

**MARKETING FRESH VENISON IN THE EASTERN
CAPE PROVINCE
USING A NICHE MARKETING STRATEGY**

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DECLARATION

I, Gregory Simon Bull, hereby declare that:

- the work contained in this dissertation is my own original work;
- all sources used and referenced have been properly documented and recognised; and
- this dissertation has not been previously submitted in either full or partial fulfilment of the requirements for an equivalent or higher qualification at any other recognised educational institution.

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January 2003

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SUMMARY

There is a need in the Eastern Cape Province to expand the market for fresh venison. This need is due in part to fluctuations in the export market and fragmentation of consumption in the food industry, which has led to an increased demand for specialised and customised products. A suitable method for addressing these issues and successfully marketing fresh venison in the Eastern Cape Province was required, and based on the findings of this study, niche marketing was found to be a possible marketing method to explore.

This study evaluated how a strategy of niche marketing could be used to market fresh venison within the Eastern Cape Province. By analysing this main problem the research attempted to identify and understand the challenges of marketing fresh venison to the final consumer in the Eastern Cape Province and to determine whether niche marketing would be a viable option when taking into account venison's unique characteristics. Niche marketing was characterised and discussed in the light of other marketing approaches and the most important elements of a successful niche marketing strategy were highlighted. The information resulting from scrutiny of all of these sub-problems was then used to address the challenge of marketing fresh venison to the final consumer.

In-depth interviews were deemed most suitable for this study based on the nature of the topic and the depth of expertise of qualified personnel in the Eastern Cape Province fresh venison industry. Consequently, four interviews were conducted with experts in the field.

Using the niche marketing concept and the strategy that drives it, namely differentiation, possible niche markets were identified. A strategy of multiple niching was adopted to address the differentiation opportunities available, based on the relevant specialist roles of fresh venison. These differentiation opportunities in turn lead to competitive advantage. Possible niche target markets identified and analysed included the tourist market, travellers (foreign and local) by air and sea, the organic aware market and the pet food market. Branding was found to be an integral element for the niche marketing of venison and is also discussed.

The main problems hindering fresh venison marketing in the Eastern Cape Province were found to be consumers' lack of knowledge of venison, cultural differences and consumer preferences, lack of a formal infrastructure and control, and a lack of accurate data. These challenges need to be addressed before fresh venison can be successfully marketed in the Eastern Cape

Province. Research needs to be conducted on the venison industry and formal supply chains and control channels need to be implemented before a quality product in substantial and consistent quantities can be successfully marketed to the final consumer. Consumers and industry personnel must be educated about venison and its merits, and fresh venison must initially target white tablecloth restaurants and specialised delicatessens, where service is as important as the product itself.

KEY WORDS

Branding

Differentiation

Niche marketing

Organic

Relationship marketing

Specialisation

Targeting

Venison

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CHAPTER 1

NATURE AND SCOPE OF RESEARCH

1.1 INTRODUCTION AND BACKGROUND TO THE STUDY

Venison is a wild game meat product, which, in South Africa, comes predominantly from animals such as springbuck, kudu, and impala. It is unconventional in that it does not form part of the traditional meats such as beef, pork and lamb.

Venison is a unique meat with a low-fat content. It is therefore perceived as dry, but at the same time also a healthy alternative to other red meats. Venison is the leanest red meat and compares very favourably even with chicken (Elliot, 1993, p.26-29). It is also high in protein and would be ideal for low cholesterol and other health diets (Nel, 1989, p.18).

The local venison market has become important, as the value of game ranching has become overly dependant on corporate hunting and revenue from trophies. “The industry will need a thriving venison sector if it is to establish a better balance and greater sustainability” (Bezuidenhout, 2000, p.58). There is a need to expand the local market in particular, due to fluctuations in the export market.

Bezuidenhout (2000, pp.58-60) maintains that despite the need to market venison in the Eastern Cape Province, there is very little hope of competing in the conventional meat market on a kilogram for kilogram basis. Venison is a good, healthy, versatile meal, but even if housewives want it, it isn't readily available. This point emphasises the need for a regular supply of venison to outlets which would process the meat, thereby adding value to it.

Kinsey (in Tamagnini & Tregear, 1998) states that the fragmentation of consumption in the food industry has led to an increased consumer demand for specialised and customised products. Venison could be such a product. Furthermore, marketing a specialised and customised product affords firms that are unable to compete in the market an opportunity to develop a successful niche by identifying a need and then focusing their resources and energies on meeting that need better than anyone else (Garda, in Kotler & Cox, 1988, pp.241-250). According to Hooley, Saunders and Piercy (1998, p.346), market niches strategies which focus on a limited sector of the total market make particular sense for small and medium-sized companies operating in markets that are dominated by larger operators. In the case of the meat industry, smaller markets such as the venison market can successfully compete with established markets for products such as beef.

Based on the foregoing discussion, it is clear that a suitable means of marketing fresh venison is required. Considering the characteristics of venison and its position in the market, it seems that niche marketing could be a desirable avenue.

1.2 PROBLEM STATEMENT AND SUB-PROBLEMS

Bearing the background in mind, the main research problem can be formulated as follows:

How can a strategy of niche marketing be used in the marketing of fresh venison within the Eastern Cape Province?

1.2.1 Sub-problems

By thoroughly analysing the main research problem the following sub-problems were formulated:

- What are the challenges of marketing fresh venison to the final consumer of the Eastern Cape Province?
- Would niche marketing be a viable option when taking into account the unique characteristics of fresh venison?

- What is niche marketing and how does it differ from other marketing approaches?
- What are the most important elements of a successful niche marketing strategy?
- How can the information resulting from the foregoing sub-problems be applied to addressing the challenges of marketing fresh venison to the final consumer?

1.3 DELIMITATION OF THE RESEARCH

It is necessary to delimit the research in order to focus it and give it clear direction, and to establish the exact boundaries of the research problem. Malhotra (1993, p.34) states that research can only be conducted properly when it has been adequately defined.

This study only focuses on fresh venison sold to the final consumer. This includes fresh venison in its various forms. It excludes any other derivations such as the dry venison product range, consisting of items such as biltong. The focus is not on the sale of venison to intermediaries, but on its sale to the final consumer via retail outlets.

Geographically, this research focuses on the Eastern Cape Province, which includes the districts of Uitenhage, Grahamstown, Fort Beaufort, Somerset East, Cradock, Willowmore, Jansenville,

Steytlerville and Graaff-Reinet. This area was chosen since extensive stock farming is its predominant agricultural activity. However, conventional stock production in this region is regularly affected by drought. This necessitates the feeding of livestock which causes a severe strain on farm finances and may result in an increase in debt. As the Eastern Cape Province is ideally suited to game farming, venison production and marketing can possibly become an option in sustaining economic development in the agricultural sector of this region.

Despite the research being focused on the Eastern Cape Province, it is expected that the niche marketing strategies resulting from the study would be equally applicable to other regions in South Africa.

1.4 DEFINITION OF CONCEPTS

The terms defined below are pertinent to the study.

1.4.1 Niche market

Kotler (1997, p.251) defines a niche as a “narrowly defined group, typically a small market whose needs are not being well served”. This group has a “distinctive set of traits [that] may suit a special combination of benefits”.

1.4.2 Niche marketing strategy

Boyd and Walker (1990, p.326) define a niche marketing strategy as one “which involves serving one or more segments that – while not the largest – consist of substantial numbers of customers seeking somewhat specialised benefits from the product or service”. Murray and O’Driscoll (1996, p.207) view a niche marketing strategy as the selection of a particular market segment, which represents “the best opportunity for the company to serve customers well and build a defensible competitive position against new entrants”. According to Boyd and Walker (1990, p.326) such a strategy is designed to “avoid direct competition with larger firms that are pursuing the bigger segments”.

1.4.3 Market segmentation

Shani and Chalsani (1993, p.58-66) define market segmentation as “the process of breaking a large market into smaller and more manageable sub markets. The objective is to identify homogenous sub markets which are significantly different from one another.” Weinstein (1994, p.2) maintains that these sub markets consist of “groups of potential customers with similar needs and/or characteristics who are likely to exhibit similar purchase behaviour.”

1.4.4 Mass marketing

Mass marketing, also referred to as undifferentiated marketing, involves “ignoring any segments that may exist and addressing the total market with one marketing strategy”. (Murray & O’Driscoll, 1996, p.206). Hooley et al. (1998, p.315) propose that one standard product or service is supplied to satisfy all customers. Kotler (1997, p.250) supports this view and maintains that in mass marketing “a seller engages in the mass production, mass distribution, and mass promotion of one product for all buyers”.

1.4.5 Differentiation

Differentiation is “the act of designing a set of meaningful differences to distinguish the company’s offering from competitors’ offerings” (Kotler, 2000, p.282). It thus entails “creating something that is seen as unique in the market” (Hooley et al., 1998, p.46).

Phillips (in Tamagnini & Tregear, 1998) states that “by differentiating products and targeting specific consumer groups... producers can take advantage of market opportunities”. Differentiation thus leads to a competitive advantage as it creates a better positioning for your product over your competitors’ (Dalgic & Leeuw, 1994, pp.39-45).

1.4.6 Venison

Ambiguity exists in the definition of venison, and what the term encompasses. There seems to be a view that the term venison is a collective term for all wild game that can be hunted. It would seem that this confusion originates from the definition of the term 'venison' which, in the Concise Oxford Dictionary (1995), is described as "from *venari* [from the Latin] 'to hunt'". The ambiguity may, therefore, result from the thinking that venison is *anything* that can be hunted.

The Concise Oxford Dictionary (1995) also defines venison as "deer's flesh as food". A deer is any "ruminant quadruped noted for speed, the male usually with deciduous branching horns". Antelopes are "deerlike ruminants" found mainly in Africa, such as kudu and impala.

For the purpose of this study venison is meant to be the flesh of antelope, which includes the meat from kudu, impala, duiker, springbuck and blesbuck. It is a facet of wild game and should not be confused as reference to all wild game.

1.4.7 Organic

A term that is associated with food to a greater degree now than in the past is *organic*, which can be defined as “produced or involving production without the use of chemical fertiliser, pesticides, etc.” (Concise Oxford Dictionary, 1995).

1.5 ASSUMPTIONS

Only one assumption was made in the context of this study. It is assumed that no disease will affect the venison industry during the course of this research. An outbreak of a disease such as foot-and-mouth or mad-cow disease, for example, could severely curtail the market demand for venison. Other problems which could result from such an epidemic include a decrease in the quality of the product, supply problems, and a detrimental and possible irreparable effect on the reputation of venison. The researcher therefore assumes that such a scenario will not occur.

1.6 REVIEW OF RELATED LITERATURE

Despite the apparent importance of niche marketing, limited research has been focused on the subject (Dalgic & Leeuw, 1994, pp.39-45). Database searches resulted in the identification of only one thesis (Tamagnini, 1996) dealing specifically with niche

marketing applied to meat products. This study focused on the opportunities for Portuguese speciality delicatessen meats in the United Kingdom. The findings of this study indicated an increased demand for specialty delicatessen meats, predominantly through delicatessen shops. Another interesting finding was that the success of specialty delicatessen meat products in the United Kingdom was heavily dependent on establishing a close and friendly relationship with customers and providing advice, information and promotion of products.

The researcher also located a paper based on research into the venison and bison meat market in Canada conducted by the Marketing Development Branch of the Saskatchewan Agriculture and Food Association (Venison and Bison Meat Market – An overview, 1993). An important finding of this research was that the increasing preference of Canadian consumers towards reducing the amount of fat in their diet has led to an increased interest in game meat. Bison meat is a low fat, low cholesterol, alternative meat which has nutritional benefits over beef and pork. Chefs are also showing an increased interest in serving game meat as it offers a healthy alternative to traditional meats.

