

The Prevalence of Market Segmentation Research in the Tourism Industry in Africa

Hennie Visser*

*Unisa Graduate School of Business Leadership, Unisa SBL campus, Midrand, South Africa,
Email, vissejh@unisa.ac.za*

**Corresponding Author*

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Abstract

Despite the benefits that market segmentation could provide to marketers, it is uncertain to what extent market segmentation research informs decisions about marketing strategy in the tourism industry in Africa. The purpose of this paper is to appraise the incidence of market segmentation research in this context. Market segmentation is used to demarcate a broad market into smaller segments to enable the formulation of marketing strategies based on segment needs. A review of journal articles with market segmentation in the tourism industry in the African context as a focus area is provided. While research in this context is available, recommendations are made about possible market segmentation research focus areas in the tourism industry in an African context.

Keywords: Marketing strategy; market segmentation; research; tourism industry; African context

Introduction

Since market segmentation and product differentiation were proposed as alternative marketing strategies by Smith (1956), it became a much debated and researched strategic marketing management topic. An earlier analysis by Wedel and Kamakura (2002) about the state of research on market segmentation and Mahajan, Agarwal and Agarwal (2008) on the evolution in market segmentation thinking, encouraged the need for more market segmentation research. While the practical application of market segmentation theory is still argued, it is possible to divide the market in distinct groups based on shared characteristics of members of these groups. The characteristics could be based on differences in needs (McDonald & Dunbar, 2004), (Hunt, 2011), geographic dispersion, demographic characteristics or other market segmentation bases (Lamb, Hair, Joseph & McDaniel, 2012); (Schiffman & Wisenblit, 2015) and (Armstrong, Kotler & Opresnik 2017). While there are a plethora of ways to segment markets, Thoeni, Marshall and Campbell (2016) postulated that an organisations' resources and strengths will eventually dictate how a market could be segmented. In a tourism context, segments could be created on bases such as motivations (Lwoga & Maturo, 2020), behavioural intentions (Kruger, Viljoen & Saayman, 2018) and the satisfaction of leisure and religious needs (Ramukumba & Moeketsi, 2018). Based on a review of published research about market segmentation in the tourism industry in Africa, this paper provides insights to what extent marketers are informed by research that can guide their market segmentation efforts.



Focusing market segmentation research on tourism makes sense. Tourism can play an important role in the development of rural economies (Cho, Bonn & Brymer, 2014) which in turn positively impact on social, economic and political advancement of communities (UNWTO, 2015). The role that tourism plays in the development of regional economies was confirmed by Calero and Turner (2020). Products and services associated with going on holiday grow with tourism numbers (Guillet & Kucukusta, 2016). The Tourism Business Council of South Africa (2018) published a report that reflects South Africa's tourism business' performance and outlook. Opinions are sourced from lodge groups, hotels, lodges, timeshares, camping and self-catering outlets, hotel groups, bed and breakfast/guesthouse/backpacker operators as well as tour operators, coach operators, vehicle rental companies, airlines, travel agents, retail outlets, forex traders, conference venues and attractions. The diversity of industry players provide a sense of the broad spectrum of businesses that are associated with the tourism industry. This was supported by Srihadi et al., (2016) who reiterated that tourism could be an important contributor to social and economic growth. A report by the United Nations World Tourism Organisation (UNWTO, 2015) declared that tourism is one of the fastest growing and most diverse service industries in the world. The industry contributes 9% to global gross domestic product (GDP) and supports the livelihood of one out of every 11 people. In the report, it states that Africa was one of the fastest growing tourist regions. Approximately 56 million visitors contributed an estimated US\$36 billion to African economies. While these figures may seem high, it represents a modest 5% of the world tourism market and tourism is still regarded as an underdeveloped opportunity for the continent. The tourism industry's ability to attract foreign funds provides various opportunities for economic growth and improved livelihoods through job creation and security, regional economic development, improvement of infrastructure, increasing domestic consumption, export expansion, cultural and environmental preservation and empowerment of marginalised and previously disadvantaged people (UNWTO, 2015).

