set of questions.

Question Two

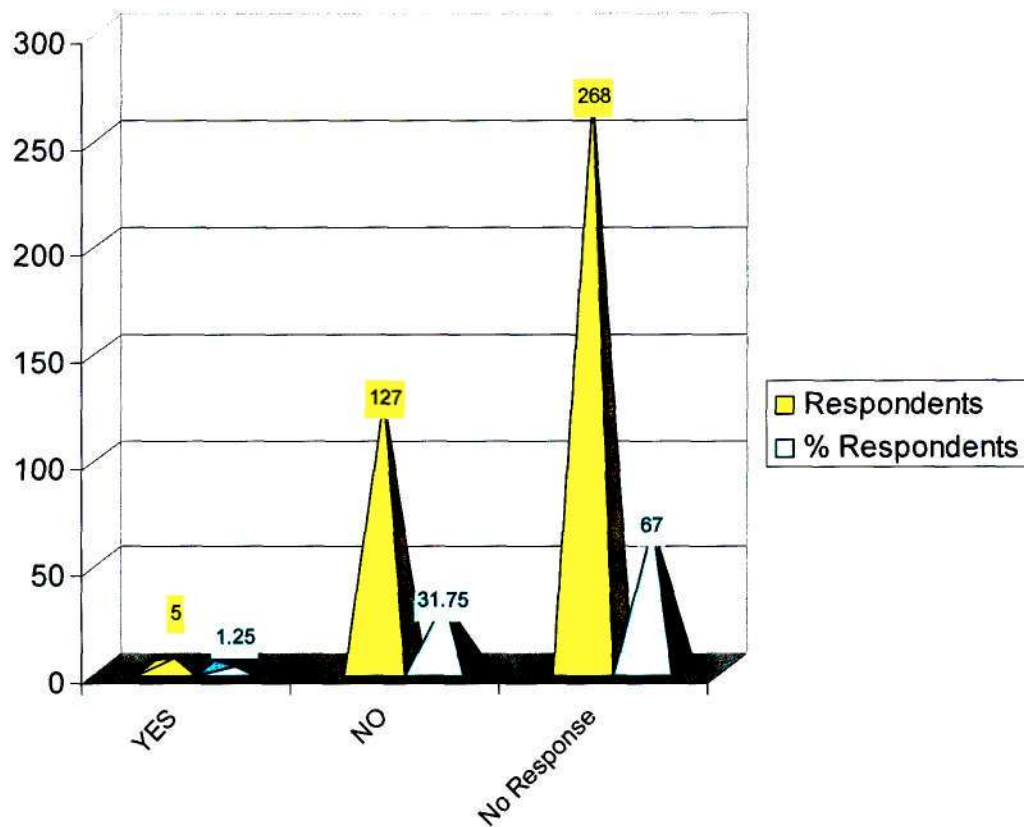
How did you hear about the Sho't Left Promotion?



As identified above, the main source of advertising is television in relation to the Sho't Left campaign, leading by 27% of the total respondents. Radio is second highest with 3.25% of the total respondents.

Question Three

Have you taken a holiday on one of the Sho't Left promotions?

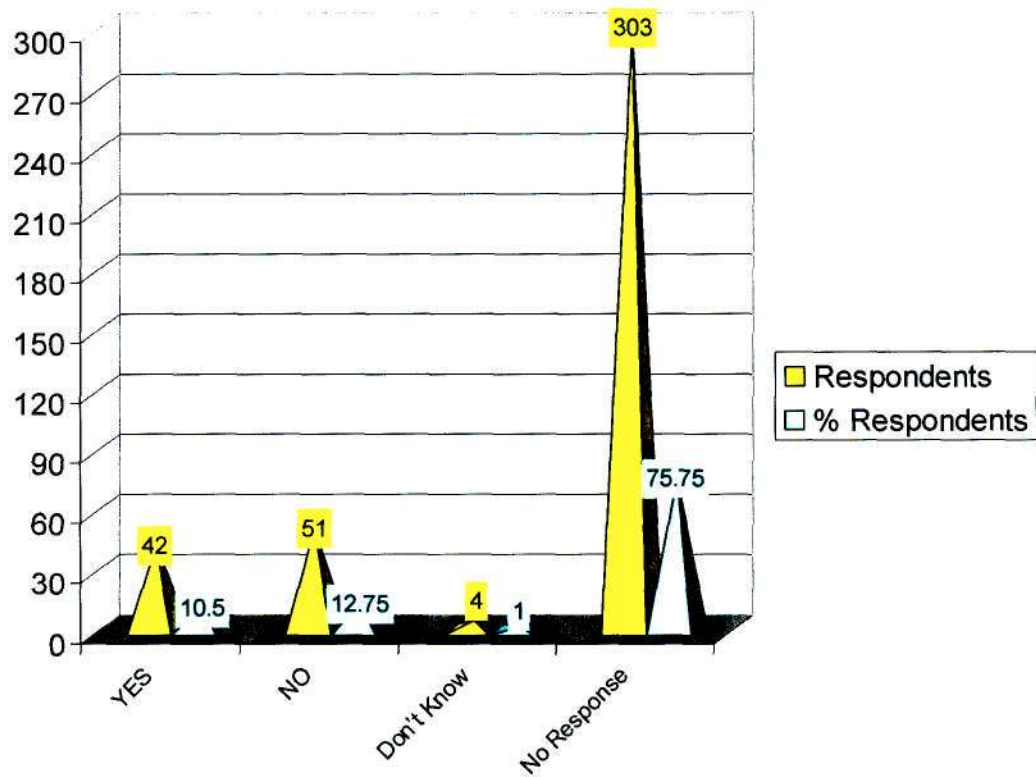


31.75% of the total respondents did not take a holiday trip on the Sho't Left campaign.

Only 1.25% of the respondents had taken a holiday on the Sho't Left Promotion.

Question Four

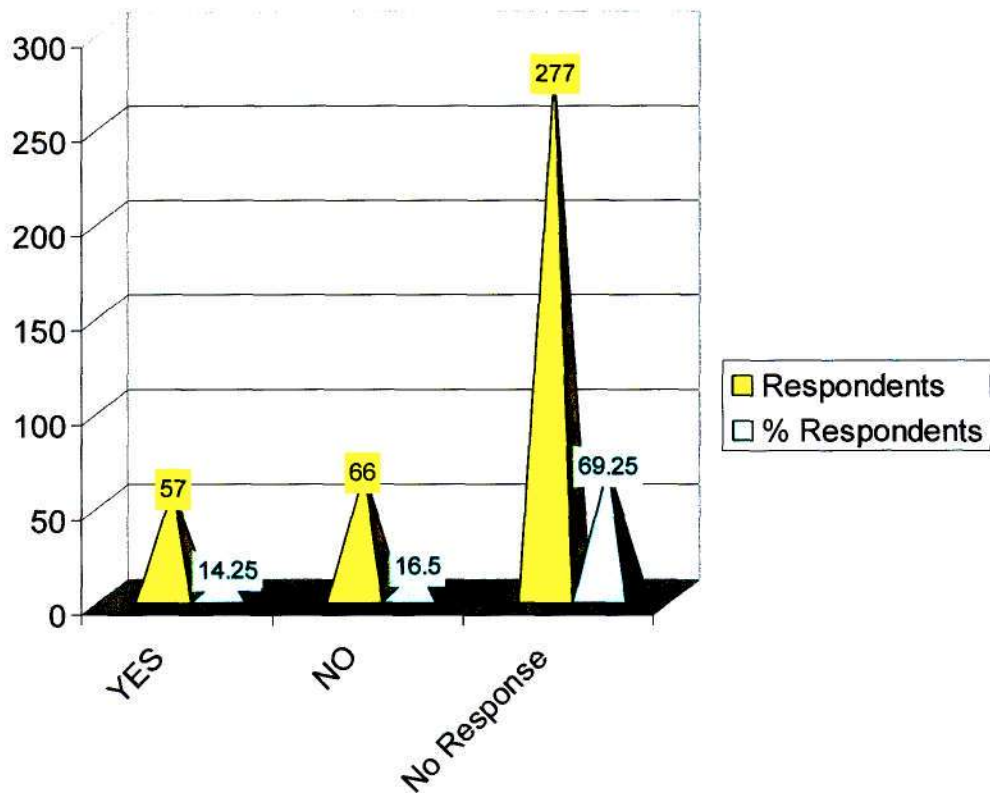
Have you seen the Sho't Left television game show?