Galtee Deer Care sells a product branded as “Irish gold Venison”, which is derived from reindeer. An article downloaded from the Internet (Galtee Deer Care, 1998) states that venison’s high

protein/low calorie ratio is the best of any meat and is far lower in cholesterol than other meat, fish or fowl. It also has less fat than any red meat, turkey, chicken and most fish, thus allowing scope for increased market share of venison. The article adds that the market for venison in Europe is expanding and could be supplemented using niche marketing.

An article titled “Development of Niche European Venison Markets” (Tuckwell, 2000) dealt with the Australian deer market. A core recommendation was that the long-term development of Australian venison’s existing and future international and domestic market share is dependent upon the continued development of consumer confidences in the industry and providing consumers with quality assured products that meet strict quality/supply specifications.

Bastian and Menkhaus (1997) produced an article entitled “Niche Marketing Considerations: Beef as a Case Example”. This article dealt with identifying different niche marketing opportunities for beef based on the differentiation of the elements of the marketing mix, namely, product, price, promotion and distribution. An important finding was that the elements of product and service are important if customers are to buy a product. Another consideration of this article was the importance of providing a consistent quality and supply of beef. The reasoning behind this is that once consumers become repeat buyers of, for example, high quality beef steaks,

they want the same quality, as well as being able to purchase it as and when they desire.

Despite the above-mentioned research, very little is known about marketing fresh venison to the South African consumer. It is believed that this study will help fill the gap.

1.7 METHODOLOGY

An integrated approach was followed in this study. A comprehensive literature study was conducted and analysed in light of the practical implications associated with the fresh venison industry in the Eastern Cape Province. This research served to:

- establish what challenges exist with regards the Eastern Cape Province fresh venison industry, and identify pertinent problems of marketing fresh venison to the final consumer;
- ascertain whether niche marketing would be a viable option of marketing fresh venison considering its unique nature and characteristics;
- give a thorough understanding of the concept of niche marketing, and illustrate how niche marketing differs from mass marketing and market segmentation;

- illustrate the most important elements of a successful niche marketing strategy, and to analyse the concept of differentiation and how this process can be implemented; and
- address the challenges of marketing fresh venison to the final consumer by application of the foregoing information – a result of addressing the sub-problems of this study.

The empirical study consisted of personal in-depth interviews conducted with relevant stakeholders within the venison industry. These stakeholders consisted of experts in the venison industry, and included a food engineer, the former chairperson of the SA Game Ranchers' Organisation, a director of a venison/ostrich abattoir and deli, and the previous owner of a frozen food wholesaler that sells venison products. These interviews provided perspectives on existing competitors and products in the fresh venison market, established challenges to the Eastern Cape Province fresh venison sector, and aided the researcher in identifying niche marketing opportunities.

A more detailed description of the methodology, a justification for the methods followed, and a discussion of the problems experienced in the research are provided in chapter 2.

1.8 SIGNIFICANCE OF THE RESEARCH

Bezuidenhout (2000, p.58) states that there is a need to expand the local market for venison and provide established outlets with a regular supply of venison. No formal research into venison as an Eastern Cape Province niche market has been conducted. It is expected that this research will significantly contribute to the potential success of marketers of venison. Since niche marketing is an effective method of avoiding confrontation with large competitors (Jain, 1981, p.235), the knowledge resulting from this research could assist producers of venison in catering to the specifically defined interests of a unique market segment. "By differentiating products and targeting specific consumer groups, small producers can take advantage of marketing opportunities that larger companies may be unwilling or unable to satisfy" (Phillips, in Tamagnini & Tregear, 1998). It is expected that this study will highlight these opportunities.

1.9 OUTLINE OF THE STUDY

This chapter gave a background to the study and identified the main and sub-problems to the research. The methodology chapter that follows, chapter 2, describes the methodology used based on addressing these problems and sub-problems. Chapter 3 deals with the challenges to the Eastern Cape Province fresh venison

market, and the main problems are highlighted accordingly. The next chapter, chapter 4, addresses the concept of niche marketing while chapter 5 analyses differentiation as a key element of niche marketing. Chapter 6 identifies possible niche market opportunities based on the information contained in the previous chapters, and the final chapter, chapter 7, concludes the findings of the study and derives recommendations.

CHAPTER 2

RESEARCH DESIGN AND METHODOLOGY

2.1 INTRODUCTION

“Marketing research is the function which links the consumer, customer, and public to the marketer through information” (Bennett, 1995). This information is used to identify and define marketing opportunities and problems, generate and evaluate marketing actions, monitor marketing performance, and improve the understanding of marketing as a process. The prime objective of the research conducted on the Eastern Cape Province fresh venison industry was to classify the problems associated with this industry, as well as to identify and define marketing opportunities.

This chapter explains the methodology used in this research, as well as the motivation behind its choice. The various research designs, methods and techniques will be analysed, with particular focus on their essential similarities and differences.

This chapter (like all of the others that follow) takes on an integrated approach where theoretical information is discussed and analysed in the light of the practical implications associated with the fresh venison industry in the Eastern Cape Province. This approach is

necessary because the theoretical aspects of the study are interlinked. Information acquired from all aspects of the study, including desk and empirical research, is incorporated together rather than distinguishing the empirical findings from the theory.

2.2 THE RESEARCH DESIGN

2.2.1 Categories of the research design

Baines and Chansarkar (2002, p.5) distinguish three major categories of research design, namely, exploratory, descriptive and causal. These three categories, which are briefly discussed below, specify the procedure for collecting and analysing the data necessary to describe a problem.

2.2.1.1 Exploratory research

An exploratory research design involves discovering the general nature of a problem and those variables that relate to it to identify relationships among the variables and establish hypotheses (Baines & Chansarkar, 2002, p.5; Chakrapani, 2000, p.103). Baines and Chansarkar (2002, p.5) indicate that exploratory research generally tends to be qualitative in nature and uses primary techniques such as focus groups and in-depth interviews. This type of research also uses secondary data, non-probability

(subjective) samples, case analysis and subjective evaluation of resultant data. Essentially, exploratory research is carried out to investigate the basic foundations of a research problem and is often undertaken in areas in which organisations, individuals or industries have little or no experience.

For the purpose of this study, exploratory research was conducted since little research had been carried out on the topic of venison, and due to the nature of the problems that affect the Eastern Cape Province's fresh venison industry. Furthermore, possible niche market opportunities for venison needed to be identified. Since the researcher had very little knowledge of venison, and since the industry is in a developmental stage in the Eastern Cape Province, it was necessary to rely on the knowledge of experts in the field. In-depth interviews were conducted in this regard. An integrated approach of research was employed to analyse findings, whereby concepts were viewed theoretically and from a practical perspective, and as such primary and secondary data were utilised concurrently to draw conclusions and make recommendations.

2.2.1.2 Descriptive research

Descriptive research, in contrast to exploratory research focuses on the accurate description of the variables under consideration and is

quantitative in nature (Baines & Chansarkar, 2002, p.5). It includes the use of questionnaires and surveys.

The main objective of descriptive research is to provide a definitive answer to a marketing research question. This type of research often uses advanced statistical methods to measure relationships between variables. In terms of the objectives of this study, and the problems associated with the venison industry of the Eastern Cape Province, this type of research design would not have been a feasible option until conducting exploratory research to properly focus research questions on specific variables in the industry.

2.2.1.3 Causal research

Causal research attempts to establish the nature of relationships between two or more variables under investigation; for example, measuring advertising effectiveness in terms of sales or attitude changes (Baines & Chansarkar, 2002, p.5).

Although descriptive research can show that two variables are related (Aaker & Day, 1990, p.63), causal research calls for specific proof that one variable preceded the other and that no other causal factors accounted for the relationship. Baines and Chansarkar (2002, p.23) conclude that causal research typically attempts to explain why things happen, highlighting cause-and-effect

relationships in order to determine the correlation between variables. Causal research uses an experimental research design, which attempts to determine whether one or more variables influence another variable. Since causal research simply takes descriptive research one step further, and in terms of the objectives of this study, this form of research design was not deemed to be a feasible option.

2.2.2 Unit of analysis

Aaker and Day (1990, p.353) argue that it is important to distinguish between the population and the sampling frame, the sampling frame being a list of population members used to obtain a sample. Martins, Loubser and Van Wyk (1996, p.251) define a sample unit (referred to as a sampling frame by Aaker and Day) as the unit available for selection at some stage of the sampling process. Sekaran (2000, p. 134) refers to the sample frame or sample unit as a unit of analysis. This unit can take the form of individuals, groups, organisations and cultures.

The choice of respondents was an important criteria for the study since there is limited expertise in the Eastern Cape Province retail venison sector. The selected respondents were four *individuals* who are experts and have suitable experience in the Eastern Cape Province venison industry. The researcher was confident that

sufficient information would be obtained from these four interviews. Baines and Chansarkar (2002, p.73) add the voice that usually, required information can be gathered using a small set of in-depth interviews. The interview sample consisted of Mr. Charl de Villiers (with input from John Westcott), both of whom are directors of Westvill Game (Pty) Ltd (an ostrich and game abattoir and deli), Mr. Dave Morton, the previous owner of Morton's Frozen Food Wholesalers, Mr. Frantz Wild, a food engineer who formerly worked for Heydenrych's Meat Processors and Mr. Andrew Conroy, the former chairperson of the SA Game Ranchers' Organisation. Respondents were assured full anonymity and as such are not quoted or identified directly throughout the study.

2.3 METHODS OF RESEARCH

Chakrapani (2000, p.106) notes that there are many different methods to collect market research data: some methods are qualitative (such as in-depth interviews or focus groups) while others are quantitative (observation and surveys). The choice facing the researcher at the outset of a research project is between using qualitative or quantitative research methods (Baines & Chansarkar, 2002, p.23). There are important differences between these types of research methods, and these are discussed in the sub-sections that follow.

Quantitative research methods are designed to elicit responses to predetermined, standardised questions from a large number of respondents. This involves collecting relatively small amounts of information from a large number of people and then quantifying the results into percentages and descriptive statistics. The main quantitative methods are observation, surveys and experiments (Baines & Chansarkar, 2002, p.23).

Qualitative research methods are quite different from quantitative methods and are often used at the preliminary stages of a research project to identify the basic factors affecting a problem, and to attempt to uncover underlying motivations, attitudes, opinions, perceptions and behaviours of a small number of respondents. The emphasis is on obtaining rich, detailed information from a small group of people rather than short, specific answers from a large number of respondents, as is the case with quantitative surveys. Qualitative methods are unstructured and while basic guidelines are used to focus the research, there is no structured set of questions for respondents (Baines & Chansarkar, 2002, p.24).

The essential differences between qualitative and quantitative research methods are summarised in Table 2.1.

Table 2.1 Characteristics of qualitative and quantitative research methods

Qualitative methods	Quantitative methods
Used to identify and understand underlying motivations, attitudes, opinions, perceptions and behaviours	Used to generalise the results of a sample to a population
Involve a small number of respondents	Involve a large number of respondents
Used to obtain rich, in-depth information	Used to obtain narrowly defined descriptive information
Use an unstructured questioning approach, often using open questions	Use a structured questioning process, often using multiple fixed-response questions
Make use of non-statistical (content) analysis	Make use of descriptive statistics, percentages, proportions, hypothesis tests

Source: Adapted from Baines, Chansarker and Ryan (in Baines & Chansarkar, 2002, p.63)

Qualitative approaches are frequently used where an exploratory research design is being employed, whereas quantitative research designs are used where the research design is conclusive (Baines & Chansarkar, 2002, p.64).