Two case studies are mentioned to support the sentiments expressed in the UNWTO report. Research published about the South African industry (Statistics South Africa, 2019), confirmed that the tourism sector directly employed more than 739 000 individuals in 2018, an increase of almost 8,5% from the previous year. This represents a share of 4,5% of total formal employment in the economy. Just over 15 million people visited the country in 2018, of which almost 10,4 million qualified as tourists (as opposed to one-day visitors). Foreign tourism spent was almost R120,0 million and could be split between accommodation, restaurants, transport, and other tourism related expenses. Domestic tourists spent approximately R153,2 million in 2018.

In The Gambia, the contribution of tourism to gross domestic product and employment is expected to rise to 18% and create an estimated 35 000 jobs in 2020 (Rid, Ezeuduji & Pröbstl-haider, 2014). The focus of their study was to understand the motivations for tourists to visit remote rural areas. Understanding these motivations could assist managers to customize products, services, and marketing messages for specific market segments. Stimulating growth in The Gambia's tourism industry became a necessity after the threat of subsidised groundnuts from USA suppliers increased competition. Developed countries can enforce tariffs on products but cannot place tariff barriers on leisure export goods and services. Their research revealed that there is a high potential for rural tourism, but it have to be "packaged" with the very popular sun, sea and beach products and services that currently drives tourism income to the country (Rid, Ezeuduji & Pröbstl-haider, 2014).



Methodology

To gain insights into the state of market segmentation in the tourism industry in an African context, databases were scrutinised for research published in this environment. Search terms used included: Tourism, Africa, Marketing, Market segmentation. Articles from 2010 to most recent were included for analysis. This was done to ensure that research reflects a current focus. Articles included for analysis are listed in table 1. Data credibility was ensured by using articles that could be sourced from databases available at the Unisa library. These databases cover all African based research of good standing as well as other databases in which research regarding market segmentation in tourism in an African context could occur. Articles were analysed by relying on content analysis to identify, analyse and report on themes (Vaismoradi, Turunen & Bondas, 2013).

Literature review – market segmentation

When introducing the concept of market segmentation, Smith (1956) argued that marketers should not deny the natural heterogeneity in the market and keep on promoting standard products and services to all customers. Thoeni, Marshall and Campbell (2016) define market segmentation as the process of practically dividing the market into smaller homogenous sub-markets (market segments) designed to achieve superior financial performance. Dibb and Simkin (2001) recognised that it is the most widely used marketing approach used to understand customers' needs in a diverse market. Tonks (2009) was one researcher who supported this notion when arguing that focus on specific market segments could improve customer satisfaction. Begg and Ward (2013) and McGuigan, Moyer and Harris (2017) explained that it makes sense to rely on a segmented market approach where competition is strong and specialisation provides an opportunity to deliver unique products and services by focusing on managerial and organisational strengths that differentiate a supplier from economic rivals. Dibb and Simkin (2008) stated earlier that business success relies on gaining thorough understanding of customer needs, and market segmentation enables the process because it provides an opportunity for organisations to focus on needs in those markets that are targeted.

The key to successful market segmentation lies in the ability to influence the price charged for a product or service because of differentiation created between competitors. Since market segmentation conceptualisation is anchored in economic pricing theory, the suggestion is that more profit can be achieved in market segments where pricing levels can be manipulated in favour of the organisation (Hines & Quinn, 2005); (Dibb & Simkin, 2008). Pesonen (2013) iterated that market segmentation helps organisation to gain a better understanding of needs in target segments and as such assists organisations to refine product and service offerings, create differentiation that is leveraged in getting better prices. Berndt and Boshoff (2018) added that services organisations could charge different prices for a similar service when different segments have dissimilar perceptions of value. Not contesting the value of the economic principle, Sheth (2011) proposed that the practical application of marketing, as it is known in the context of industrialised economies, should be modified for developing economies. The argument being that emerging markets function different from established markets because they are characterised by a shortage of resources, unbranded selling of consumer goods and underdeveloped infrastructure. These characteristics culminates in a system where marketers gain a competitive advantage through their ability to



improvise with the few resources that they have. The argument from Sheth (2011) suggests creating differentiation, a key component of successful market segmentation implementation.