12.75% have not seen the Sho't Left game show on television.

Question Five

Have you seen any of the Sho't Left adverts/marketing?

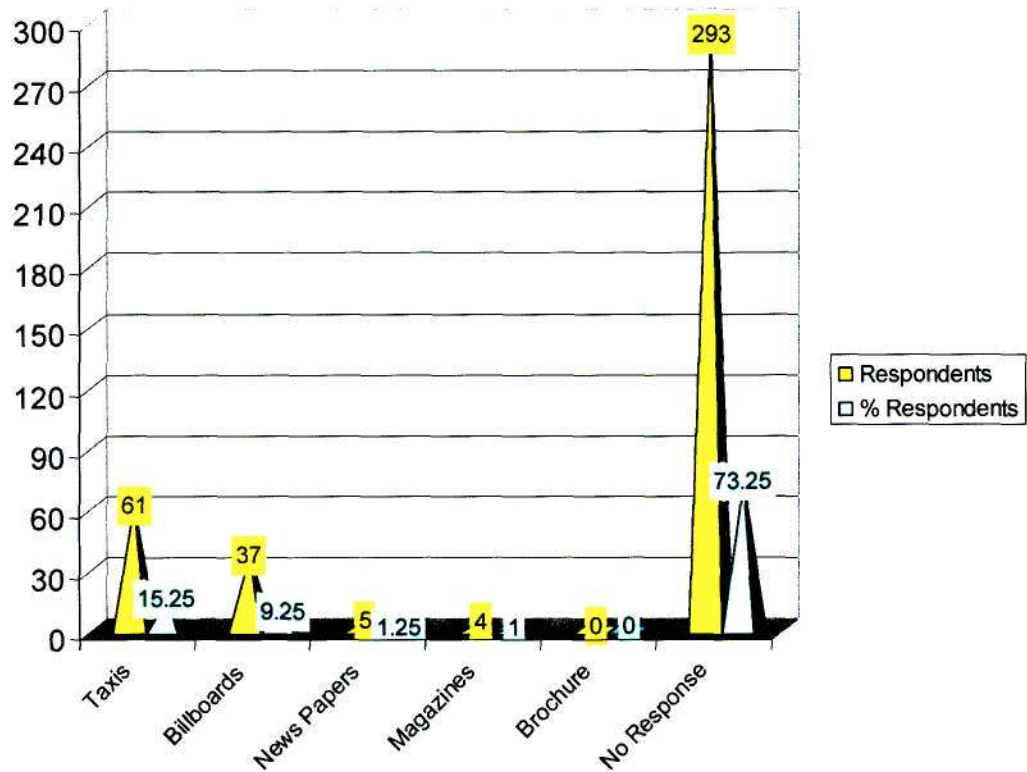


16.50% did not see any of the Sho't Left promotions. The current Sho't Left campaign needs to focus on the marketing and advertising to ensure a greater impact on the Orlando West area.

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Question Six

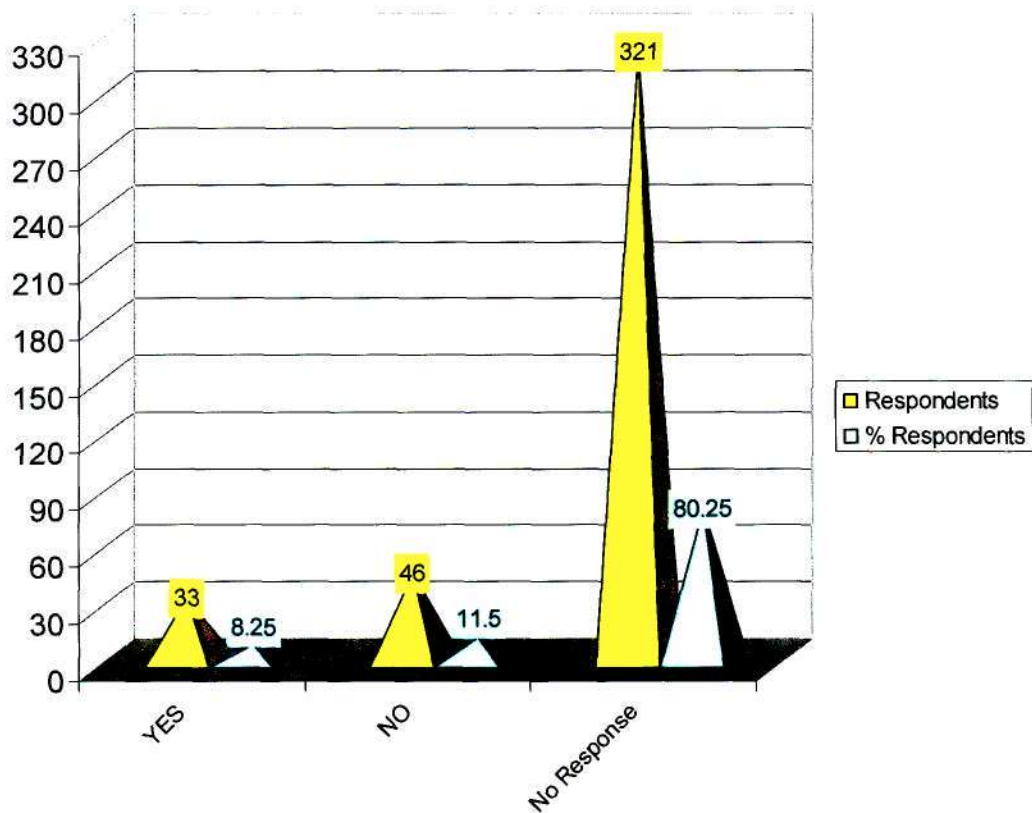
If yes, where did you see the advertising?



15.25% of the respondents had seen the promotion on the taxis and 9.25% had seen the advertisement on billboards. Taxi advertising is an effective medium and should be exploited in order to create a greater awareness of the Sho't Left campaign.

Question Seven

Do you think that the costs of the Sho't Left holiday packages are affordable?