Qualitative research is a growing part of the marketing research field and has become increasingly valued over the last decade (Baines & Chansarkar, 2002, p.63). An analysis of the distinctive characteristics of qualitative research as put forward by Baines and Chansarkar (2002, p.63) underscores the need for a qualitative approach since the present research:

- was based on small samples of people (only four experts in the Eastern Cape Province venison sector were interviewed);
- was not meant to be representative of larger populations, but sought to understand consumer behaviour, motivations, opinions and attitudes, and delve into the knowledge of the venison experts interviewed;
- was aimed at producing in-depth data as to date little research has been conducted on the venison industry;
- called for unstructured data-collection methods, such as interviews which could be guided by semi-structured objectives, and moulded according to respondent knowledge;
- required a high degree of interpretation by the researcher; and
- could be followed by quantitative research to test the generalisability of any findings put forward by the researcher.

2.4 COLLECTION OF DATA

This section justifies the choice of data collection method used in this research.

Baines and Chansarkar (2002, p.25) contend that on deciding on the research plan, a distinction needs to be drawn between whether to collect primary or secondary data. *Primary* research refers to research that has not previously been carried out and involves the collection of data specifically for a particular project. *Secondary*

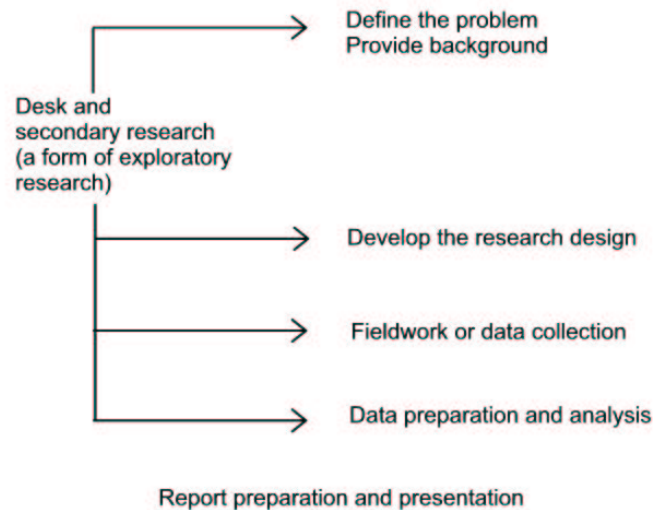
research (sometimes referred to as desk research) involves gaining access to the results or outcomes of previous research projects. This is a useful method that can provide answers to some of the researcher's own research problem and sub-problems.

Most research projects involve a combination of secondary and primary research. Marketing research projects often begin with a desk research phase in which associated information is gathered before the researcher sets about designing his or her primary research data collection instruments.

2.4.1 Collecting secondary data

Baines and Chansarkar (2002, p.44) note that secondary data collection and analysis are important at all stages of the marketing research process (as shown in Figure 2.1), and that secondary information is particularly useful in the problem definition and exploratory stages.

Figure 2.1 Desk research in the marketing research process



Source: Adapted from Baines & Chansarkar (2002, p.44)

Desk research was used to provide a background to the problem of identifying and defining niche marketing opportunities for fresh venison in the Eastern Cape Province. A comprehensive review of related research was reported on in chapter 1, section 1.6. Throughout this study, the findings resulting from secondary research were compared and integrated with the primary findings resulting from the in-depth interviews.

2.4.2 Collecting primary data

Baines and Chansarkar (2002, p.66) acknowledge that the most popular methods used for collecting primary data in qualitative

research are focus groups, in-depth interviews, projective techniques and observation methods. These are also the four qualitative research methods used most often in marketing research. Table 2.2 below highlights the advantages and disadvantages of each of these techniques.

Table 2.2 Advantages and disadvantages of different qualitative research techniques

Technique	Advantages	Disadvantages
Focus group	Offers the researcher a good understanding of the research problem Is useful for gaining insights into sample	It is difficult to probe individual respondents
In-depth interview	Allows detailed exploration of the research problem Is a good technique to use for gaining insights into specific populations	Is dependent on the skills of the interviewer
Projective techniques	Are highly useful for obtaining subconscious and sensitive information	A high degree of interpretation bias could occur
Observation	Provides understanding of behaviour Data is generalisable	Does not provide an understanding of reasons for behaviour Can be costly

Source: Adapted from Baines and Chansarkar (2002, p.67)

A brief overview of each of these four qualitative methods based on the views of Baines and Chansarkar (2002, p.67), is given below.

A *focus group* is an informal discussion conducted with approximately eight to twelve people who are convened by a

business or a research agency to discuss some aspect of marketing.

Projective techniques use indirect forms of questioning, which allow respondents to project their attitudes and feelings to a third party. These techniques are most useful when examining issues with which the respondent does not feel at ease.

In *observation studies* the researcher observes the behaviour of consumers. Observation methods are widely used in organisational research to examine how people behave in groups, in teams and as organisational members.

In-depth interviews were employed to obtain the empirical data for this study, and are therefore discussed in more detail.

2.4.2.1 In-depth interviews

Chakrapani (2000, p.106) indicates that an in-depth interview broadly involves open discussion between interviewer and respondent. Baines and Chansarkar (2002, p.72) point out that the word *interview* is derived from the French 'entrevue' and literally means to see inside. An interview is thus concerned with gaining insights and determining meaning from an interactional relationship between interviewer and interviewee.

A number of advantages and disadvantages may result from using the in-depth interviewing method. The major advantages of this method are listed below. The in-depth interviews conducted:

- allowed a detailed exploration of the research problem, as well as problems facing the industry. The Eastern Cape Province venison industry is still in a developmental stage, and there seems to be rather few acknowledged experts involved in the local marketing of venison in the Eastern Cape Province. It was difficult to find qualified personnel with a depth of expertise who could bring relevant and accurate information to this study;
- allowed the researcher to gain insights into potential niche markets for fresh venison;
- meant that there was no peer pressure from other respondents since the researcher and the respective respondents were alone during the interviews. Respondents could therefore freely express thoughts in a non-competitive environment;
- allowed more time to obtain detailed information since all of the interviews lasted over one hour;
- took place at the offices or homes of the respective respondents, which made the interview situation more comfortable;
- aided the research process since respondents were comfortable with the one-on-one situation and could speak openly and

honestly about the Eastern Cape Province fresh venison sector;
and

- due to the informal nature of the interviews, allowed moulding of the respective interviews according to the particular discussion.

The disadvantages associated with the conducted in-depth interviews are highlighted below. These interviews:

- had no group interaction and therefore stimulation for new ideas from the respondents had to come from the researcher only. Respondent thinking was therefore not challenged as much as would be possible in a focus group;
- were lengthy, and the resulting information took a longer time to transcribe, correlate and analyse than would be the case using other data collection approaches; and
- having been over two hours long (on two of the four interview meetings), made it difficult to project the results into a structured analysis.

The advantages of the in-depth interview, however, outweigh the disadvantages, and this method of data collection was found to be appropriate for addressing the research problems and objectives.

2.4.2.2 Data collection technique

There are numerous data collection techniques used in in-depth interviews, the most common ones being laddering, hidden-issue questioning and symbolic analysis (Baines & Chansarkar, 2002, p.72).

Laddering is a method where questioning proceeds from product characteristics to user characteristics, while *hidden-issue questioning* attempts to uncover deeply personal opinions. *Symbolic analysis* is a technique used to determine the symbolic meaning of products or services by asking respondents what they would do if they could no longer use that product or service.

For this study another interviewing technique, the *funnel technique* (Baines & Chansarkar, 2002, p.72), was used. In this technique a discussion at the broadest level possible is conducted initially and slowly funnelled down. This technique was used in all four interviews.

Prior to conducting the in-depth interviews, the researcher had an informal meeting with one of the respondents, Mr. Charl de Villiers (one of the directors of Westvill Game (Pty) Ltd), to obtain a fuller picture of venison, the product and the industry. This informal meeting was used to create a semi-structured moderator guide

(please see Annexure A), which would be utilised for the in-depth interviews that were to be conducted. In essence this initial meeting was an *experience survey*, which helped to formulate the research problem of this study, to clarify concepts and to provide the researcher with a more detailed knowledge of the area of research interest (Baines & Chansarkar, 2002, p.65).

The semi-structured moderator guide, which was constructed by the researcher after the experience survey, was used to keep control of the interviews conducted with the respondents as there were certain issues and topics which needed to be covered. These included uncovering problems to the industry, identification of possible venison target markets, methods to control the market and ways to popularise venison.

All interviews were tape-recorded using a dictaphone so that no information was lost. The recorded findings were subsequently transcribed manually. The findings were then analysed and incorporated with the secondary research.

2.5 RESEARCH PROBLEMS ENCOUNTERED

During the course of this study certain problems were encountered (discussed in the subsequent section).

Firstly, very limited literature focusing on South African venison (buck as opposed to deer) could be found, and as a result the majority of the theoretical findings had to be applied to South African venison. No prior studies on the niche marketing of venison in the Eastern Cape Province, or South Africa, had been conducted and this required all research on this topic to be totally original, which proved to be a challenging exercise. In addition, all of the theoretical concepts discussed throughout this study, including segmentation, differentiation, competitive advantage and positioning are very closely related and interlinked; consequently it was very difficult to structure the study so that there was a logical flow of ideas.

As a secondary method of research, the author constructed a quantitative questionnaire and two hundred copies were issued to a contact in Johannesburg. This person assured the researcher that two hundred respondents would be attending a 'venison conference' and that he would personally get every attendee to fill in a questionnaire. The contact was never heard from again, despite several attempts by the researcher to make contact with

him. This made the planned data collection, in addition to the in-depth interviews, impossible.

2.6 SUMMARY

This chapter discussed the three categories of research design, namely, exploratory, descriptive and causal. Exploratory research was deemed as most suitable for this study as the nature of the problems in the Eastern Cape Province fresh venison industry needed to be explored, and possible niche market opportunities identified. The units of analysis (respondents) were identified and an analysis of the two main methods of research, namely, qualitative and quantitative, was given. A qualitative research method was justified as appropriate for this study. The collection of primary and secondary data for the study was described. The in-depth interviewing method was justified to be most suitable considering the nature of the topic and the depth of expertise of qualified personnel in the Eastern Cape Province fresh venison industry. The final section of this chapter identified some of the problems encountered during the course of this study.

Chapter 3 provides a background to the challenges facing the Eastern Cape Province fresh venison industry.

CHAPTER 3
CHALLENGES TO THE EASTERN CAPE PROVINCE FRESH
VENISON INDUSTRY

3.1 INTRODUCTION

The aim of the Eastern Cape Province fresh venison industry is to establish the market for venison and to get it to a level where venison is easily attainable, and frequently purchased. Currently, with respect to fresh venison in the Eastern Cape Province, the most relevant question to ask is why there is not an established market with a significant demand.

This chapter profiles the major problems associated with the Eastern Cape Province fresh venison industry. These problems include a lack of knowledge and awareness of venison among consumers, cultural differences and preferences of consumers, absence of a formal infrastructure, and a lack of accurate data. A suitable method of addressing these problems is required. One such method could be a niche marketing approach, as will be pointed out towards the end of this chapter.

3.2 LACK OF KNOWLEDGE OF VENISON

3.2.1 Confusion surrounding the term, venison

Radder (2001, p.1) states that consumers' ignorance about products such as venison adds to the slow development in the market. Respondents 1 and 2 (personal communication, May-June 2001) indicated that consumers know very little about venison and its merits. This could partly be attributed to confusion surrounding the term venison. There seems to be contrasting views, even among experts in the venison industry, as to whether the term venison is a collective term for wild game, or refers specifically to antelope. If there is no clarity among experts in the field as to what venison encompasses, one can hardly expect consumers to know and trust the product. Advertisements from a local butchery that advertises products such as "sit-bok meat" (the word used for a baboon among some of the rural population) add to the dilemma. When consumers see venison mince, they have reason to be apprehensive.

3.2.2 Venison as a product

Venison has typically been associated with dry products such as biltong sticks and dried sausage. The fresh product has mostly been associated with a by-product of the hunt.