Market segmentation research in the tourism industry

The research and application of market segmentation is generally more difficult in a services marketing setting. In part that is because services marketers accept that customers are part of the service experience and therefore service managers need to accommodate variability in the planning of services (Beltagui, Candi & Riedel, 2016). One of the service research themes identified by Victorino et al. (2018) include “Customer and employee behaviour”, acknowledging that service inseparability groups customers and employees together. A market segment may thus be part of the tourism service supplier. Further to this, destination marketers have many stakeholders who focus on many different market segments. The research of Tkaczynski, Rundle-Thiele and Beaumont (2009) focused on the similarities between the segmentation approach used by destination marketing organisations and tourism stakeholders. They disputed the widespread use of demographic bases for tourism market segmentation. The reason is that no segmentation base on its own can accurately predict market behaviour. They confirmed that the popularity of demographic segmentation is based on it being accessible and measurable and therefore will probably remain to be used as segmentation frameworks for some time. Their research concluded that agreement on market segmentation bases between destination marketers (such as Cape Town Tourism who promotes the city of Cape Town as a generic destination) and tourist stakeholders (such as hotels and restaurants catering for specific tourist needs) could result in resources allocated more productively in marketing messages, service innovation, pricing and other marketing elements (Tkaczynski, Rundle-Thiele & Beaumont, 2009). Earlier Tsai and Chiu (2004) held the opinion that segmentation which is based on general segmentation bases is easier to manage since it is more intuitive. Researchers such as Horneman et al., (2002) shared their findings of segmentation from an age group, which could be justified as a valid market segment. They found, however, that Australian tourists aged between 65 and 74 could be classified into six distinct segments based on attitude and behaviour descriptors. This made much more sense to marketing practitioners who could target specific segments with tailor made marketing value propositions that addressed needs of different segments. Research on market segmentation revealed segmentation bases such as tourists who believe going on holiday is essential to quality of life (Dolnicar, Lazarevski & Yanamandram 2013) – suggesting that mass advertising for holiday destinations is a waste of financial resources. Their research revealed segments that do not value holidays as something that adds to their quality of life, to segments that believe that travel is essential to their overall quality of life. Tourism marketers’ ability to profile the segment that places a high value on travel for quality of life, will be able to focus their marketing communication efforts on this segment only and allocate marketing budget to segments that are targeted specifically. Their research supports the use benefits and travel motivation as segmentation bases, which was described by Pesonen, (2012) in research using tourism in rural Finland as context.

Consciously moving away from demographic segmentation as the primary base, other segment bases include market preferences (Guillet & Kucukusta, 2016), lifestyle (Srihadi, Hartoyo, Sukandar & Soehadi 2016) and motivations to visit rural tourism destinations (Rid, Ezeuduji & Pröbstl-Haider 2014). Vitale et al's. (2019) analysis indicated the weakness of assuming a group of (seemingly similar) consumers as homogenous. Their focus was on wine



tourists and their analysis revealed sub-segments with different profiles in the broad segment. Each sub-segment had unique needs that could be explored by marketers in the wine industry. Attempts to draw up a profile of the wine tourism market segment (persons between the ages of 30 and 50, post school educated and middle to high income earners) failed to provide conclusive information for marketers to do strategic planning. Using a post hoc predictive technique to classify wine tourists into homogenous groups, data analysis revealed four segments. In an earlier study on wine tourists, the homogenous nature of each segment provided guidance for marketing strategy development based on different profiles and behaviours (Molina et al., 2015). Another study in the wine tourism industry revealed segments whose homogeneity were based on the financial, time and other constraints that they face when traveling. The analysis provided valuable input for marketers on the segments that could be isolated to focus on in their marketing efforts (Cho, Bonn & Brymer, 2014). Differences in motivation to visit spa destinations in Japan framed research by Kamata and Misui (2015) who identified multiple segments using cluster analysis. Understanding that spa visitors (a seemingly homogenous segment) can be segmented in sub-segments that emphasize motivations to visit a spa that fluctuated between romance, pet treatments, friendship, and sport. Different segments were associated with differences in spending patterns, making the identification of these segments important to marketers who can provide tailor made services to higher paying customers.