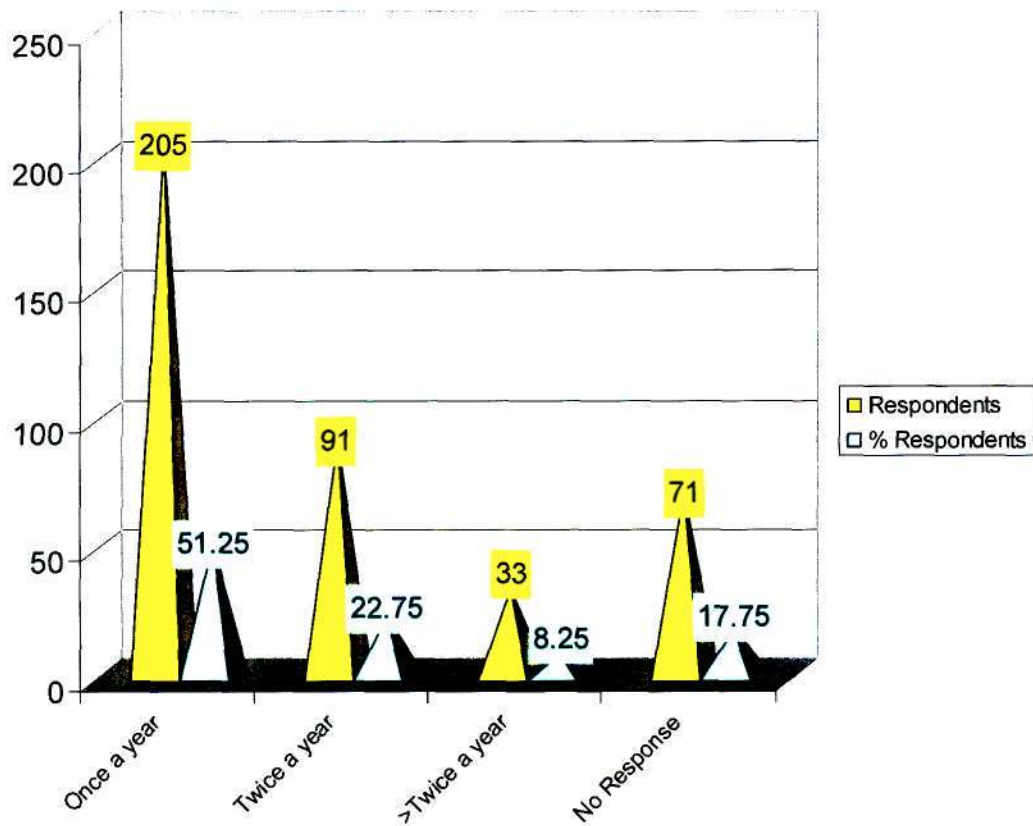


11.50% of the respondents did not think that the Sho't Left packages were affordable.

The packages within the tourism industry needs to be reviewed in order to create more affordable travel within South Africa.

Question Nine

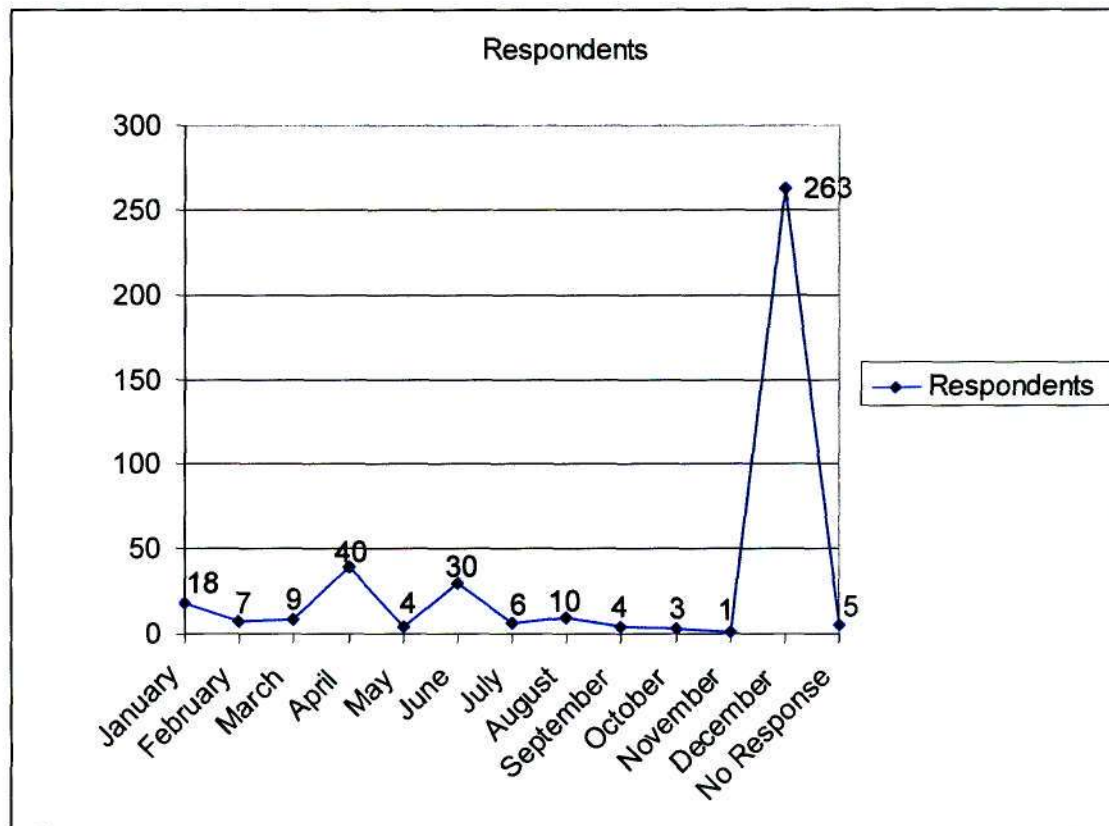
How often do you go on a domestic holiday per year?



51.25% of respondents go on holiday only once a year. This is important as packages should be made affordable during this period in order to increase leisure travel, however a clash exists here in terms of supply and demand issues and ways to address these issues should be sought.

Question Ten

When do you go on holiday?

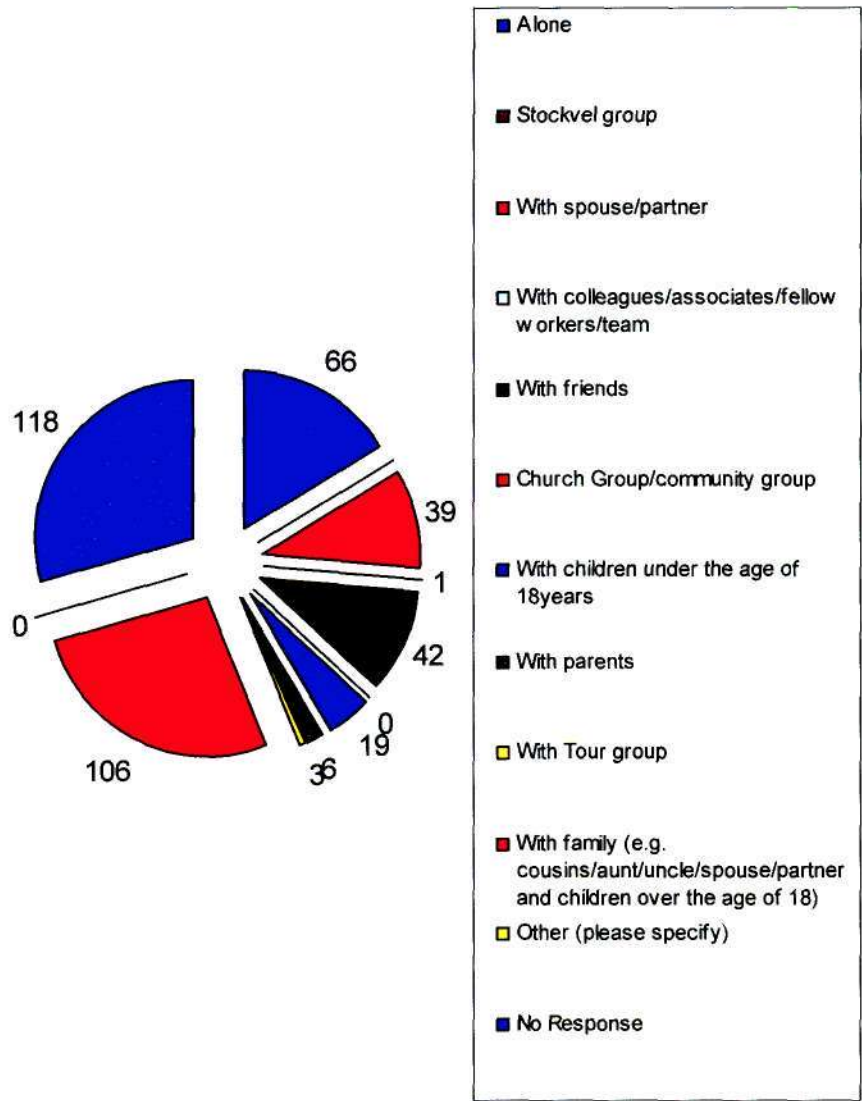


December is the time of year that most people go on holiday with 263 respondents confirming their time of vacation. Packages should be made available at affordable prices during the December period.