The fact that sports and trophy hunting is generally a seasonal practice conducted during the winter months causes people to believe that venison is a product which can only be obtained seasonally. Seasonal hunting is slowly changing as hunting and harvesting on fenced-in farms now also takes place throughout the year. The most favourable time for hunting, however, remains the winter months with colder nights.

3.3 CULTURAL DIFFERENCES AND CONSUMER PREFERENCES

People who live in farming districts may be more aware of venison and its merits since they have grown up with the product, but numerous marketing challenges exist with regard to 'city dwellers' (people who live and have been brought up in cities) who might not be accustomed to the product. The findings indicate that overseas, mainly in Europe, there is a lot happening with regards to the marketing of venison. Restaurants and butcheries spend a lot of money on training their staff on how to sell and market venison. Food shows are often held, and decision makers in the venison industry go to these shows and share knowledge and information. New products are displayed, as well as the latest machinery used to produce these products and eliminate wastage. The awareness levels of venison, to both consumers and industry personnel, are far

more heightened in Europe than in South Africa, and the Eastern Cape Province in particular.

Furthermore, half of the respondents indicated that the eating and drinking culture of the Eastern Cape Province is not as adventurous as that of Europe, or even of Johannesburg and Cape Town, where consumers are renowned for having a more cosmopolitan culture, are more readily adaptable to change and more adventurous in terms of eating habits. Consumers buy and eat numerous varieties of exotic meat in Europe, whereas in South Africa (predominantly in provinces such as the Eastern Cape Province) consumers seem merely to want traditional and conventional meat dishes. Eastern Cape Province consumers live a different lifestyle compared with the more wealthy and cosmopolitan lifestyles of those in the Western Cape and Gauteng Provinces.

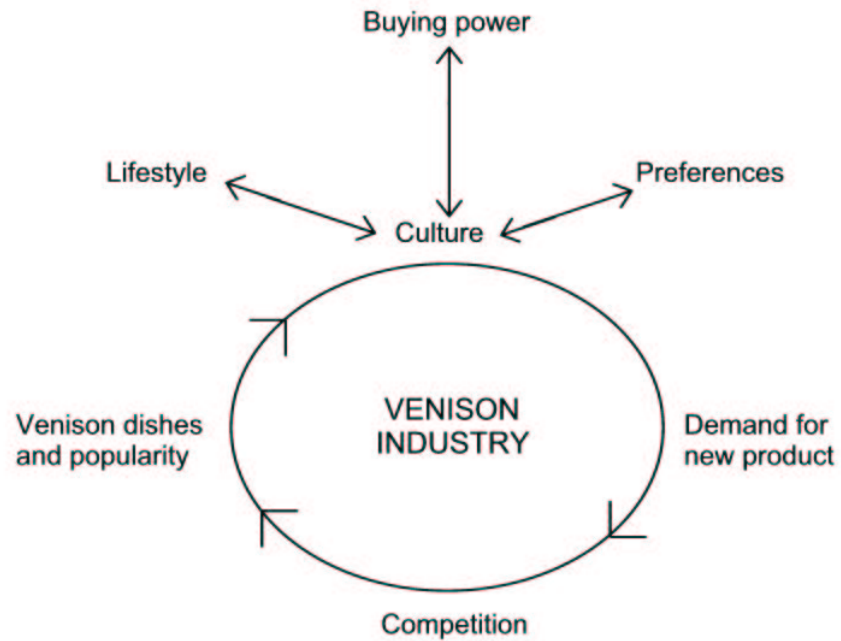
Europeans are more aware of health issues associated with meat, and are therefore more likely to want something organic and natural, such as venison. Kampman (2002, p.23) believes that the international market is ready to import large quantities of South African produced organic products, but that the local South African market is too small and few consumers can afford organic products. This point underscores another problem facing the Eastern Cape Province venison industry. All of the higher value cuts of venison are generally exported to Europe, as the demand for venison is

greater and higher prices can be attained, particularly due to the exchange rate. At the time of this study, it made sense to export the top grade product, since venison is not freely available in supermarkets in the Eastern Cape Province, and is hence not selling well.

The growth of the Eastern Cape Province venison market is also challenged by the effect of consumers' lifestyles. Proportionately more consumers in Johannesburg and Cape Town tend to eat out and try new and different restaurants compared with the Eastern Cape Province where this activity is performed to a lesser degree. A point made by one of the respondents is that in the Eastern Cape Province when consumers can afford to go out for a meal they would rather have the tried and tested beefsteak where one knows what one is getting, rather than taking a chance on a special venison dish which is more expensive, and the consumer is unsure what he/she will receive. Consumers are hence less willing to experiment with premium priced dishes.

This could be one of the reasons why venison is more popular in areas such as Cape Town and Johannesburg. These areas offer a greater variety of choices, and in the process competition is intensified. A situation of interrelationships is thus created as shown in Figure 3.1.

Figure 3.1 The interrelationship between culture, lifestyle, competition and growth in the venison trade



Source: Researcher's own construction

Particular lifestyles, consumer income levels and preferences result in a demand for new products. This demand stimulates competition among restaurants which could then experiment with venison dishes, in turn stimulating the industry and creating new products.

3.4 LACK OF A FORMAL INFRASTRUCTURE AND CONTROL

Contrary to the formal meat sectors of beef, chicken and pork, no formal chain of supply from producer to abattoir, to

wholesaler/broker, to retailer, to consumer exists for venison. The chain for fresh venison is a very informal one with the result that there is no control over the quality of products that enter the market.

Conventional meat that enters the market moves via approved abattoirs, with specific health regulations, before entering the market. A system of control is in place where the quality of the product must be inspected before it is offered to the final consumer. Venison meant for the local market has no such system of control. Although an inspector has to be present at the harvesting process, it is still possible that meat that is the by-product of the hunt could enter the market without the necessary control.

The venison that reaches the consumer is hence not necessarily of a high quality, and there is also no certification of quality attached to the product. This means that in most cases the consumer has no idea when, where or how the animal was killed or handled. The animal might have been killed in a very stressed condition, not have been hung properly (if at all) and most importantly, may not have been gutted and handled in a hygienic way (personal communication, Respondent 4, November 2001). The cleaning and gutting process the animal goes through once it is culled is an extremely important process (personal communication, Respondent 1, May 2001; personal communication, Respondent 4, November 2001). The carcass also needs to be hung and cooled properly in

abattoirs or portable cool trucks. Heat loss from smaller animals such as springbuck, is relatively fast, but larger animals, for example, eland, take a long time to cool down (personal communication, Respondent 4, November 2001). All of these variables affect the product and could render it inferior in quality.

A further problem resulting from a lack of formal infrastructure and supply chain is that venison of a variable or inconsistent quality could enter the market. As a result, consumers might one day purchase a very nice piece of venison, while this is not the case the next day. A first experience with inferior quality meat may result in consumers never wanting to purchase venison again, and informing their friends and family never to do so either. This could be highly detrimental to the venison industry.

Certification and traceability would result from a well-developed industry with a formal infrastructure. In Europe specific venison products can be traced from the restaurant where they are served, throughout the supply chain, right back to the farm or reserve where harvesting took place. All the details of the animal that was killed can be obtained, including the day it was shot and details of the kill. This also applies to venison originating in South Africa and exported to Europe (personal communication, Respondent 1, May 2001).

If such a system of certification can take place in the export market, then similar controls need to be implemented in the local market. Currently no such system is implemented and this affects the reliability of the local supply chain and the quality of venison that this chain supplies.

Respondents 1,2 and 4 (May-November, 2001) all believed that part of the reason for the venison sector's lack of a formal supply chain lies with the South African government. The government is not supportive of the venison industry, and as a direct result, the venison industry does not have the required support to plan and set up the infrastructure required to implement quality venison supply chains (personal communication, Respondent 1, May 2001; personal communication, Respondent 4, November 2001). The minimum standard of quality needs to be stipulated by the government and enforced.

3.5 LACK OF ACCURATE DATA

Another significant hindrance to the venison industry of the Eastern Cape Province is that there is a lack of information from a research and planning point of view. The start of any project should be research. Planning an industry involves research and viability studies, and the first most logical phase with regard to planning an industry, long before considering a marketing campaign, should be

to ascertain an accurate account of game quantities. The numbers of sheep and beef in the formal meat sector can be estimated and predicted with a fair degree of accuracy (personal communication, Respondent 4, November 2001). The same cannot be said for venison, however: not even qualified personnel within the industry could estimate, with any real degree of accuracy, the number of animals, such as kudu or springbuck, in the Eastern Cape Province. The first research in this regard is currently conducted at the Port Elizabeth Technikon. Other research into the Eastern Cape Province venison industry is equally sparse with the only published research being that of Radder (2002). A study by Le Roux (2002) is also still underway.

3.6 ADDRESSING THE CHALLENGES OF THE EASTERN CAPE PROVINCE FRESH VENISON INDUSTRY

In analysing the challenges to the Eastern Cape Province fresh venison industry discussed throughout this chapter, it appears that lack of knowledge is the core problem. Venison is a relatively new market in the context of the meat industry of the Eastern Cape Province, and could be a reason for this lack of knowledge.

When a new product has to be introduced to the market it is often desirable to start with a small section of the market. Magrath (1995, p.28) makes the point that new products can create niche

markets, such as the example of Swatch, which created a niche market by turning low-cost quartz movement watches into a youth market fashion statement.

Based on the knowledge and awareness of Eastern Cape Province consumers, venison as a product is in between the initial and growth phases of its product lifecycle. Doyle (1998, p.161) submits that a niche strategy is more viable in the early and growth stages of the market, and Kotler (1994, p.404) determines that firms entering a market should aim at a niche initially rather than the whole market. A niche marketing strategy is characterised by targeting specific markets with unique needs. In the case of venison, this could be the health conscious group of consumers.

Demand might be undersized initially, but will expand as the awareness of venison increases, and as consumers are educated about venison and its merits. The concept of differentiation can be used to distinguish venison from other conventional and non-conventional meat. Such differentiation is the basis of a niche marketing strategy, and will be shown as such in subsequent chapters. Bradley (1995, p.357) argues that differentiation is a strategy favoured during the emergence of a product life cycle.

The ensuing two chapters discuss the concept of niche marketing, and differentiation as the basis of niche marketing. These chapters

take an integrated approach where the theory behind niche marketing and differentiation is discussed from a practical stance as well as in the light of the Eastern Cape Province fresh venison industry. Niche marketing and differentiation will be shown to address the challenges to the fresh venison industry which are currently being faced in the Eastern Cape Province.

3.7 SUMMARY

This chapter identified the main challenges to the marketing of fresh venison in the Eastern Cape Province, and the problems that are encountered. The four problems, which are discussed, are the lack of knowledge of venison in the Eastern Cape Province, cultural differences and consumer preferences, lack of formal infrastructure and control, and a lack of accurate data. The most appropriate method of addressing these issues is niche marketing. The reasoning for this is justified in the final section of this chapter.

Chapter 4 addresses the concept of niche marketing.

CHAPTER 4

THE CONCEPT OF NICHE MARKETING

4.1 INTRODUCTION

A niche market is typically a small market whose needs are not being well served. These customers have more narrowly defined needs or unique combinations of needs than other market segments (Kotler, 1999, p.27; Kotler, 2000, p.257).

Niche marketing can be viewed from two angles. It can be seen as a form of specialisation where niche markets typically include smaller groups of consumers with specific needs (Bradley, 1995; Carter, 2000; Kotler, 2000; Leduc, 2000), or as a form of segmentation where niching is the last stage of the segmentation process following targeting and positioning (Dalgic & Leeuw, 1994; Shani & Chalasani, 1993; Tamagnini & Tregear, 1998).

