Chapter 11 Marketing Plan

Garden Route Planning Domain

This chapter provides a marketing and implementation programme for the tourism development proposals for the planning domain.
Chapter 11 Marketing Plan

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11.1 Introduction

The Garden Route Planning Domain is a complex tourism destination and product with a long history, well established brand, mature tourism economy, diverse tourist market, numerous public sector management agencies and a wide range of marketing plans and strategies for many of the spatially divergent areas that comprise the Garden Route planning domain.

The Garden Route has over the past forty years become a well-established and secure tourist destination and brand with the domestic and overseas market. This brand is entrenched in the domestic market, domestic tour operators and overseas travel agents. However, the definition of the Garden Route brand is not particularly clear and has different meaning to the different market segments. However, a general understanding of the Garden Route brand is focused on the N2 National Road between Mossel Bay and a fuzzy boundary somewhere between the Storms River and Port Elizabeth, and all the tourism related areas immediately adjacent to the N2 National Road. Many tourism products are claimed to be in or associated with the Garden Route in order to optimise the benefits associated with such a strong and entrenched brand, even when clearly that they are not. Such opportunism has further confused the definition of what exactly is the Garden Route tourist destination and where exactly it is.

The advent of new district and local municipalities in the post 1994 period with politically correct names has added further to the confusion surrounding the Garden Route brand and definition of the Garden Route as a destination. Although politically correct, these new names have little meaning, significance or spatial definition to the consumers of an old and entrenched brand, particularly amongst the overseas market. The new local and district municipalities embraced tourism as an economic activity, a potential vehicle for economic and rural development and a mechanism for addressing some of the inequalities plighting historically disadvantaged communities of their jurisdiction. These authorities rapidly established tourism development and marketing agencies tasked with promoting their jurisdiction as a tourist destination, a tourism investment location and the wide range of benefits that tourism could bring to their historically disadvantaged communities. These sentiments were promoted widely by local politicians, who with little understanding of the economics and mechanisms of tourism development, created a highly unrealistic expectation amongst previously disadvantaged communities as to the benefits that they may receive from the rapidly growing tourism economy along the Garden Route. The promotion of these smaller brands within the context of the larger Garden Route brand has diluted and confused the market knowledge and confidence in the regional Garden Route brand. However, initiatives to overcome this effect are appropriate and have achieved some headway in overcoming this brand identity issue.

Entering into this confused tourism image and brand of the Garden Route is the recently proclaimed Garden Route National Park. Recent market research of
stakeholders and tourists revealed that there was a general understanding and knowledge of where this new National Park was (due to its name) but little comprehension of what comprised the National Park and what experiences could be enjoyed in the Park. Confusion is compounded by the concept of a Garden Route Initiative / Mega-park in which three protected area management agencies manage in association with many private land owners a large expanse of land in the area known in tourism circles as the Garden Route.

This confusion of definition clearly identifies the primary characteristic of the Garden Route planning domain as a spatially disparate area of diverse tourism resources, attractions and experiences. The challenge in establishing a marketing plan for the Garden Route planning domain is in establishing a unified brand for destination of such high diversity that is, in fact, its key selling feature.

11.2 Strategic framework

The strategic vision for the planning domain is:

“To strive to develop sustainable world class nature-based tourism experiences integral to the Garden Route tourism economy that optimizes benefits to local communities, stimulates the regional tourism economy, conserves and enhances natural, historical and cultural tourism resources within agreed limits of acceptable change.”

The specific aims to accomplish this vision are:

• To establish a unique, consolidated and identifiable tourism image and brand for the Garden Route Planning Domain.
• To conserve and enhance the tourism and recreation resource base of the Garden Route Planning Domain.
• To optimise economic returns from tourism and recreation in the Garden Route Planning Domain.
• To ensure a high quality visitor experience in the Garden Route Planning Domain.
• To rectify historical imbalances in the tourism economy of the Garden Route Planning Domain that impact on historically disadvantaged people.

This strategic framework assists in focusing the marketing plan for the planning domain towards the primary aims of tourism development in planning domain.

11.3 Market overview

A detailed market assessment is described in Chapter 4 that contextualises the planning domain in a national and regional context. However, there are some key characteristics that emanate from this assessment that have relevance to a marketing plan, which are summarised below.
11.3.1 Origin of visitors to the “Garden Route”

The majority (55.5%) of the visitors were from overseas, 43.7% were domestic and 0.8% from Africa (excluding domestic). The top overseas source markets of the international visitors were: the UK (28.5%), the Netherlands (6.2%), Germany (5.3%) and Sweden (2.5%). South Africa was the largest single source accounting for 43.3% of the visitors.