Question Eleven

How many people travel with you on holiday?

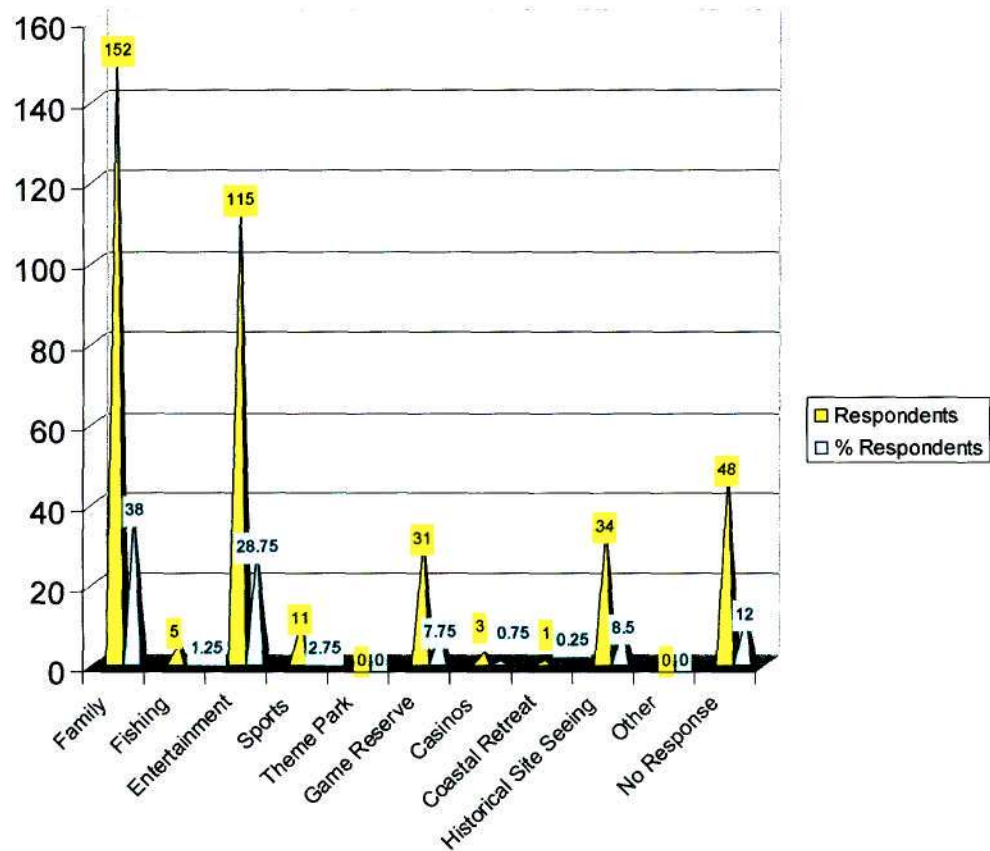
Respondents



Family trips are most common with the respondents as 118 respondents go on holiday together with their family. 106 respondents travel alone.

Question Twelve

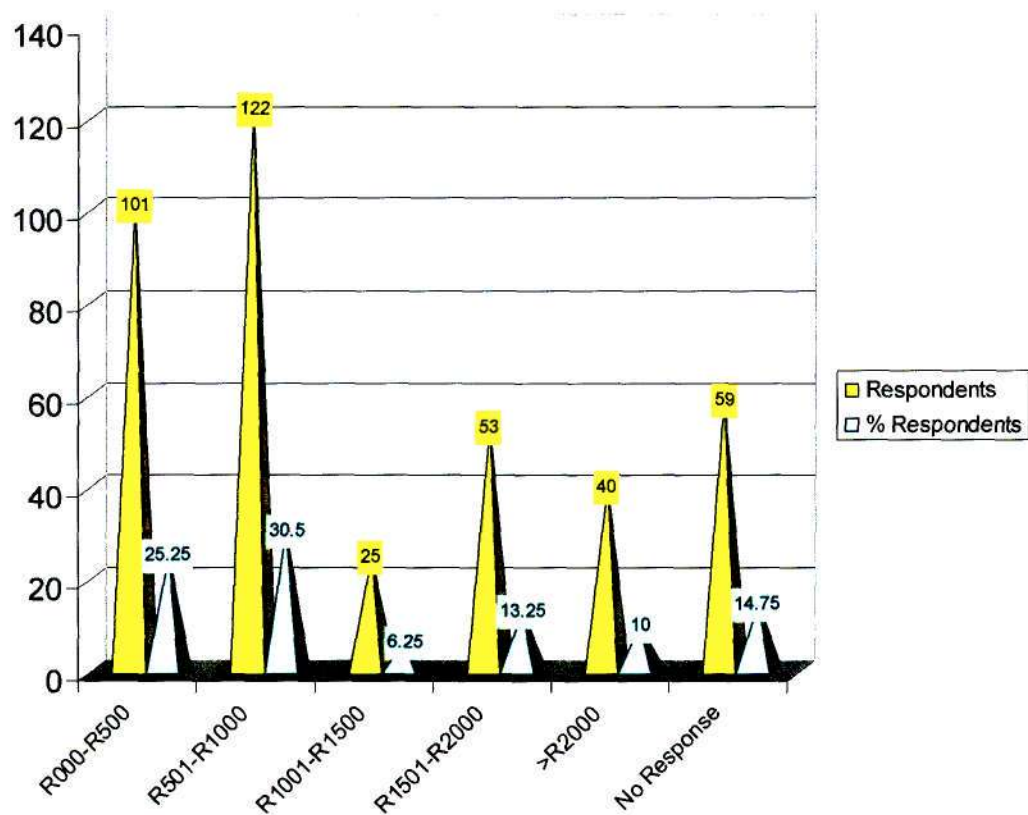
What is the most important consideration for you when you decide to travel?



Family and entertainment are the top 2 reasons for travelling with 38.00% and 28.75% of the respondents respectively.