This chapter discusses the aforementioned concepts from a theoretical perspective, as well as from a practical stance. Appropriate elements of the theoretical information are applied to fresh venison as a niche market, thereby integrating the primary and secondary data.

This chapter, and the next, attempt to address some of the issues identified in chapter 3. Based on the lack of knowledge of venison in the Eastern Cape Province, coupled with cultural and lifestyle differences which are not as cosmopolitan as those of Cape Town and Johannesburg, these chapters seek to establish niche marketing as a basis for overcoming these problems and, utilising differentiation and specialisation, to identify niche market opportunities and specific target markets. The primary aim of this study is to show that venison can be targeted at, and seek to satisfy, niche markets with specific needs that are currently not adequately addressed.

4.2 THE NICHE MARKETING CONCEPT

Dalgic and Leeuw (1994, p.39-45) hold the view that “new demands, changing customer motivations and further individualisation... have created a multitude of diverse and fractured markets in contrast to what once was a simple mass market.”. This statement supports the view of Kenna and Kauffman (in Shani & Chalasani, 1993, pp.58-66) that “a massive upheaval in the social landscape has fragmented the market”. Kenna and Kauffman argue that the emphasis on producing, marketing, and advertising to a large homogeneous market is increasingly less effective.

The increased fragmentation of the market is changing the practice of marketing. The concept of mass marketing is becoming obsolete, and the more focused, specialised and customer oriented approach of niche marketing is being instigated. Dalgic and Leeuw (1994, pp.39-45) attest that mass marketing companies are under pressure from niche marketers, who are nibbling away at the major markets of these mass marketing companies.

New measures of dealing with the market are required (Shani & Chalasani, 1993, pp.58-66). Kenna (in Shani & Chalasani, 1993, pp.58-66) affirms that niche marketing can be used as an alternative to mass marketing, or even to market segmentation. Dalgic and Leeuw (1994, pp.39-45) substantiate the point that instead of pursuing the whole market, or large segments of the market, firms can target "segments within segments", or niches.

A niche can be considered to be a market consisting of a small group of customers with similar characteristics or needs (Dalgic & Leeuw, 1994, pp.39-45). Niche marketing, in turn, may be seen as a creative process known as nichemanship, which is "a process of carving out a small part of the market whose needs are not fulfilled".

Leduc (2000) describes the following characteristics of a “narrowly defined group” or niche market:

- Individuals in the group have the same specialised interests and needs;
- Members of the group have a strong desire for what is being offered;
- Members of the group have a reason to do business with a particular firm rather than a competitor;
- Prospects within a group can be easily reached;
- The group is loyal enough to produce the value of business needed; and
- The group is small enough that the particular firm’s competition is likely to overlook it.

Kotler (1994, p. 404) characterises the “ideal market niche” as having the following characteristics:

- The niche is of sufficient size and purchasing power to be profitable;
- The niche has growth potential;
- The niche is of negligible interest to major competitors;
- The firm has the required skills and resources to serve the niche in a superior fashion; and

- The firm can defend itself against an attacking major competitor through the customer goodwill it has built up.

Kotler (1997, p.251) also lists several other characteristics of an attractive niche (not noted in 1994). These include:

- The customers in a niche have a distinct and complete set of needs;
- The customers will pay a premium price to the firm best satisfying their needs; and
- The nicher gains certain economies through specialisation.

Kotler (2000, p.257) notes that niche marketers presumably understand their customers' so well that the customers willingly pay a premium.

In 1994 Kotler argued that the niche is usually of *negligible* interest to competitors. However, in 2000 he stated that the niche is *not likely* to attract competitors. This implies a stronger possibility of competitive threat. This change in emphasis could be attributed to the perception of Linneman and Stanton (in Kotler, 2000, p.258) that "there are riches in niches... [and] companies will have to niche or risk being niched". Kotler (2000, p.258) aptly argues that in many markets today, niches are the norm.

Another characteristic of a niche market is that niche companies offer products and services of higher value to customers than other companies do (Dalgic & Leeuw, 1994, pp.39-45). The reason behind this is that niche products and/or services are created specifically for the customers who buy or use them and therefore these customers are receiving higher value.

Based on the characteristics of a niche market (discussed in the literature) an ideal niche market for venison would probably have a number of unique characteristics. It is proposed that:

- Individuals within the niche market will have the same distinct, complete and specialised interests and needs regarding venison;
- Individuals will have a strong desire for venison and the services associated with it;
- Firms involved in producing and marketing fresh venison will have the required skills and resources to serve the niche in a superior fashion and offer higher value;
- The niche will be of sufficient size, growth potential and purchasing power to be profitable;
- The niche will be of negligible interest to major competitors and will be independent;
- The nicher will gain certain economies through specialisation;
and

- Customers will pay a premium to the firm best satisfying their needs.

After close scrutiny of all of the characteristics of a niche market, a niche market for venison can be defined as:

a narrowly defined, yet profitable specialty market, where competition is non-existent or poses no threat, and of which potential customers have specific, similar and strongly desired needs and wants that justify paying a premium price.

4.3 APPROACHES TO NICHE MARKETING

Two approaches to niche marketing can be identified from the literature, namely, focusing on a small, specialised section of the market (Bradley, 1995; Carter, 2000; Kotler, 2000; Leduc, 2000), or as the last stage in the segmentation process following targeting and positioning (Dalgic & Leeuw, 1994; Shani & Chalasani, 1993; Tamagnini & Tregear, 1998). These two approaches are discussed in the next section.

4.3.1 Specialisation

An important link between specialisation and niche marketing exists as is illustrated by a number of authors.

Leduc (2000) states that “the more narrowly you define your niche market the easier it is to cater to the specifically defined interests of people in that market.”. Carter (2000) takes this point further relating that “customers come to you because you offer a specialty.” Bradley (1995, p.126) believes that niche markets“ are typified by specialist needs among small groups of customers”, and Kotler (1994, 1997, 1999, 2000) notes that specialisation is one of the most important elements of niche marketing.

Specialty produce also seems to have wide appeal. For example, farmers grow different varieties of watermelons to meet changing consumer tastes (Templeman, 1997). Venison is a product that fits in perfectly with this aspect of niche marketing. It is a speciality product in that it is a red meat that can meet changing consumer needs, especially those for healthier lifestyles (see section 4.4).

In discussing specialisation and niching, Kotler (1997, p.397) identifies a number of specialisation forms. These can broadly be defined as specialist roles linked to the user, the product, or some marketing-related aspect. Each of these specialist roles can lead to distinctive competences on which firms can base unique

competitive advantages. The different forms of specialisation are discussed below in more detail.

4.3.1.1 End-user specialisation

End-user specialisation involves specialising in serving the end-user. Boyd, Walker and Larreche (1995, p.195) maintain that a niche-market strategy involves serving one or more segments, which suggests that more than one end-user can form the focus of a specialised niche strategy (Murray & O'Driscoll, 1996, p.208). This implies that these segments are served with differentiated products and marketing strategies in order to target these different end-users.

Possible types of end-users of venison include foreigners, travellers (both by air and sea) and health conscious consumers aware of the organic and natural qualities of meat. These markets will be discussed in more detail in chapter 6.

4.3.1.2 Vertical-level specialisation

When applying vertical-level specialisation, a firm specialises at some vertical level of the production-distribution value chain level. For example, a butcher may only sell higher valued cuts of venison

such as kudu steaks and fillets of the fresh variety, thereby excluding dry venison (biltong) and the lower valued cuts.

4.3.1.3 Customer-size specialisation

Here a firm concentrates on selling to either small, medium-sized, or large customers. Many nichers specialise in serving small customers who are neglected by the large firms. Such customers could include small, specialised delicatessen outlets.

An example of a small-sized South African market is the 'organic aware market', discussed in more detail in chapter 6. Lifestyles are changing and the 'organic aware' customer could represent a unique niche market.

4.3.1.4 Specific-customer specialisation

In following specific-customer specialisation a firm limits its sales to one or a few major customers, for example, certain exclusive butcheries and specialist exotic meat outlets. This form of specialisation also fits the profile of marketing venison to the health conscious, or the organic aware market.

4.3.1.5 Geographic specialisation

When a firm sells only in a certain locality, region, or area of the world, for example, only Eastern Cape Province, or Port Elizabeth, it engages in geographic specialisation.

Many of the major marketers of venison still concentrate on international markets as these markets are more profitable than is the local market.

4.3.1.6 Job-shop specialisation

A firm may customise its products for individual customers, for example, a venison butcher may perhaps create venison dishes and recipes for particular customers who like different cuts, seasonings, presentations of venison (vacuum packed, in marinade, thinly sliced, stuffed), or according to the specifications of major restaurants and hotels.

4.3.1.7 Product or product line specialisation

Here a firm carries or produces only one product or a product line, such as a specialised delicatessen that only carries fresh venison.

4.3.1.8 Product feature specialisation

A firm could also choose to focus only on a specific product feature. For example, a butcher can establish itself as only specialising in organic, natural, red meat.

4.3.1.9 Quality/price specialisation

A firm may choose to operate at the low or high quality ends of the market, for example, by selling only to higher income groups or selling mostly to the lower end of the market.

In an attempt to penetrate the market some firms might initially target the top end of the market, including restaurants and specialised delicatessens, with the higher priced cuts such as venison fillet.

4.3.1.10 Service specialisation

A butchery selling venison may offer one or more services not available from other butcheries, such as home delivery, cooking lessons and distribution of brochures and pamphlets introducing new recipes and venison products.

4.3.1.11 Channel specialisation

A firm may specialise in serving only one channel of distribution, for example, supplying venison directly to the consumer or selling only bulk sized orders to restaurants, hotels, other butcheries and retailers.

4.3.2 Niche marketing and segmentation

The second approach to niche marketing identified by Dalgic and Leeuw (1994, p.39-45) is viewing it as the final stage of the segmentation process (following on from targeting and positioning).

According to Michaelson (in Shani & Chalasani, 1993, pp.58-66), niche marketing simply takes segmentation one step further, by dividing market segments into smaller segments. Dalgic and Leeuw (1994, pp.39-45) note that the definition put forward by Michaelson assumes that segmentation is a starting point in niche marketing.

It is, however, important that a segment is not confused with a niche. Tamagnini and Tregear (1998, p.4) maintain that a clearer distinction between a segment and a niche may be obtained by focusing on the philosophy that drives each one. According to these authors a market segment is derived from market

segmentation, whereas a niche is derived from the concept of product differentiation.

Shani and Chalasani (1993, pp.58-66) state that segmentation involves the breaking up of a large market into smaller pieces. It is a top down approach in that the marketer begins with a mass market and divides it into smaller markets. In contrast, niche marketing is a bottom up approach where the marketer starts with the needs of a few customers and gradually builds up a large customer base. Shani and Chalasani (1993, pp.58-66) therefore assert that in segmentation the emphasis is on differences in the market place, whereas in niche marketing the emphasis is on similar needs and consumption patterns.

Dalgic and Leeuw (1994, p.39-45) identify a further difference between niche marketing and market segmentation, in that a segment derives from a pre-existent product which is improved, while niche markets often have their origins in latent demand. Consumers may be prepared to buy something with a particular mix of qualities, independent of a product known to meet their desires. This description of niche marketing deriving from "latent demand" fits into the argument concerning venison. A large proportion of the Eastern Cape Province market is ignorant of venison, particularly its benefits (personal communication, Respondents 1, 3 & 4, May-November 2001). If the consumer is made aware of, and educated

about, venison and its merits, several viable niche markets may be discovered.

The differences between a segment and a niche are summarised in Table 4.1.