Of the domestic visitors most (37.6%) were from within the Western Cape, 29.3% from Gauteng, 8.9% from the Eastern Cape, 7.6% from Kwa-Zulu Natal and 6.4% from Free State (Figure 1).

![Figure 1](image)

Figure 1 The province of origin of domestic visitors on the Garden Route.

**Mode of transport**

Tourists visiting the planning domain predominantly\(^1\) travel as self-drive tourists or part of an organized tour. Very little use is made of public transport except air travel to fly to George and Port Elizabeth from where the other two forms of road transportation are engaged.

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\(^1\) Comprehensive research has not as yet been undertaken that reveals accurately the mode of transport of all visitors to the planning domain.
The majority of domestic tourists travel as self-drive tourists. The majority of domestic tourists visiting the Garden Route planning domain travel in their own motor vehicles with a small proportion making use of hired vehicles. Overseas tourists in the planning domain travel either as independent travellers usually in hired sedan-type vehicles or as members of an organized, guide tour provided by a wide range of tour operators varying in size from large national corporations to small, one-man tour companies operating a single microbus.

**Group Size**

The median travel group size is two for the overseas market and three for the domestic market. The percentages for both overseas and domestic tourists combined, as determined by an visitor survey of people entering tourist information offices on the Garden Route, illustrates the overwhelming trend for tourists to travel in parties of two along the Garden Route.

<table>
<thead>
<tr>
<th>Number of pax</th>
<th>1 person</th>
<th>2 people</th>
<th>3 people</th>
<th>4+ people</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>7,3%</td>
<td>59,8%</td>
<td>10%</td>
<td>16,9%</td>
</tr>
</tbody>
</table>

**Length of stay**

One of the primary aims of tourism development in the planning domain is to lengthen the number of days that visitors spend in the planning domain. Lengthening the average visitor’s stay in the planning domain by one day or night may increase the economic benefit to the area by up to a quarter. Therefore, significant attention should be paid in the marketing plan to lengthening the stay of visitor that comes to the planning domain.

Statistics relating to length of stay of visitors on the Garden Route are contradictory due to the inconsistent definitions and data collection methodologies used to gather length of stay data. Although exact statistics would be useful, certain trends are noticed and supported by tourism stakeholders in the planning domain. These trends are:

**Overseas tour groups**

Overseas tour groups have traditionally spent two nights and three days in the Garden Route usually travelling between Cape Town and Port Elizabeth. This trend has persisted for decades and is reinforced by overseas travel agents and local tour operators providing tours demanded by overseas travel agents and tour companies. A concerted marketing effort and the supply of appropriate attractions and experiences aimed at overseas tour group market needs to be initiated so as to break this traditional, accepted perception. An increase in the length of stay of this
market will have a significant positive economic impact on the planning domain. Marketing and promotion efforts should target overseas tour operators and travel agents to change this perception that the Garden Route is a three day / two night transitory destination. Similarly, local tour operators should be encouraged and pressurized to compile and promote longer tours in the planning domain.

Overseas self-drive tourists

Overseas self-drive tourists are more flexible in length and nature of itineraries, generally have more time to spend in the planning domain and have the ability to travel away from the traditional and popular tour routes in the planning domain because they are self-driven and plan their own itinerary.

This market tends to make a decision as to how many days they plan to stay in a tourism destination region, then plan a skeleton itinerary of the points of interest and experiences they wish to have in the destination area. They also tend to factor in some spare time to experience attraction that they discover once in the destination region. This market may readily be influenced once they are in the destination region, but that convincing will take place at an individual level.

Marketing and promoting to this market needs to be undertaken via (i) the Internet (preliminary research is undertaken on the Internet and compilation of skeleton itinerary is Internet influenced), then (ii) paper-based promotion material collected at airports, in-flight publications and DVDs, then (iii) material gathered at tourist information offices outside of the Garden Route planning domain, then (iv) the information and interpretation material viewed while travelling to and within the planning domain; then (v) at tourism information offices in the planning domain, and finally (vi) word of mouth recommendation which is usually the most successful in securing consumption of tourism experiences by this market. This process will impact on the length of time this type of tourist spends in the planning domain (within the maximum number of days initially planned to spend in Western / Eastern Cape as defined by airline reservations).