Question Thirteen

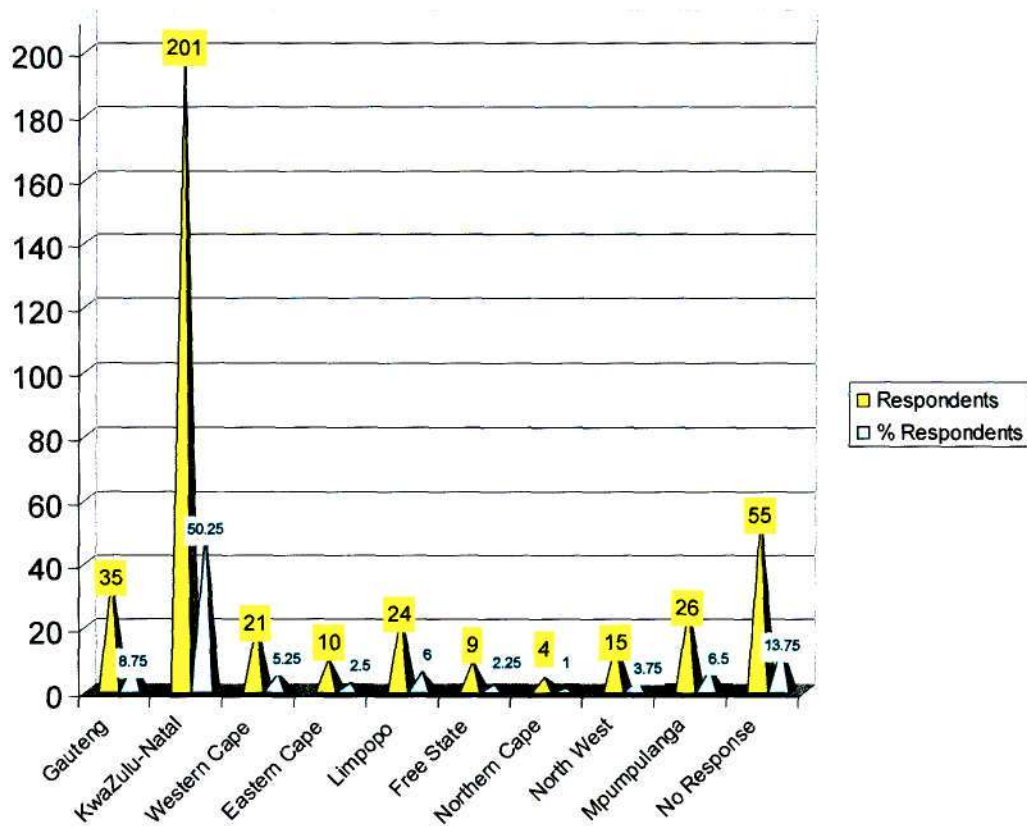
How much would you typically spend on a holiday?



Respondents are willing to spend below R1000 on a holiday as confirmed by 25.25% of the respondents. To influence a rise in leisure travel, holiday trips need to be more affordable to this segment of consumers.

Question Fourteen

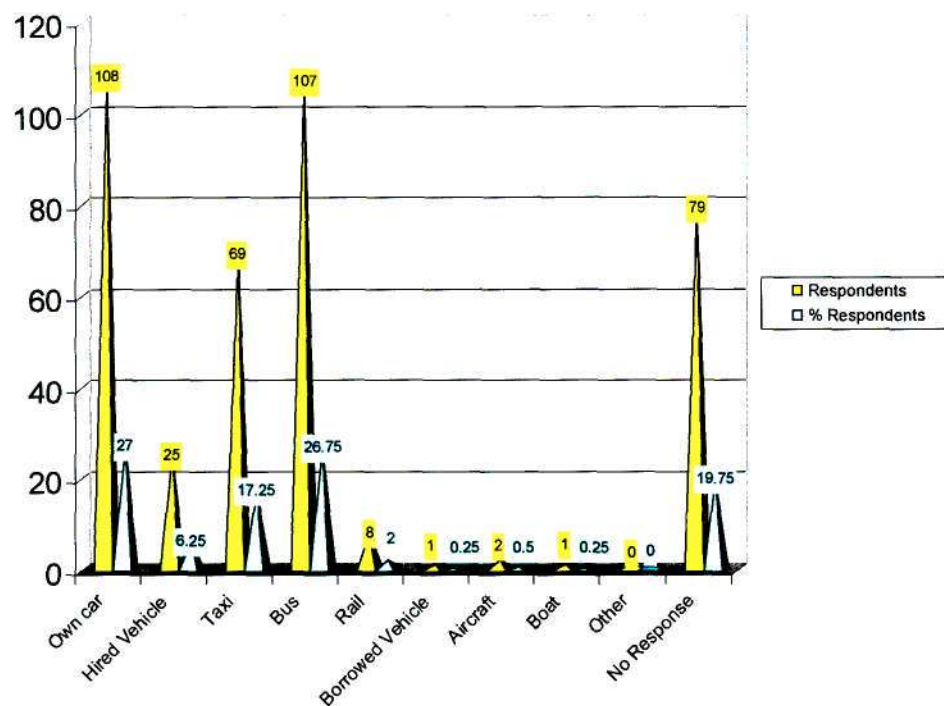
Which province would you typically go on holiday to?



KwaZulu -Natal is the province of choice of the respondents with 50.25%. Focus should be placed on creating KwaZulu-Natal as an affordable choice of holiday.

Question Fifteen

How do you normally prefer to travel?



27% of the respondents prefer to travel with their own transport and 26.75% prefer to travel by bus. Tour buses can be used to influence this segment to travel. Self drive packages can also ensure that these consumers go on holiday.

b) Open Ended Questions

Question Eight

How do you think the Sho't Left promotion can be improved?

Many respondents had indicated the following:

- i) More Road shows were requested.
- ii) Promotions need more packages to increase the variation and choice.
- iii) SATB needs to visit the communities, i.e. road shows and public relations.
- iv) More advertising needs to be done, i.e. pamphlets and billboards.
- v) Get the youth of the communities to be involved in the campaign e.g. in advertising and promotions.
- vi) They need to be more with the people in the form of public relations.
- vii) "I think the government should focusing first on the important programmes like health and education. Tourism will be a focus in time, for now people need to be educated and employed."

The responses reflect a need for SATB to advertise more within the communities in the form of road shows. Respondents also indicated a need for more effective packages and promotions for the Sho't Left campaign. SATB promotional material i.e. brochures and pamphlets, need to be made more readily available for the target market as this has been highlighted as a concern.

Question Sixteen

Do you think that SATB is making a concerted effort to ensure that the young and upcoming have access to affordable holidays? (If not why not)

Many respondents had indicated the following:

- i) Travel packages are very expensive.
- ii) Long distance domestic travel is expensive.
- iii) Travel is unsafe in South Africa.

The cost of packages for travelling was highlighted, they were seen as expensive and not “affordable” for this target market. Another concern of respondents is the safety of long distance domestic travel. SATB needs to research this further to gain an understanding of the “dangers” of long distance travel. Thereafter, produce recommendations to the South African Government in relation to solutions to this problem.

Question Seventeen

In your opinion, what could/should be done to stimulate the domestic market?

Many respondents have indicated the following:

- i) Improve transportation and infrastructure- “it is really unsafe and difficult to travel long distance.”
- ii) Tourist destinations are not accessible; transportation highlighted again as a problem.
- iii) Improve general marketing; create a culture of travel within South Africa.
- iv) Increase marketing on specific locations.
- v) Improve marketing - especially amongst the young adults. Advertising needs to be targeted at this segment.

Many respondents echo the previous responses i.e.

- Safety issues with long distance travel.
- Cost of travel packages.
- Promotion of the Sho't Left campaign.

These issues therefore need to be heeded in order for SATB to effectively promote the campaign amongst the young and upcoming.

Question Eighteen

How would you do this?

Many respondents had indicated the following

- i) Focus more on Domestic Travel.
- ii) International trips are advertised in the papers all the time, need more locally advertised domestic holidays.
- iii) Low cost accommodation needs to be improved; standards need to be implemented in the “cheaper” accommodation venues.

The responses indicate that SATB needs to become more focused in terms of its domestic tourism marketing. Though the Sho't Left campaign is an attempt to penetrate the market segments identified, it has not been that successful as evidenced by the lack of awareness within the target market and the low numbers of people who purchased a holiday on the promotion. SATB needs to focus on print media i.e. newspapers to communicate the message more effectively and make certain that its product offerings are priced right, are positioned correctly and are adequately promoted.