Table 4.1 Differences between a segment and a niche

SEGMENT	NICHE
Top down approach	Bottom up approach
'Breaking up' market based on differences	'Aggregating' market based on similarities
All segment members are considered identical	Emphasis on individuals
Larger in size	Smaller in size
Emphasis on splitting the market into smaller manageable parts	Emphasis on fulfilling a specific need
Improvement of pre-existing product	Based on latent demand

Source: Adapted from Shani and Chalasani (1993, pp.58-66); Dalgic and Leeuw (1994, pp.39-45)

From an analysis of the differences listed in Table 4.1, niche marketing may be termed "inverted or reversed segmentation". (Dalgic & Leeuw, 1994, pp.39-45; Tamagnini & Tregear, 1998).

4.4 THE MOVE FROM MASS MARKETING TO NICHE MARKETING

Wisner (1999, p.124) points out that some marketers develop products for large undifferentiated markets or mass markets without regard for individual differences among potential consumers. He highlights that mass market products can appeal to anyone, “no matter what income level, ethnic background, gender or occupation”. A mass marketing strategy means “ignoring any segments that may exist and addressing the total market with one market strategy” (Murray & O’Driscoll, 1996, pp.206-207).

Henry Ford epitomised the concept of mass marketing when he offered the Model T Ford to potential customers who could have the car in any colour they desired, as long as it was black (Kotler, 1997, p.250). Ikerd (1994), however, relates that simply because people were willing to accept the black Model T Ford does not mean that everyone “preferred” that colour, and that those who were not totally satisfied represented market niches for other car makers.

It was indicated in section 4.2 that changing customer needs resulted in a fragmented market. The overcrowding of too many products in the market also has a direct effect on *competition* within the market environment. As a result of overcrowding, competition has become very intense.

The red meat market is an example of a mature market which has a great deal of competition. This competition comprises not only conventional red meat products such as beef, pork and lamb, but also non-conventional meat products such as venison, crocodile, warthog and ostrich. Chicken and fish (white meat alternatives), as well as substitutes for meat such as soya, also all form part of competition within the red meat market.

As a result of this competition, the concept of niche marketing would seem to be a more feasible option than mass marketing when marketing a product like venison. Ikerd (1994) states that the "industrialisation of agriculture... has created a multitude of niches in markets that are largely undiscovered". To the Eastern Cape Province, venison can be viewed as a "largely undiscovered" niche market (personal communication, Respondent 1, May 2001).

Another prominent element which has affected the fragmentation of the market and calls for a move from mass to niche marketing is the changing of *lifestyles*. Consumers are adopting healthier lifestyles. Cholesterol is an important element predominant in unhealthy eating, and eating healthier food therefore forms a substantial part of this healthier lifestyle. Elliot (1993, p.26-29) states that "consumers have been bombarded with advice on how to reduce the fat content of their diet, particularly saturated fat". He

deliberates that for those customers who take note of such warnings yet still wish to eat *red* meat, “nothing could be better than to consider the merits of venison”. The fat composition of farmed venison compares favourably with beef and lamb. Its (venison’s) cholesterol content in both wet fat and lean tissue is about half that of beef and lamb (Elliot, 1993, pp.26-29). It is therefore clear that venison can form an important part of a person’s diet if red meat is desired, but has been advised against for health reasons. If potential red meat eaters have a need to opt for a low fat or low cholesterol diet, then such a market may be a viable niche market opportunity for venison.

A further factor highlighting changed consumer needs is the greater emphasis on *food safety*. In Europe, with diseases such as Mad Cow and Foot and Mouth disease, a requirement of all meat might soon be for it to be organic. In this event South African venison is the perfect product to fit this demand. More Europeans are insisting that meat from animals treated with hormones and bred/reared in manipulated environments is not acceptable. A practice that has become the norm is to treat food with hormones. Since people are greedy and need to compete, the aim is to get animals as fat as possible as quickly as possible. A prime example of this is boiler chickens which are fed up quickly so that more meat can be taken from them and sold in as short a time as is possible. Results of this

type of behaviour can be seen in salmon having cataracts on their eyes and deformed fins.

Europe is now becoming far more aware that hormones are not ideal. People don't want to eat animals raised in false environments and associate deformed and sick animals with poor quality meat which therefore affects their perception of taste. The paradigm that is now becoming the norm in Europe is that if it is not natural it is not wanted. South Africa is far behind this level of thinking, and this is one of the reasons why a product such as venison does not yet constitute a bigger part of the South African diet (personal communication, Respondent 1, May 2001; personal communication, Respondent 3, August 2001).

4.4.1 Target marketing and niche marketing

It was pointed out in section 4.3.2 that niche marketing can be viewed as the final stage in the segmentation process, following on from targeting and positioning. However, a difference in opinion on how these concepts are related will be pointed out below.

Evans and Berman (1994, p.302) maintain that the target market process consists of three general phases: analysing consumer demand, targeting the market and developing the market strategy. According to Kotler and Armstrong (1996, p.235) and Kotler (1997,

p.249) the target market process occurs when the seller identifies or distinguishes market segments, selects one or more of them and develops products and marketing programmes tailored to each segment. This process consists of three phases, namely, market segmentation, market targeting and market positioning. Pride and Ferrel (1997, p.177) put forward the theory that although marketers may employ several methods for target market selection, they generally use a five-step process. This five step process includes: identifying the appropriate targeting strategy, determining which segmentation variables to use, developing market segment profiles, evaluating relevant market segments and selecting specific target markets.

A comparison of the theories of the target market process shows that the models put forward by Evans and Berman (1994, p.302), Kotler and Armstrong (1996, p.235) and Kotler (1997, p.249) are very similar in process and structure. The model suggested by Pride and Ferrel (1997, p.177), however, is very different. Pride and Ferrel perceive that the targeting strategy is selected *pre-segmentation*. Conversely, the models rendered by Evans and Berman, and Kotler and Armstrong suggest that targeting strategy (target market approach/process) follows market segmentation and occurs at the second phase of the targeting strategy; in other words, *post-segmentation*.

For the purpose of this study the model put forward by Pride and Ferrel will be disregarded. An adapted process framework is hence proposed that could be used to aid the understanding of the concept of niche marketing and how it is linked within the target marketing process. The framework is shown in Table 4.2 and followed by a discussion.

Table 4.2 Framework of the target marketing process

<u>Step 1</u> MARKET SEGMENTATION	<u>Step 2</u> MARKET TARGETING	<u>Step 3</u> MARKET POSITIONING
Identify segmentation variables Segment market Develop profiles of resulting segments	Evaluate attractiveness of each segment Select target segment(s)	Identifying possible competitive advantages (using differentiation) Selecting the right competitive advantages Communicating and delivering the chosen position

Source: Adapted from Kotler (1997, p.249); Kotler and Armstrong (1996, p.256)

4.4.2 Step 1 - Market segmentation

Market segmentation is the process used to segment markets. “In developing a target market strategy, firms often rely on market segmentation – dividing the market into distinct subsets of customers that behave in the same way or have similar needs”

(Evans & Berman, 1994, p.302). Each of these subsets of customers constitutes a target market (as discussed in 4.3).

4.4.3 Step 2 - Market targeting

Evaluating the attractiveness of each segment involves evaluating different market segments. “The firm must look at two factors: the overall attractiveness of the segment, and company’s objectives and resources” (Kotler, 1997, p. 269). A firm must therefore ensure that a market segment is viable in terms of size, growth and profit potential and that investing in this segment makes sense given its objectives and resources.

The second phase of Step 2, selecting target segments, forms an integral part of this study. A more detailed discussion of the process of target segment selection will therefore now follow.

Evans and Berman (1994, p.323) and Strydom, Jooste and Cant (2000, p.129) observe that marketers can choose between three broad approaches to target marketing (also known as selecting the target segment), namely: undifferentiated marketing (mass marketing), differentiated marketing, or concentrated marketing.

Strydom et al. (2000, p.130) illustrate that apart from these three approaches, two further strategic options can be used for targeting

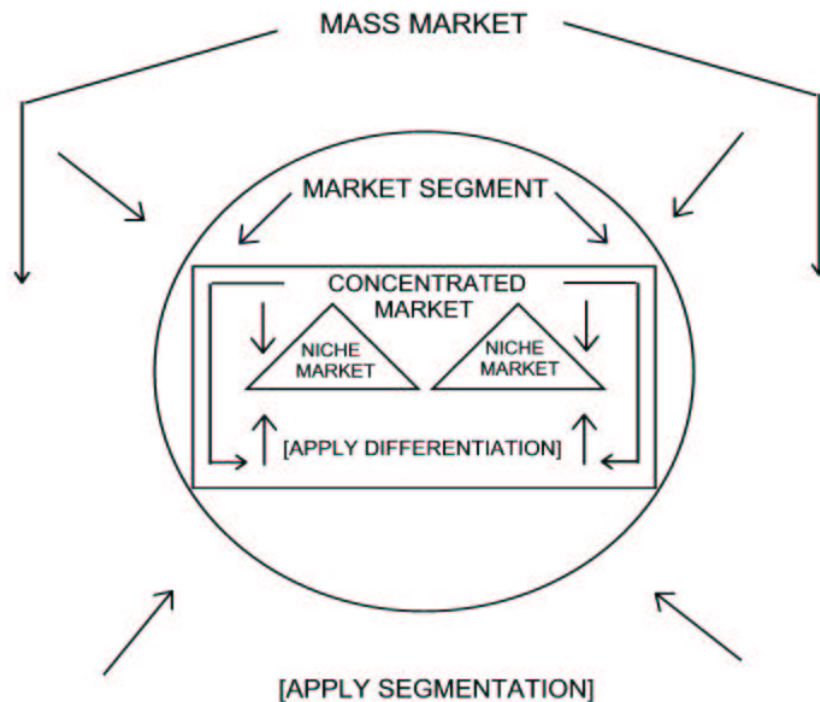
the market, namely, niching and mass customisation. Mass customisation does not form part of this study, and differentiated marketing forms the focus of chapter 5. Thus only concentrated marketing is now discussed in more depth.

While concentrated and niche marketing may appear to be similar, there are certain essential differences, the most important being that niche marketing can be seen as a form of concentrated marketing.

Concentrated marketing focuses on understanding the needs, motives and satisfactions of a single segment, and is “a strategy used to select one segment of a market for targeting market efforts” (Lamb, Hair & McDaniel, 2000, p.22). However, Kotler (1999, p.27) observes that niches, in contrast to concentrated target markets, typically describe smaller sets of customers who have more narrowly defined needs or unique combinations of needs. Strydom et al. (2000, p.129) support Kotler’s argument, explaining that even when customers in a given segment share common needs, there are still differences that cannot be fully addressed with a concentrated strategy. As a result, there is an opportunity for businesses to carve out niches within segments and to further focus on and customise marketing efforts for those niches (Strydom et al, 2000, p.129).

Figure 4.1 summarises and illustrates the relationship between mass markets, differentiated and concentrated markets.

Figure 4.1 Inter-related concepts of the target market concept



Source: Researcher's own construction

The third step of the target marketing process is market positioning which involves identifying possible competitive advantages based on the concept of differentiation (Kotler, 1997, p.294). Since positioning therefore takes place post-differentiation, market positioning will be discussed in more detail in chapter 5, bearing in mind both differentiation and competitive advantage.

4.5 SUMMARY

Chapter 4 defined niche marketing and explained the characteristics of niche markets. Two approaches to niche marketing were discussed, and specialisation was highlighted as an important element of niche marketing. The different forms of specialisation were discussed in terms of the practical implications of the niche marketing of venison, and the key differences between a segment and a niche were categorised. An important section of this chapter was the move from mass to niche marketing. As part of this section, niche marketing was examined in relation to the target market process. The essential differences between concentrated and niche marketing were highlighted, and a discussion of the target market process and the associated elements of niche marketing, differentiation, positioning and competitive advantage ended the chapter.

Chapter 5 deals with differentiation and its role in the niche marketing of fresh venison in the Eastern Cape Province.