Marketers trying to gain a deeper understanding of specific needs in the already niche market for female groups of holidaymakers used preferences to further understand diverse needs (Khoo-Lattimore & Prayag, 2015). Through understanding differences in preferences, this seemingly homogenous market was further segmented into four distinctly heterogenous groups. The significance of this research is that it revealed that while demographic features of female groups were similar, the heterogeneity between groups could be unlocked through a deeper understanding of preferences. Marketers could easily fall for a less sophisticated segmentation profile, such as demographic features, while an in-depth analysis revealed more useful information that could be applied in marketing strategy. Using preference as a segmentation base was also the focus of research by Guillet and Kucukusta (2016) when they probed for a better understanding of market preferences in the spa tourism market in Hong Kong. Their analysis revealed four market segments, each with a unique set of homogenous traits. Using data to describe demographic features of each segment provided information to marketers to assist in selecting segments for which specific tailor-made marketing offerings could be developed. The need for more detailed segmentation insights became necessary when marketers realised that spa tourists in Hong Kong started to view spa visits as a daily necessity rather than a special indulgence – encouraging marketers to develop a more nuanced view on the features of this market (Guillet & Kucukusta, 2016). In this case, segmentation was used to provide marketers with much needed clues on innovation and brand renewal. Examples of the many iterations of data that are used to decide on segments support the early opinion of researchers such as Myers (1996) who mentioned that the number of market segmentation bases is only limited by the imagination of the marketer and/or researcher. In this regard, Tonks (2009) supported Myers when he repeated that in any given situation there might be millions of ways to segment a market.



Market segmentation research in the African tourism context

The insights gained from articles that reflect on the occurrence of market segmentation in the tourism industry in an African context are summarised in table 1.

Table 1: Summary of market segmentation research in the African context - (2010 to 2020)

Year of publication and Researcher(s)	Country to which research applies	Focus of market segmentation research	Implications
Kruger, Saayman and Strydom (2010)	South Africa	Similarities and differences between first time and repeat visitors to an arts festival.	Marketing campaigns should follow a two-pronged approach to communicate different messages to first time and repeat visitors.
Botha and Slabbert (2011)	South Africa	Segment visitors to an arts festival. Longitudinal research.	Most significant segments were identified using age. Marketing strategies should focus on the biggest segments and use differentiated messages to reach each segment.
Rogerson (2011)	South Africa	Identifying the segment for limited service hotels. Case study.	Identified a need for limited-service hotels in specific urban areas based on the needs in this niche segment.
Boekstein and Spencer (2013)	South Africa	Identifying market segments for mineral spring resorts in the Western Cape	Identify a segment with a need for medical and wellness specifically which can be targeted.
Tichaawa and Harilal (2016)	South Africa	Segmenting the market for golf spectators	Identify sport tourist characteristics (for golf spectators specifically). Event's organisers can use the information for target marketing.
Kruger and Saayman (2016b)	South Africa	Segmenting the market for cricket spectators at a specific event	Different segments were identified based on what spectators find entertaining.
Botha, Saayman and Kruger (2016)	South Africa	Used the expected interpretation services to segment visitors to the Kruger National Park	Different segments were identified using the expected interpretation variable.
Kruger and Saayman (2016a)	South Africa	Used expenditure-based segmentation as variable to segment visitors to a youth festival	Different segments were identified using spending patterns. Youth tend to spend a high percentage of available income on something like a youth festival.
Kruger, Viljoen and Saayman (2016)	South Africa	Segmenting visitors to the Kruger National Park	Distinctly different segments were identified based demographic characteristics and on different needs.
Amuquandoh (2017)	Ghana	Identify motivations of visitors to a specific national park	Four distinct segments are identified. Marketers can use this information for targeted communication.
Bruwer, Roediger and Herbst (2017)	South Africa	Determine different lifestyle-related (psychographic) wine market segments using a domain specific research instrument	Five cross-culture wine segments were identified, moving away from a crude demographic segmentation based on race only.
Kruger and Metsi (2017)	South Africa	Identifying different segments to a festival based on spending	Three market segments were identified based on spending. Festival organisers can use this information for targeted communication.
Nduna and Van Zyl (2017)	South Africa	To identify different market segments for visitors to Mpumalanga province	Identified two distinctly different market segments who visits the same province based on benefits sought.
Kruger and Saayman, (2017)	South Africa	To determine if music festival attendance leads to other intangible benefits for festival goers	Market segments could be formulated using post-festival consumer behaviour.
Kruger and Snyman (2017)	South Africa	Segmenting visitors from Latin America to South Africa	Four viable segments were identified, and marketing strategies were proposed for each segment.
Viljoen, Kruger and Saayman (2017)	South Africa	To identify segments to a cheese festival	Three distinct segments were identified based on different motivational factors.
Muzeza, Hermann and Khunou (2018)	South Africa	Exploring visitor motivational profiles of visitors to a provincial nature reserve	Segmentation by motivation is a useful market segmentation instrument.
Carlos Martin, Saayman and du Plessis (2019)	South Africa	Determining satisfaction of overseas tourists to South Africa	Tourism satisfaction differs for different segments. Differential marketing strategies for segments are suggested.
Woyo and Woyo (2019)	Zimbabwe	Investigates cultural tourism as alternatives for wildlife tourism for tourist visiting	Insights gained to develop this special segment as a tourist alternative for visitors