4.4 Reliability Measurement

The Test-retest reliability Method is used for the following:

- It is used to assess the consistency of a measure from one time to another.
- To determine if the score generalizes across time.
- The same test form is given twice and the scores are correlated to yield a coefficient of stability.
- High test-retest reliability tells us that if examinees would probably get similar scores if tested at different times.
- Interval between test administrations is important, (www.unl.edu).

To measure the reliability, the Test-retest method was applied. The results are as follows:

Covariance:58.4566
Standard Deviation (Test A):6.451
Standard Deviation (Test B):12.0115
Correlation Coefficient:0.7401

As the value is close to positive 1, we can conclude that the survey has been reliable, (DeFusco, et al., 2004, 380).

4.5 Validity Measurement

To measure validity of the study, the scores on one dimension of the initial survey were correlated against with scores on that domain during the second survey, (Content Validity). The correlation coefficient was derived.

Covariance:000437
Standard Deviation (Survey 1): 0.028071
Standard Deviation (Survey 2) 0.017889
Correlation (r): .08702

This correlation coefficient indicates a strong linear association between the test dimension in Survey 1 and the test dimension in Survey 2. Thus we conclude that the measurement procedures did measure the intended concepts, (DeFusco, et al., 2004, 380).

4.6 Conclusion

There was a fairly even amount of male and female respondents, i.e. 56.50% and 42.25% respectively. Due to the target market being Orlando West, the ethnic group most recorded was Black with 87.75%. The target age group was twenty to thirty years, most respondents fell into the thirty years age group, i.e. 35%. The level of education that was recorded the highest was Grade 10 with 49%. Most employees fell into the blue collar and farmer categories with 15.75% and 18.75% respectively. The target selection yielded most single or unmarried respondents with 76.5%. The monthly income of respondents fell mostly in the R0000-R2000 category with 35.75%. Orlando West was the chosen target market and 98.75% of respondents live in this area.

Most respondents had not heard of the promotion though some were vaguely aware of the promotion, with replies such as;, "You know I've seen it on TV, but just in passing, never really paid attention to it." The above statement echoes the response of most of the respondents.

The reliability testing has proved that if the survey will be carried out again, it would produce the same results and therefore it is reliable. The validity tests prove that the questionnaire did test what it set out to test.

The next chapter, chapter five, will discuss the findings of the research in relation to the objectives. The research will be concluded and the recommendations discussed.

Chapter Five: Conclusions and Recommendations

5.1 Introduction

This final chapter begins with an overview of why the study was undertaken, the objectives and ends with conclusions and recommendations. In addition suggestions for further research are made. Issues covered in the chapter include amongst others, the following:

- The problem statement
- The purpose and objectives of this study.
- The research methods and procedures.
- Summary of research.
- Recommendations.

5.2 The Problem Statement

Based on the researcher's exposure to the tourism industry, a perception exists that the South African Tourism Board's Sho't Left campaign, has not succeeded in getting the targeted segment to travel on its domestic holiday packages.

In the light of the perceived lack of success of the Sho't Left campaign it was decided to research it.

5.3 Review of the Purpose and Objectives

The purpose of the research was to conduct a study to measure the impact of the Sho't Left campaign in getting the young and upcoming, to book domestic holidays. Orlando West, was selected as it contains a suitable sample of the SATB's target market segment.

The objectives of this research were to:

- To investigate the effectiveness of the Sho't Left Campaign on the young and upcoming segment in Orlando West.
- To evaluate the Sho't Left domestic marketing campaign employed by the South African Tourism Board in relation to awareness.
- To consider the presence of the young and upcoming segment in Orlando West.

5.4. Review of the Methods and Procedures

The Survey was chosen as the research instrument. This involved creating a closed ended questionnaire, with a few open ended questions in order to elicit additional information. This study was cross sectional as it was defined by a time constraint.

As defined by Statistics South Africa, the population of Orlando West between the ages of 15 and 30 is 15, 826. A sample population of 400 would be suitable for a full statistical study. Fieldworkers asked the questions in the language of the respondent (whenever possible). and, a number of respondents did not complete them due to:

- Many were in a hurry to get to their destination via public transport.
- Some did not wish to divulge: age, earnings and other sensitive information
- Others were in a hurry to keep their appointments to conduct their business.
- The fact that many individuals were off to sports events.

5.5. Summary of Research

5.5.1 The Sho't Left Marketing Campaign

1. Based on the research it was concluded that the Sho't Left campaign has not created significant awareness of the campaign to promote leisure travel. Only 36% knew about the Sho't Left campaign indicating that the current advertising is only reaching a small amount of the target market in Orlando West.
2. A total of 27% of respondents indicated that they heard about the Sho't Left campaign through television. Radio advertising for the campaign only impacted 3.25% of the Orlando West respondents. Brochures for the Sho't Left campaign recorded the lowest medium of advertising with only 0.75%.
3. Only 1.25% of the total respondents ever took a holiday on the Sho't Left campaign. 31.75% have never taken a holiday on the Sho't Left campaign.
4. The Sho't Left game show was aired during 2005. The respondents indicated that 12.75% did not see this show on television.
5. The Sho't Left advertising was predominately seen on taxis and billboards with 15.25% and 9.25% of the respondents indicating their source of awareness of the campaign but did not translate in to travel.
6. The Sho't Left packages were seen as not affordable by 11.50% of respondents.

5.5.2 The Travel Research Results

1. Respondents in Orlando West tend to travel once a year. This is proved by the 51.25% of respondents stating their preference.
2. 263 respondents travel during the festive December period.
3. Respondents travel mainly with family or alone. This is confirmed with 26.50% of respondents stating their preference to travel with family and 16.50% travel alone.
4. Family and entertainment are the most important reasons for travelling. 38% travel to visit family and 28.75% travel for entertainment.
5. As indicated by respondents, 30.50% are willing to spend between R500-R1000 and 25.25% will travel for less than R500 only.

6. KwaZulu-Natal is the favourite destination of the respondents with 50.25% of the votes.
7. Own Cars are preferred modes of transport with buses a close second, 27% own car and 26.75% buses.

Open Ended Questions

Many respondents had indicated the following:

- SATB needs to ensure that the youth of the communities are involved in the marketing campaigns. This will attract the target market as they will identify with the advertising. This will also influence word of mouth and ensure that the advertising is being made known.
- SATB needs to drive more public relations with the specific target markets.
- Travelling packages are very expensive.
- The government should do more in reducing the cost of long distance travel.
- Improve transportation and infrastructure- “it is really unsafe and difficult to travel long distance.”
- Tourist destinations are not accessible; transportation highlighted again as a problem.
- Improve general marketing; create a culture of travel within South Africa.
- Increase marketing on specific locations.
- Improve marketing in order to create awareness of the packages available.
- Increase focus on Domestic Travel.
- International trips are advertised in the papers all the time, more domestic advertising is required.

5.6 The Impact of the Sho't Left Campaign on Tourism in Orlando West.

1. As noted in the example taken from the South African Tourism website, the Sho't Left campaign does not offer affordable travel in relation to the target market. 11.50% of respondents confirmed that the packages on the Sho't left campaign were not affordable and their salaries prove that.
2. 31.75% of the total respondents did not take a holiday trip on the Sho't Left campaign. This promotion started in 2004 and to date only 1,25% of the respondents from Orlando West have taken a holiday trip on the Sho't Left Promotion. This is a poor reflection of the promotion with so few trips taken and it suggests that a post mortem should be held to really understand why the campaign failed and what can be done to encourage more South Africans to tour within South Africa. Although there is awareness amongst the respondents, the marketing does not entice them to go on a leisure holiday with the packages associated with this campaign.
3. The Sho't Left Campaign has failed to influence consumers in Orlando West to travel as indicated by the results in Chapter Four. There is awareness though; this suggests that attention needs to be given to changing things from perception to consumption in the form of travel.