Domestic self-drive transitory tourists

This market segment tends to undertake minimal research prior to departing on a transitory tour through the Garden Route planning domain. The primary reason for this action is that they are already knowledgeable about the planning domain and will focus their attention of securing accommodation reservations, and then decide what to see and do once they have arrived in the planning domain. However, the general trend is that they will spend little time traversing through the planning domain (usually no more than one night) as they are on their way to a destination
outside of the planning domain at which they would want to spend the bulk of their time.

The marketing challenge for this market segment is to provide them with the knowledge of the full range of tourism experiences in the planning domain so that they plan to spend more time traversing the planning domain. Convincing takes place at two points in time during their travel experience (i) when planning their trip framework and (ii) while on the road trip through the planning domain. The first point can be influenced by appropriate information delivered by public radio and television, adverts and advertorials in leading, popular newspapers and magazines and Internet-based information.

**Domestic multiday holiday market**

This is the traditional domestic market that visits the planning domain during the ultra-high tourism seasons. This market comes to the planning domain on a traditional multi-day holiday usually as a family, couple or group of friends. Holiday accommodation may be in their privately owned holiday houses, rented holiday houses or in the full range of hospitality facilities, although a preference is for self-catering, proximity to the sea, public sector managed accommodation (perceived as less expensive than private sector accommodation). Camping is popular with that segment of this market with less disposable income.

Once members of this sector of the market are in the planning domain on their multi-day holiday, they then look for activities to experience in the planning domain to do. Advertising and promotional material in supermarkets and cafés have a significant impact on this market segment, particularly if the information is current. This segment has started to use the Internet in increasing numbers to seek leisure and recreation activities to do in the planning domain, particularly with the advent of smart cellular telephones that are able to access the Internet. The problem with this market segment is that it is seasonal primarily to the ultra-high and high seasons. The challenge is to try to spread visits by this market over a greater number of days in year, particularly in less busy periods and to less popular attractions and experiences in the planning domain during the peak ultra-high season.

**Mode of transport and Purpose of visit**

Cars (98.1%) were predominantly the most popular mode of transport in the destination for all visitors, both domestic and overseas. The remaining small proportion 1.9% used other modes of transport including rail and bus. All the visitors who used rail were from overseas. For both overseas and domestic visitors, the majority (97.9%) were on holiday and only 1.3% were in the destination on business. The remaining minute
proportion (1%) were in the Garden Route for other purposes including honeymoon and religion.

**General comments**

Visitors were given the opportunity to give their opinions regarding their experience in the Garden Route. All the comments were positive regardless of origin of visitor and location. All the visitors, from overseas and domestic alike rated the destination as great and that there were very helpful and friendly people in the destination. There was not a single negative comment about the Garden Route from the visitors in Quarter 1 2007.

**11.4 SWOT Analysis**

**11.4.1 Strengths**

- Well-established Garden Route brand.
- Garden Route a destination in its own right.
- Forty-year history of being a successful tourist destination.
- Stable, traditional markets.
- Supply of tourism and hospitality products and investment has had significant growth over past fifteen years.
- Popular with domestic and overseas markets.
- Has a large traditional domestic, multi-day family holiday market.
- Market has grown over past fifteen years and has not been majorly affected by global economic downturn.
- Has a wide range of tourism products and experiences that appeal to numerous market segments.
- Brand includes the element of diversity of experiences.
- Good quality websites for SANParks and Cape Nature. Eastern Cape Parks Board website is sub-standard.

**11.4.2 Weaknesses**

- Perceived as a seasonal destination even though some of the best weather is during the low winter season.
- Mature destination and no longer considered a “trendy” destination except during the Oyster and other festival periods.
- Treated by overseas travel agents and tour operators as a stereotyped destination.
- Difficulty in marketing a multifaceted, spatial disparate tourism economy.
- Have not been able to change overseas perception of Garden Route and planning domain.
- Multiple government and private sector agencies marketing planning domain resulting in inefficiencies, conflict of interest, competition and possible confusion.
- New politically correct names of districts and tourism products weaken product knowledge and identity with existing market segments.
• Protected areas in planning domain managed, marketed and promoted by three protected area management agencies that also only do reservations for their own facilities, which becomes confusing and difficult for consumers.
• Does not address needs of historically disadvantaged communities.
• Lack of reliable tourism statistics for planning domain.
• Insufficient market research impacts upon market decision making.
• Inconsistent marketing activity to date for whole of planning domain.
• Lack of marketing specifically aimed at tour operators to change perception of Garden Route as a two night, three-day destination.
• Lack of continuity of, and inconsistent leadership in public sector regarding the management of tourism over the past fifteen years in the planning domain.
• Loss of Outeniqua Choo-tjoe as an icon tourist attraction and photo opportunity.