CHAPTER 5

DIFFERENTIATION AS A KEY ELEMENT OF NICHE MARKETING

5.1 INTRODUCTION

Fragmentation of the market was discussed in chapter 4, and the concepts of specialisation and segmentation were concluded to be essential elements which have to be incorporated in a niche marketing strategy.

Another essential element of niche marketing is that of differentiation. By differentiating products and targeting specific consumer groups, small producers can take advantage of market opportunities that larger companies may be unwilling or unable to satisfy (Phillips in Tamagnini & Tregear, 1998). According to Kinsey (in Tamagnini & Tregear, 1998), this is particularly so in the food industry, where fragmentation of consumption has led to increasing consumer demand for specialised and customised products.

The key elements and dimensions of differentiation form the focus of this chapter, and will be discussed theoretically and in the light of the empirical findings of the study.

5.2 DIFFERENTIATION: A CONCEPTUALISATION

Differentiation is “the act of designing a set of meaningful differences to distinguish the company’s offering from competitors’ offerings” (Kotler, 2000, p.287). Phillips (in Tamagnini & Tregear, 1998) states: “By differentiating products and targeting specific consumer groups... producers can take advantage of market opportunities”. Hooley et al. (1998, p.46) note that differentiation entails “creating something that is seen as unique in the market”. Differentiation also leads to a competitive advantage as “in order to create a better positioning for your product in the market you have to differentiate your product from your competitor” (Dalgic & Leeuw, 1994, pp.39-45).

In 1991 Kotler put forward five differentiation *strategies*. These strategies are linked to the concepts of: product/service, customer service, channel of distribution, communication and price. Nine years later, Kotler (2000, p.288) prefers to call these strategies differentiation *dimensions*. Since there is no clarity on any differences that exist between the said terms, these concepts will be treated as the same.

Table 5.1 lists the dimensions of differentiation and their respective elements suggested by Kotler (2000, p.288). A detailed discussion

of all of the differentiation variables falls beyond the scope of this study, hence only those variables which are deemed appropriate for the differentiation of venison, namely product, services and personnel, are discussed.

Table 5.1 Differentiation dimensions and their elements

Product	Services	Personnel	Channel	Image
Form	Ordering ease	Competence	Coverage	Symbols
Features	Delivery	Courtesy	Expertise	Media
Performance	Installation	Credibility	Performance	Atmosphere
Conformance	Customer training	Reliability		Events
Durability	Customer consulting	Responsiveness		
Reliability		Communication		
Repairability				
Style				
Design				

Source: Adapted from Kotler (2000, p.288)

5.3 PRODUCT DIFFERENTIATION

An understanding of the term "product differentiation" first requires an understanding of the term "product". In commodity markets a supplier's product is a simple idea: it is a physical item produced or sold by the firm (Doyle, 2000, p.202). However, firms increasingly augment products with a range of services and/or supplementary products to increase market competitiveness, particularly to gain

competitive advantage. Hence a product could be more broadly defined as “anything that is intended to meet a customer need or want” (Doyle 2000, p.203). This means products can be physical goods, services, people, organisations or ideas. More importantly, a product can be a combination of any of these concepts.

In an attempt to more accurately define a product, a number of authors differentiate between different levels or elements of a product. Levitt (in Hooley & Saunders, 1993, p.210) suggests that products and services can be seen on at least four main levels, namely, the core product, the expected product, the augmented product and the potential product. Alder (2001, p. 67) more or less agrees with these terms and collectively refers to them as the ‘total product concept’. While also acknowledging similar levels of a product, Kotler (2000, p.286) prefers to refer to them as a “customer value hierarchy”. Table 5.2 compares the different terms used to describe a product.

Table 5.2 Terms used to describe a product

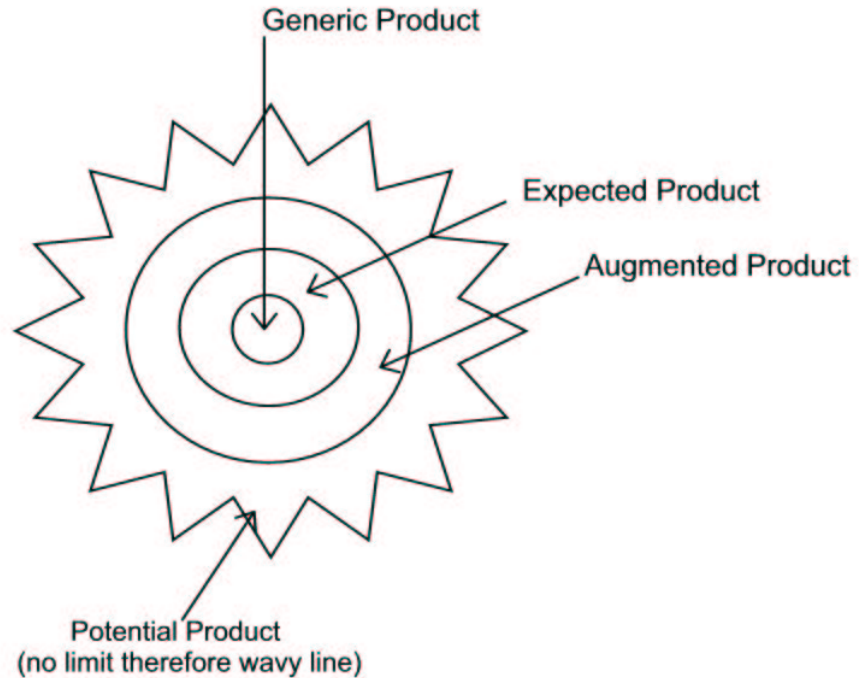
<i>Kotler’s terminology</i>	<i>Levitt’s terminology</i>	<i>Alder’s terminology</i>
Basic product	Core product	Generic product
Expected product	Expected product	Expected product
Desired product	Augmented product	Augmented product
Unanticipated product	Potential product	Potential product

Source: Adapted from Kotler (2000, p.286); Levitt (in Hooley & Saunders, 1993, p.210) and Alder (2001, p. 67)

Despite the difference in terminology, the meaning the different authors attach to product differentiation is essentially the same. The *basic* product is the core, or generic product. All three authors use the same term to describe the *expected* product. Levitt and Alder refer to an *augmented* product as creating more value for customers, hence the reason for Kotler's reference to the desired product, since customers always desire more value. Levitt's potential product can probably be seen as a product which customers do not anticipate, despite the product having a potential benefit. Once the potential product is created and its benefits realised, it may then become something that customers want, despite the product having never before been anticipated. It could therefore not affect the customers' view of the product, and its absence will not alter the impression of the product, although its presence will enhance it.

For the purpose of this study, the terminology used by Levitt (in Hooley & Saunders, 1993), Kotler (2000) and Alder (2001) will be used interchangeably as it is perceived that all will aid the understanding of the four levels of the *total product/service*. The total product and its various levels are depicted in Figure 5.1.

Figure 5.1 The total product concept



Source: Adapted from Alder (2001, p.67)

5.3.1 The basic (core, generic) product

The basic or core product, according to Hooley and Saunders (1993, p.210), is the central or generic product or service, while to Alder (2001, p.67) the generic product is the “rudimentary ‘thing’ the customer is buying”. As such the generic product or service tends to be the tangible aspects of the total product. Venison as a product of the flesh of antelope includes cuts of meat from antelope such as kudu, eland, impala, duiker, springbuck and blesbuck.

5.3.2 The expected product

According to Alder (2001, p.68), the expected product includes the generic or basic product as a minimum, but extends to also include whatever the customer expects. Customers base their expectations partly on the sort of *service* they have come to expect from other suppliers and competitors.

Customers would probably expect venison to be available in a variety of different cuts such as fillet, rump, sirloin, prime and spare rib, topside, silverside, shoulder steak, striploin, tenderloin, goulash, and trimmings (Bothma, 1996; Amatola brochure, 2001). Customers might also expect venison to be available as schnitzels, mince, pies, boerewors, kebabs, meat balls, pot roasts, cutlets and the like. Another expectation could be the availability of venison in prepared marinades, for example, venison kebabs in different variations of sauce. Findings indicate that all of these products are already being produced, but that the demand for them has not been developed (personal communication, Respondent 3, August 2001), which could explain why they currently cannot easily be found in retail outlets in the Eastern Cape Province. In Cape Town and Johannesburg these products are more widely distributed and should they be required, can more easily be found.

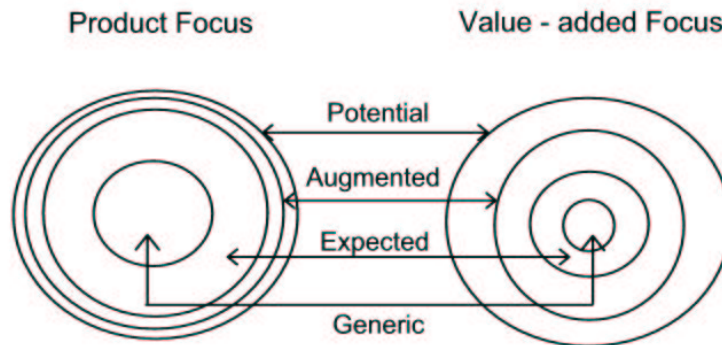
In terms of the expected service, consumers would expect the same basic service from venison butchers as they currently expect from butchers and meat retailers who sell conventional meat products. This basic service might not be a motivation for customers to purchase venison, but its absence could deter them from considering such an acquisition.

5.3.3 The augmented product

Peters (in Hooley & Saunders, 1993, p.212) believes that in the past suppliers have concentrated on attempts to differentiate offerings on the basis of generic (core/basic) and expected products. He proposes that a greater emphasis be placed on the augmented (desired) and potential (unanticipated) product as ways of adding value, creating customer delight and hence creating competitive advantage. Doyle (2000, p.203) points out that a firm can go even further than the expected product by augmenting the product to exceed what the customer was expecting. He calls this the *augmented product*. Similarly, Alder (2001, p.69) asserts that marketing “goes beyond giving the customer what he or she expects”. He maintains that the augmented product introduces the surprise element, which is “so important in winning and keeping customers”.

The move from attempted differentiation of the core product to emphasis on the augmented or unanticipated product is reflected in Figure 5.2.

Figure 5.2 Alternative emphases for differentiation



Source: Adapted from Peters (in Hooley and Saunders, 1993, p.212)

5.3.4 The potential product

Doyle (2000, p.204) states that the potential or unanticipated product offers “a total solution to the customer’s ultimate or potential need”. It is difficult to predict what the potential or unanticipated product or service potential of venison is. As Alder (2001, p.70)

states, “product augmentations that will surprise customers and add to their expectations... constitute the potential product, for which there is no limit and which we cannot begin to imagine right now – or we would be augmenting the product already”.

5.3.5 Product levels as satisfiers and motivators

The four levels of the total product can be regrouped as *satisfiers* and *motivators*. In essence, the ‘satisfiers’ include the core and expected product, while the ‘motivators’ consist of the augmented and potential product. The researcher embraces a statement made by Hooley and Saunders (1993, p.215) that the core and expected product offerings must be present in order for the product or service to be considered by potential purchasers. The presence of the said essential elements “does not enhance the probability of consumers choosing the products with them, but their absence will certainly deter purchase” (Hooley & Saunders, 1993, p.215).

This may be true in essence; however, venison’s core product itself offers a competitive advantage, but without offering the extra services and related motivators deemed to be of more importance, this competitive advantage may perish quickly. Venison’s characteristic of being organic/natural and the fact that there are so many different tastes and textures among the different forms of antelope, are both satisfiers and motivators concurrently.

5.4 DIFFERENTIATION BASED ON THE PHYSICAL PRODUCT

Hooley and Saunders (1993, p.210) assert that product differentiation “seeks to increase the value of the product or service on offer to the customer”. According to Crego and Schiffrin (in Kotler, 2000, p.286), customer-centred organisations should study what customers *value* and then prepare an offering that exceeds their expectations. The different dimensions of product differentiation are discussed below.