5.7 Recommendations

5.7.1 The Sho't Left Campaign

a) Objective One

- To investigate the effect of the Sho't Left Marketing Campaign on the young and upcoming sub segment in Orlando West.

It was concluded that:

The most important consideration for the respondents is visiting family as indicated by 38% of the respondents. Only 1.25% of the total respondents had taken a holiday on the Sho't Left campaign which is leisure travel. Therefore this indicated that the Sho't Left campaign has not been effective in relation to influencing the young and up coming to take a holiday (leisure travel) as opposed to visiting family. The main reason for the low conversion rate is that 35.75% of the respondents fall within the income bracket of below R2000. SATB must ensure that packages are affordable to the selected target segments. Many respondents placed emphasis on basic needs like health and education. Their perception is that tourism is a "luxury."

Recommendation

The target market needs to be researched in order to formulate packages. The cost of current packages is seen as not affordable. Due to the low income, SATB needs to focus on residential areas that can afford to travel and offer package to fit the budgets of such people. Orlando West largely falls within the low income bracket (<R2000) as presented in chapter four. This motivates greater research into other areas of Soweto, the target market of SATB for Shot Left, and indicates research throughout South Africa is necessary to ensure that campaigns are tailor made and focused on the correct target

market. Clearly this segment cannot afford the type of package offered on the Sho't Left promotions. The emerging market is only 0.75% of the respondents and confirms the problem of the incorrect target market within Orlando West.

b) Objective Two

- To evaluate the awareness that has been created by the Sho't Left domestic marketing campaign employed by the South African Tourism Board.

It was concluded that:

The South African Tourism Board has not created significant awareness of the Sho't Left campaign as indicated by the results of this research as only 36% of the respondents were aware of the Sho't Left campaign. Consumers are not aware of the offerings of the campaign which is shown in the low numbers that have heard about it. The consumers that had "heard" about Sho't Left did not understand nor comprehend what it is about. An example of a respondent's statement echoes the lack of awareness of the Sho't Left campaign: "I've seen it on TV, but just in passing, never really paid attention to it."

Consumers have indicated that television is the most important above the line Media for Sho't Left, Taxi Advertising and billboards have been effective in creating awareness of the Sho't Left campaign. SATB has created a degree of awareness however due to the branding, respondents did feel that they heard it but never really grasped the marketing concepts. Although they have heard about the Sho't Left campaign, SATB has not succeeded in converting these consumers to travellers and more needs to be done to influence this segment to travel.

Recommendation

SATB must increase marketing efforts within the target market to create awareness of the campaign. The mediums as discussed are television, taxi advertising and billboards. The more a consumer “experiences” the brand by seeing it, hearing it, or thinking about it, the more likely it is that the brand will become strongly registered in memory, (Keller, 2003, 69). This re-enforces that more marketing initiatives must be undertaken by SATB.

c) Objective Three

- To consider the presence of the young and upcoming sub segment of the emerging market in Orlando West.

It was concluded that:

The target market defined by the South African Tourism Board needs to be re-visited as many consumers fall out of the emerging tourism range. 35.75% of all respondents fall below the R2000 income bracket. 11.50% of respondents indicated that the costs of the packages were too high and out of their affordability.

The “emerging” target market defined by SATB falls into the R10 000 and above income bracket, (SATB, 2004). Only 5% earn between R8000 –R10 000 and only 0.75% earns more than R10 000. This is an indication that the target market of Orlando West does not fall into the emerging segment.

The larger percentage i.e. 35.75% falls below the R2000 income bracket and therefore would confirm that these consumers fall into the untapped market. The conclusion therefore is that the current segment that SATB targeting is actually the untapped market and not the emerging market.

Recommendation

The focus of the Sho't Left campaign is the young and upcoming market as defined by SATB, (SATB, 2004). Currently the Orlando West area is clearly defined as an untapped segment due to the evidence stated above. Marketing research is therefore recommended to define the target market in order to formulate effective marketing strategies.

Under the previous government, black people were not allowed to own property. Andrew Golding, (2005), confirmed that after 1994, the average black household's share of disposable income increased from 30% in 1994 to 45% in 2003. He further stated that the residential property market has benefited from improved black spending, which has changed consumer buying patterns, particularly in densely populated urban areas such as Gauteng (Golding, 2005). This indicates a shift of urban residential preferences of the black households and indicates that the emerging market may to an extent have geographically relocated to areas not targeted by the Sho't Left campaign and this could be one reason why so few sales were recorded.

There is a need for further research into these specific target markets to ensure that the consumers that are being targeted have not re-located into newer up market suburbs of Johannesburg and as such are not exposed to such campaigns that are run in different geographical and market segments.

5.7.2 The Travel Research Recommendations

Orlando West consumers travel once a year and it is predominantly during December. The destination of choice for travel is KwaZulu-Natal. These consumers mainly travel with their families or alone. The reasons for travelling include visiting family and entertainment. The current budget to spend on a holiday is less than R1000. Own cars and buses are the main choice of transport mode for travelling.

An example of the cost of a Sho't Left package is R870.00/adult sharing and R1220/adult and R550.00/child for weekend away to Durban. In comparison, an internet booking for City Lodge, (www.bid2stay.co.za) often affords a tourist the opportunity to book a room for 2 adults and 2 young children for as low as R600. SAA periodically have their Fly-Stay & Drive packages to Cape Town for extremely competitive rates and SATB should look at good examples and should develop linkages.

Whilst these packages may appear to be attractive and keenly priced, they are clearly not affordable by most of the target segment as 35.75% of the respondents earn less than R2000 per month.

5.8. Suggestions for Further Research

- SATB should initiate in-depth consumer research in order to understand the target market needs. A study of people's income in the target segments in order to position and promote the appropriate packages to the target segment is essential. Crawford and Di Benedetto (2003) confirm that Market research can measure a particular market.
- A larger scale study is recommended to fully research the Sho't Left campaign on the young and upcoming target market. Such research may uncover information which will enable SATB to put together packages that are meaningful to and affordable by the target segments. Further to this a study of the defined target market segments to ensure that SATB promotions are aimed at the correct targeted segments and ensure that the product offerings are appropriate and needed.
- Safety of long distance travel was revealed as a critical reason why consumers do not want to travel. The fears of consumers need to be addressed in relation to travel thereby alleviating any misconceptions of travel and tourism in South Africa. This area of travel should be researched to investigate the problems with this particular area of the tourism industry.
- A larger scale study of this nature needs to be undertaken in order for SATB to be better equipped to understand the needs, wants and dreams of domestic tourists. South Africa has a very diverse group of cultures, history, and traditions. Due to this diversity, the various segments will need to be researched to gain an understanding of the needs and wants in order to structure marketing promotions to target these segments.

5.9 Conclusion

As defined by Perreault and McCarthy, (2002, P73), the market segmentation is a two step process;

1. Naming broad product –markets
2. Segmenting these broad products –markets in order to select target markets and develop suitable marketing mixes, (Perreault and McCarthy, 2002, P72).

In developing the domestic tourism growth strategy, SATB has followed the marketing strategy process by segmenting the domestic tourism market and then choosing a target market. The target market consists of three sections i.e. established, emerging and untapped. The emerging and untapped markets consist largely of previously disadvantaged individuals who have previously not had the opportunity to travel and experience commercial tourism offerings.