11.4.3 Opportunities

• Opportunity to make a significant impact on all market segments through the effective utilization of the three proposed Activity Centres on the N2 National Road where market and promotion of tourism products and experiences in the planning domain is a primary function.
• Growing access and use of Internet providing increase opportunity to provide more, accurate and current information to potential visitors.
• Accepted policy of SANParks and Cape Nature to discount tariffs during low seasons.
• New Garden Route National Park will consolidate ecotourism offerings in the planning domain from the perception of the visitor.
• Proposed new Goukamma Rest Camp can be used to revitalise a tired, mature SANParks coastal products in planning domain.
• Proposed tourism products in the Wilderness Gateway TDN with railway and boat cruise linkages will assist creating a new range of tourism products particularly for the overseas tour group market.
• Growing outdoor, nature-based user market for multi-modal trails.
• Increasing proportion of historically disadvantaged communities becoming middle class with increased levels of disposable income for leisure and recreation pursuits.

11.4.4 Threats

• Global financial crisis and declining number of overseas and domestic visitors to the planning domain.
• Overseas tourists’ perception of crime and political instability due service delivery protests.
• Growing informal settlements bordering the N2 are impacting on the natural beauty expected of the Garden Route.
• Declining tourism image of the Garden Route as being a collection of sleepy, small coastal villages in a scenically beautiful natural environment.
• Loss of the gorge passes, such the Bloukrans pass, due to lack of public funds for road maintenance.
• Backlash from historically disadvantaged communities that have not been able to effectively break into or compete in the tourism economy of the planning domain.

11.5 Competitor analysis
The protected areas of the planning domain are not viewed as being competitive to the private sector, nor is the private sector to the protected areas in the planning domain. The role of the protected areas in the planning domain is to provide a domain in which visitors may undertake nature-based activities and receive experiences.

11.6 Marketing objectives
The marketing objectives for the Garden Route planning domain are:

**Objective 1:**
To strive to increase the length of stay of overseas visitors by one night.

**Objective 2:**
To increase the promotion and marketing of the planning domain to visitors already in the planning domain.

**Objective 3:**
To attract more activity orientated visitors into the remoter areas of the planning domain.

**Objective 4:**
To encourage more historically disadvantaged communities to utilize tourism products and resources in the planning domain.

11.7 Strategy

11.7.1 Target market
The target markets are:

**Objective 1:**
• Domestic tour operators providing packaged, scheduled, chartered and specialised tours along the Garden Route.
• Overseas tour operators, wholesalers, and travel agents in the countries where the majority of tourists in the planning domain emanate.
• Internet – as a world body.

Objective 2:
• Tour guides.
• Tour coach / microbus drivers.
• Self-drive overseas and domestic tourists.
• Domestic multi-day holidaymakers.

Objective 3:
• Outdoor enthusiasts
• Outdoor activity clubs such as hiking clubs, mountain bike clubs, bird clubs, orienteering clubs, social clubs, university societies and sports associations, high school clubs.
• Nature and travel journalists and media.

Objective 4:
• Historically disadvantaged people living in the planning domain and similar communities in Cape Town.

11.7.2 Branding strategy
The brand strategy for the Garden Route planning domain seeks to:
• Invite visitors who will respect and protect the Garden Route planning domain’s historical culture, natural environment, landscapes and tourism image.
• Develop visitor experiences that encourage lengthened stays and increased average spend.
• Develop products, infrastructure and services that deliver the brand promise.
• Develop and promote visitor experiences throughout the planning domain’s different tourism seasons.
• Develop a network of activity centres along the N2 that promote the planning domain’s brand.
• Develop a planning domain logo and marketing livery. The livery will be a key element of the brand and its look and feel will need to be reflected in other marketing materials and vice versa.

11.7.3 Product strategy
Product strategy should reflect:
• A new approach and attitude to tourism provision and service in protected areas.
• Strong emphasis on planning for sustainability and appropriateness to which preferred, selected markets need to adapt as part of the global effort of saving our planet.
• A focus on the needs and demands of existing and preferred market segments.
• The concept of tourism activity hubs that have a collaborative, complementary, multi-sectored approach to marketing and promoting tourism activities, experiences and products in its TDA and other TDAs in the planning domain.