		Zimbabwe	from abroad.
Lwoga and Maturu (2020)	Tanzania	Identification of market segments based on motivation for tourists to rural Tanzania	Different market segments are verified based on motivation.
Kruger (2020)	South Africa	Market segment needs for arts festival visitors	Different needs for different segments were identified using motivation as a segmentation base.

An analysis of the published research on market segmentation in an African context suggests the following tendencies. Research focuses predominantly on the South African context. From the list in table 1, most research focus on case studies from South Africa. Many other well-known African tourism destinations does not reflect research regarding market segmentation. Most research focus on single events which tourists specifically visit. Insights reflect arts festivals, specific sports events, or specific nature reserves. Although it is acknowledged that segmentation can occur on these levels, the application of this knowledge could only be used to the units of analysis, which are event visitors. Research tends to focus on local tourists and their needs regarding specific events of specific tourism niche needs, such as sport and cultural events and rural tourism. If tourism marketers in the African setting want to understand and attract market share from a continental perspective, it is important to understand tourism needs from a broader international viewpoint. Research confirmed that there are different market segments within a seemingly homogenous segment. For instance, a few the researchers found that visitors to specific events or areas (seemingly a single market segment), could be segmented further by applying deeper insights. This is significant for marketers who wishes to communicate specific aspects of these events to attract more visitors. For example, Woyo and Woyo (2019) found that there are other needs amongst visitors to Zimbabwe than seeing wildlife. Targeting this segment with a distinct message that address the needs of culture and heritage tourists could reveal new opportunities to explore. A focus on one broad market segment often enabled more refined segmentation based on insights regarding preferences and behaviour. In this regard, research shared by Amuquandoh (2017) revealed that visitors to a national park (seemingly one distinct market segment) could be segmented further into needs which varies between social interaction to adventure. The analysis also indicated the most lucrative segments, which is valuable information for tourism marketers.

Conclusion and some recommendations

Research about the application of market segmentation in the African tourism context is available. While there are more than 50 recognised countries on the continent, research does not reflect countries known for their tourist attractions, such as Kenya, Tanzania, Madagascar, Ethiopia, and other well-known African tourist destinations. It is therefore suggested that more research is needed that provide insights to market segmentation and market segment needs for tourists to Africa. Researchers are encouraged to contemplate the following broad topics for further research. More research from tourism markets from African countries outside of South Africa. While Africa boasts a variety of well-known tourism countries, research from South African perspective dominates. Research that understands the role of different stakeholders in the tourism industry value chain. Such research will facilitate the understanding of market segment needs amongst all role players. Research that attempts to understand market potential from different market segments. An understanding of market potential will provide guidance to the economy of resource appropriation to specific target markets. Research that understands the deeper needs of



seemingly similar groups of holidaymakers, such as nature lovers or event attendants. Research often reveals more market segments in a seemingly homogenous segment. As such, more research could provide insights into market segmentation that will aid marketers of tourism to allocate resources more productively. Knowing which lucrative or niche segments to target and what messages to use to reach the hearts and the minds these tourists could go a long way in reduce wasteful expenditure on marketing campaigns.

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