The young and upcoming was chosen for this study. SATB has chosen the multiple target market approach (Perreault and McCarthy, P76) as these target markets, as stated above, have their own marketing mix developed according. A key element of the SATB growth strategy is to co-operatively promote packages and experiences in targeted segments, (SATB, 2004).

In the report of the World Travel and Tourism organisation (2002), (The impact of travel and tourism on jobs and the economy, 2002), the main problem of tourism in South Africa is highlighted. The report states that the insufficient focus on implementation has limited the return on investment and caused targets to be consistently missed. Therefore this formed the basis to test the impact of the South African Tourism Board's current growth strategy

The lack of awareness and lack of disposable income are the important findings of this research. The current marketing efforts of the South African Tourism Board are not creating enough awareness within Orlando West. The SATB's target market needs to be reviewed to ensure that consumers within the defined target markets are offered tours that they are able to afford. SATB needs to re-engineer packages and promotions to ensure affordability within the specific segments in order to create a culture of tourism.

The South African Tourism Board's Sho't Left campaign has made minimal impact in creating an awareness of domestic tourism. This is confirmed by the findings where a small percentage of respondents recalled the adverts and even fewer respondents booked travel packages related to this campaign.

Product

Perrault and McCarthy, (1999, P249) state that the goods or services should satisfy the customers' needs. As per low response, consumers are not using the Sho't Left promotion. The information gathered i.e. where consumers prefer to travel and how consumers want to travel, detailed in this report, will enable SATB to develop "products" that satisfy the consumers needs. It is necessary to build brand loyalty among consumers, and achieve brand preference ultimately brand insistence if possible, (Bhowan et al, 2001, P11).

Pricing

Respondents are willing to spend less than R1000 on holiday. Packages need to be streamlined to accommodate the consumer's budget and fall within the desired. Pricing strategies are vital in order to impact a selected target market. SATB needs to implement the market –penetration pricing strategy, (Bhowan, et al., 2001). Kotler identifies nine price strategies, (Bhowan, et al., 2001, P32). The target market must be taken into account and currently the low price strategy will be effective.

Promotion

As requested by respondents, outdoor promotions and more visual advertising in the form of television and print is needed in order to create an awareness of the Sho't Left campaign. The DAGMAR model can be used to create awareness of the Sho't Left campaign, (Bhowan, et al., 2001, P104). As Keller (2003, P69) states, the Sho't Left brand needs to be continuously exposed to the consumers to ensure that the campaign creates awareness.

Place

Bhowan et al., distinguishes 3 categories of distribution being, Exclusive, Selective and Intensive. The objective of the intensive is widespread market coverage; channel acceptance, high sales and profit, and this can be used effectively for the Sho't Left campaign, (Bhowan, et al., 2001, P71). The Sho't Left advertising on television does not define the pricing but prompts consumers to the website or call centre. SATB should run ads with the most effective special offers on television. Brochures with details should be given out at taxi ranks and should be more freely available.

Sho't Left is the marketing campaign for the SATB's domestic tourism growth strategy. Sho't Left includes specific holiday packages and promotions that are aimed at the target segments in order to attract them to go on holiday, (SATB, 2004). Regrettably the Sho't Left campaign failed to generate sales and failed to create a culture of tourism in the target market segments. The reasons are cost and affordability, questionable advertising as far as media used, unsuitable promotions and the lack of a true marketing plan and strategy.

This study researched the impact of the Sho't Left Campaign on tourism in Orlando West. It was concluded that the campaign was flawed and the recommendations made, are based on marketing and other business concepts in order that SATB may modify the campaign to be more effect in future.

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Appendix One: Sho't Left Questionnaire

Part A: Demographic Questionnaire

NO	Questions		
Q1	Gender	Male	1
		Female	2
Q2	Which ethnic group do you belong to?	Black	1
		Asian	2
		Indian	3
		Coloured	4
Q3	What is your age?	Twenty	1
		Twenty one	2
		Twenty two	3
		Twenty three	4
		Twenty four	5
		Twenty five	6
		Twenty six	7
		Twenty seven	8
		Twenty eight	9
		Twenty nine	10
		Thirty	11
Q4	What is your level of education	Grade 08	1
		Grade 10	2
		Graduate	3
		Post graduate	4
Q5	What is your occupation?	Management	1
		Professional/Specialist	2
		Self Employed/Own Business within the formal sector	3
		Self Employed/informal Sector e.g. Hawkers/Vendors/shebeens)	4
		Blue Collar-skilled/semi skilled	5
		Unskilled	6
		State Employee/Civil Servant	7
		Farmer	8
Q6	Which of the following describes your martial status?	Other (specify)	
		Single, never married	1
		Married or living together	2
		Divorced/widowed/separated	3

Q7 What is your monthly income?

R0000-R2000	1
R2001-R4000	2
R4001-R6000	3
R6001-R8000	4
R8001-R10 000	5
>R10 000	6

Q8 Where do you live?

Orlando West	1
Orlando East	2
Orlando North	3
Orlando South	4

Part B: Detailed Questionnaire**NO****Questions**

Q1 Are you aware of the Shot' Left promotion?
(if no, please go to Question 8)

Yes	1
No	2

Q2 How did you hear about the Shot' Left promotion?

Television	1
Radio	2
Billboard	3
Brochure	4
Other	5

If Other please specify:

Q3 Have you taken a holiday on one of the Shot' Left promotions?

Yes	1
No	2

Q4 Have you seen the Shot' Left television game show?

Yes	1
No	2
Don't know	3

Q5 Have you seen any Shot' Left adverts/marketing?

Yes	1
No	2

Q6 *If yes, Where did you see the Shot' Left adverts/marketing?*

Taxis	1
Billboards	2
News Papers	3
Magazines	4
Brochures	5

Q7 Do you think that the costs of the Sho't Left holiday packages are affordable?

Yes	1
No	2

Q8 How do you think the Sho't left promotion can be improved?

Q9 How often do you go on a domestic holiday per year?

Once a year	1
Twice a year	2
>Twice a year	3

If other please specify

Q10 When do you go on holiday;
(Multiple choices are accepted)

January	1
February	2
March	3
April	4
May	5
June	6
July	7
August	8
September	9
October	10
November	11
December	12

Q11 How many people travel with you on holiday, (choose one only)?

Alone	1
With spouse / partner	2
With friends	3
With children under the age of 18 years	4
With parents	5
With family (e.g. cousins/aunt/uncle/spouse/partner and children over 18 years)	6
With colleagues, associates, fellow workers, team	7
Stockvel group	8
Church group / community group	9
With tour group	10
Other (specify)	11

Q12 What is the most important consideration for you when you decide to travel?

Family	
Fishing	
Entertainment	
Sports	
Theme Parks	
Game Reserves	
Health Spa	
Casinos	
Coastal Retreat	
Historical Site Seeing	

If other please specify

Q13 How much would you typically spend on a holiday?

R000-R500	1
R501-R1000	2
R1001-R1500	3
R1501-R2000	4
>R2000	5

Q14 Which province would you typically go on holiday to?

Gauteng	1
Kwazulu Natal	2
Western Cape	3
Eastern Cape	4
Limpopo	5
Free State	6
Northern Cape	7
North West	8
Mpumpulanga	9

Q15 How do you normally prefer to travel;

Own car	1
Hired vehicle	2
Taxi	3
Bus	4
Rail	5
Borrowed vehicle	6
Aircraft	7
Boat	8

If Other please specify;

Q16 Do you think that South African Tourism is making a concerted effort to ensure that the young and up coming have access to affordable holidays? (if not why not)

Q17 In your opinion, what could/should be done to stimulate the domestic market?

Q18 How would you do this?