11.7.4 Pricing strategy

Pricing strategy for the planning domain should reflect those of SANParks and Cape Nature.

11.7.5 Place strategy

The corporate marketing, advertising and promotion strategies of SANParks and Cape Nature at a corporate and Head Office level still have precedence.

A second level marketing and promotion strategy is recommended for the three primary Activity Centres recommended along the N2 and minor Activity Centres at Robberg, Goukamma, Ebb & Flow and Storms River Rest Camp.

The Internet is considered a critical “In Space” place that needs to be incorporated to the fullest extent into the place strategy for the planning domain. SANParks and Cape Nature have good quality, comprehensive, user-friendly websites that are serving the planning domain adequately, although a linkage between the two websites for the planning domain would be of assistance to visitors to the planning domain.

11.7.6 Promotional strategy

The following promotion strategy is recommended for the planning domain based on market segments:

11.7.6.1 Tour operators and tour guides

Production of a promotion booklet, website and email drop aimed specifically at tour operators (domestic and overseas) and tour guides. This publication should be written as a technical document aimed at the needs of tour operators and tour guides to assist with the planning and establishment of itineraries as well the management of tours in the planning domain. The underlying aim of publishing the booklet and website is to increase the length of stay of tour groups in the planning domain. The booklet should contain all the technical information required by tour operators / guides as well as sample 3 night itineraries which are strongly promoted.
11.7.6.2 Overseas tour operators and travel agents

Compilation of small technical document assisting tour operators and travel agents compile itineraries for tour groups and FIT self-drive tourists visiting the planning domain. The driving force of this document should be to increase the length of time that visitors spend in the planning domain. This booklet should be mailed and emailed to all tour operators currently providing tours in the planning domain. A range of sample four day / three night itineraries should be included in the document as well as a full range of technical tips for tour operators, itinerary planners and travel agents.

11.7.6.3 Domestic multi-day holidaymakers.

A purpose designed brochure-type publication should be published annually just before the ultra-high tourism season. This publication is aimed the domestic multi-day holiday market that streams into the planning domain during the ultra-high season. This publication should promote the full range of activities and experiences available for day visitors into the protected areas of the planning domain. This publication should strongly promote the multi-modal trails concepts proposed for the Central TDA. An A3-sixed poster should accompany this publication. Posters should be hung at strategic locations in supermarkets and filling stations in the planning domain that are supportive of the promotions initiative and that brochures are distributed from the supermarkets and filling stations on a regular basis during the peak tourism seasons.

11.7.6.4 Activity Centres

The three proposed activity centres for the backbone of the promotional drive of selling the planning domain. A separate detailed marketing plan should be developed for each Activity Centre, as it is a complex, multi functional initiative.

11.7.6.5 Nature-base clubs

A special webpage should be developed for this market segment promoting the activities and experiences available in the planning domain, particularly the multimodal trails.

Nature-based Outdoor activity clubs such as hiking clubs, mountain bike clubs, bird clubs, orienteering clubs, social clubs, university societies and sports associations, high school clubs.

11.7.6.6 HDI programme

A special publication should be produced for HDI living in townships and informal settlements around the urban areas of the planning domain. This publication should be distributed free of charge at café’s, filling stations and bus stations. The contents of this brochure should focus on the activities and experiences that are suitable for this market segment. The brochure should also provide tips about conducting appropriate outdoor recreation activities, what
are the rules in protected areas, acceptable behaviour, how to treat litter and emergencies. This programme should be run actively in HDI residential areas just before the ultra-high season. This programme could be supplemented by advertorials on the radio and carefully worded adverts aired on the radio.

11.7.7 Advertising strategy

The advertising strategy includes:

- Obtaining airtime on local radio and national television through advertorials and discussions about the newly proclaimed National Park and the activities available for the different sectors of the market in the Park.
- Adverts placed in November editions of national outdoor-based travel and recreation magazines, such as Get-a-way, aimed at up-country visitors and regional visitors prior to their coming to the planning domain during the high season.
- Adverts should be placed in The Weekend Argus’ lifestyle section (and Die Burger’s equivalent) just prior to long-weekends and public holidays advertising the products, activities and experiences that are available in the planning domain.

11.7.8 Market research strategy

A market research programme should be established to monitor and gather market intelligence to provide quality tourism data on which managers may make informed decisions.