5.4.1 Form

The *form* of a product can be defined as its size, shape or physical structure (Kotler, 2000, p.289). The *core* product of venison is the basic tangible *form* or structure of venison. Venison is a red meat from the flesh of antelope. However, venison has the advantage over other meats in that its *form* is not limited only to different *cuts*, such as striploin or tenderloin, but also offers different *species* of venison.

Some of the conventional species from which venison is obtained include springbuck, impala, kudu, blesbuck, eland and duiker. This variety contributes to the augmented product or “surprise element” embedded in a product as pointed out by Alder (2001, p.69). This

surprise element could present a useful competitive advantage. Products such as lamb and chicken can have different taste experiences depending on the origin of the meat, for example, chicken from France has a unique taste from other chicken, and Karoo lamb has a different taste to lamb originating from other regions. Venison, however, has a different taste experience that can be attributed not only to possible different origins, but also to different antelope species. In this regard, one can say that venison is unique from any other type of meat. The meat of each different species from which venison is obtained has a different texture and a different flavour. As a core product, venison thus offers a choice of species, cuts, and possibly different origins. The core product in actual fact may be viewed as being augmented.

5.4.2 Feature

Features of a product are the characteristics that supplement its basic function (Kotler, 2000, p.289). The *core feature* of venison can be said to be the fact that it is low in cholesterol, fat and calorie content and high in protein. This makes it ideally suited to low cholesterol and other health diets (Nel, 1989, p.18). Based on this generic feature, venison could therefore be differentiated from conventional meats such as beef, pork and lamb. In addition, South African venison can be differentiated from ostrich, a competitive product in terms of its equally low calorie and fat content, on the

basis that venison is truly organic and natural, whereas ostrich is not since it needs to be dipped (personal communication, Respondent 1, May 2001).

5.4.3 Performance and conformance quality

Performance quality refers to the performance level at which a product's primary characteristics operate: low, average, high or superior. *Conformance quality* is the degree to which produced units are identical and meet promised specifications (Kotler, 2000, p.289). These definitions appear to be more suited to industrial products, but these elements can also be related to the differentiation of venison.

The *performance* of venison would probably be judged based on consumers' expectations of the taste experience, which in turn is influenced by the quality of the meat. Particularly consumers' first experience of venison, which they purchase and cook *themselves*, is of prime importance. If there is going to be any repeat business, the product which the consumer purchases must be top quality.

In addition to being a so-called *high performance* and high quality product, venison must *conform* to a certain standard so that repeat purchases of the product will mean the same quality of meat and a similar taste experience. Since venison is a relatively new product

in terms of awareness and demand in the Eastern Cape Province, its quality and consistency will have to be high if venison is to be readily accepted.

5.5 DIFFERENTIATION BASED ON SERVICE

“When a physical product cannot easily be differentiated, the key to competitive success may lie in adding valued services and improving their quality” (Kotler, 2000, p. 292). In this regard, ordering ease and customer consulting are the elements most applicable to venison.

5.5.1 Ordering Ease

Ordering ease refers to how easy it is for the customer to place an order with a company (Kotler, 2000, p.292). In the case of venison, a client could expect to order a certain *quantity* and *type* of venison, such as half a kilogram of shoulder steak or fillet, possibly even in a certain marinade, and receive it within a certain acceptable period. An added basic expectation would be the option of placing an order by telephone.

Home delivery could take the role of ordering ease to the next level, and is a differentiable variable that could be implemented to augment the product. Kotler (2000, p.292) defines delivery as how

well the product or service is delivered to the customer. This includes speed, accuracy, and care attending the delivery process. Venison could possibly be ordered not only over the phone, but also online via electronic media (e-mail) and Internet. The order could then be delivered to the stipulated address at the specified time.

Specific venison dishes could be ordered for particular functions or dinner parties, pre-prepared, delivered, and even arranged and served. These additional service possibilities could extend as the popularity of venison increased, thereby further augmenting the overall venison product in order to retain the 'surprise element' which is "so important in winning and keeping customers" (Alder, 2001, p.69).

5.5.2 Customer consulting

Customer consulting refers to data, information systems and advisory services that the seller offers to buyers (Kotler, 2000, p.294). The service that accompanies the sale of venison is as important as the product itself. Organisations can therefore differentiate themselves from competitors by providing information and advice to customers. Customers may need information on the product such as basic cooking instructions, suitable recipe suggestions and storage (freezing) advice. It is therefore important that those personnel who come into contact with customers are

knowledgeable and well informed. Particularly in the case of a specialised delicatessen, one might expect the services of a Master Butcher.

5.6 DIFFERENTIATION BASED ON PERSONNEL

Service is a major differentiating factor in the purchase of many products (Hooley & Saunders, 1993, p.214). “Companies can gain a strong competitive advantage through having better-trained people” (Kotler, 2000, p.295). Providers of venison could therefore take the role of service one level further than the expected and differentiate their firm’s offering based on personnel.

While customers expect the following characteristics of personnel, the firm could ‘surprise’ its customers by the *standard* of these characteristics:

- competence in terms of their skill and knowledge of venison, its derived products and recipes;
- courtesy projected by the friendly, respectful and considerate approach of the staff;
- credibility portrayed by the staff where consumers trust their advice with regard to venison, including recipes, cooking tips and purchase instructions;

- reliability of performance by staff so that the service offered to customers is consistent and accurate: for example, if deliveries and orders are placed, or requests made, they are met and fulfilled;
- responsiveness by staff who respond quickly to customers' requests and problems without having to be frequently reminded; and
- communication between the staff and the customer, where staff make an effort to understand the customer and communicate clearly.

Findings derived from the empirical research show that a Master Butcher, in particular, would be expected to exhibit all of these traits. The consumer would expect that the butcher be knowledgeable about venison, and to be able to trust the butcher's advice. If an order were placed the consumer would expect to be able to go to the delicatessen at a pre-arranged, convenient time to collect it.

5.7 DIFFERENTIATION, POSITIONING AND COMPETITIVE ADVANTAGE

Market positioning is the third step of the target marketing process (dealt with in chapter 4) and is the act of designing a firm's offering

and image so that it occupies a distinct and valued place in the target customer's mind.

According to Ries and Trout (1986, p.2), positioning shifts the emphasis of marketing from the product to the mind of the prospective consumer. Kalafatis, Tsogas and Blankson (2000) point out that the emphasis of the argument put forward by Ries and Trout centres around the communication/advertising elements of positioning. Strydom et al. (2000, p.131) deliberate that a product's 'position' in the market place is perceptual rather than factual which has led some marketers to the conclusion that positioning can be primarily associated with the communication elements of the marketing mix namely advertising, promotions and publicity. This is in line with the argument by Kalafatis et al.

Market positioning involves 'identifying possible competitive advantages' based on the concept of differentiation, and then 'selecting the right competitive advantages' in order to distinguish the product from that of competitors (Kotler, 1997, p.294). Differentiating a product from competitor offerings thus enables firms to create a better position for their product in the market place (Dalgic & Leeuw, 1994, pp.39-45). Kotler and Armstrong (1996, p.256) support this statement by arguing that positioning begins with actually *differentiating* the company's marketing offering so as to give consumers more *value* than competitor offerings. Kotler and

Armstrong (1996, p.256) observe that consumers typically choose products and services that give them the *greatest value* and that the key therefore to winning and keeping customers is to understand their needs and buying processes better than competitors do. In doing so a firm delivers more value to customers and this leads to *competitive advantage*. “To the extent that a company can position itself as providing superior value to selected target markets... it gains competitive advantage” (Kotler & Armstrong, 1996, p.256). In view of the foregoing, it is important to take cognisance of the importance of positioning and competitive advantage in developing a niche marketing strategy.

Kotler (2000, p.298) notes that not all differences are meaningful and worthwhile. This makes selection of suitable competitive advantages an important step in market positioning, as each difference has the potential to create company costs as well as customer benefits. The final stage of market positioning is ‘communicating and delivering the chosen position’ (see Table 4.2 in chapter 4), and this step indicates that once a company has developed a clear positioning strategy it must be communicated effectively (Kotler, 1997, p.301). In order to be effective, all of the elements of a company’s marketing mix must support the chosen positioning strategy (Kotler & Armstrong, 1996, p.260) since it is the positioning of this marketing mix that influences potential

customers' overall perception of a brand, product line, or organisation in general (Lamb et al., 2000, p.231).

While the concept of positioning is essential to the marketing of venison, it can only be analysed in detail once all of the elements of the marketing mix have been determined. This study deals predominantly with the product and does not delve into the other three elements of the marketing mix, namely, pricing, distribution or promotion in any depth. As such it is not viable to address a positioning strategy for fresh venison in the Eastern Cape Province based on this study.

5.8 SUMMARY

The concept of differentiation and its application to the marketing of fresh venison in the Eastern Cape Province formed the basis of this chapter. The differentiation dimensions and their elements relevant to the niche marketing of fresh venison were defined and discussed. The key dimensions of product, services and personnel differentiation were analysed, and the relevant elements which fall under these dimensions were discussed with respect to the total product concept. The total product concept determines the different levels of a product/service based upon the value which consumers receive from that product/service. These levels are classified as satisfiers and motivators and are used to analyse the elements of

differentiation dimensions relevant to the niche marketing of venison. The final section of this chapter addressed the concepts of differentiation, positioning and competitive advantage, indicating their inter-relationship and how these concepts affect each other and work together.

Chapter 6 identifies possible niche markets for fresh venison in the Eastern Cape Province.

CHAPTER 6

POSSIBLE NICHE MARKETS FOR FRESH VENISON

6.1 INTRODUCTION

The aim of this chapter is to identify possible target niche markets based on the concept of niche marketing and the strategy that drives it, namely, differentiation. Differentiation (which formed the basis of chapter 5) seeks to differentiate the product and service offered in order to offer customers better value than they perceive to have received from any other product or service.

The differentiation of venison was based on venison's specialist roles. It is the differentiation of these specialist roles (highlighted in chapter 5) which leads to competitive advantage. Based on this competitive advantage venison can be targeted at consumers who require a specialised niche product or service; these consumers hence constitute niche markets.

This chapter considers differentiation opportunities (possible niches) based on the type of industry, end-users and the role of relationship marketing.

6.2 NICHE MARKETS WITHIN AN INDUSTRY

Kotler (2000, p. 287) contends that the number of differentiation opportunities (possible niches) varies with the type of industry. Table 6.1 depicts four types of industries based on size and number of differentiation opportunities available.

Table 6.1 Industries based on differentiation opportunities

		Number of approaches to achieve advantage	
		<i>Few options</i>	<i>Many options</i>
Scope of advantage	Large	VOLUME INDUSTRY	SPECIALISED INDUSTRY
	Small	STALEMATED INDUSTRY	FRAGMENTED INDUSTRY

Source: Adapted from Kotler (2000, p. 288)

Each of these four industries (volume, specialised, stalemated, fragmented) is briefly discussed, followed by an explanation of the position of the venison industry.

6.2.1 Volume industry

A volume industry is one in which companies can gain only a few, but rather large, competitive advantages.

6.2.2 Stalelated industry

A stalelated industry is one in which there are a few small potential competitive advantages.

6.2.3 Fragmented industry

A fragmented industry is one in which companies face many opportunities for differentiation, but each opportunity for such advantage is small.

6.2.4 Specialised industry

A specialised industry is one in which companies face many differentiation opportunities and each differentiation can have a high payoff.

The Eastern Cape Province fresh venison industry is essentially a specialised one. Venison is a speciality product in that it is a red meat that can meet changing consumer needs, especially those for healthier lifestyles. As can be seen in Table 6.1, the venison industry is characterised by many differentiation opportunities available to create competitive advantage. Each of these opportunities can have a high payoff.

Apart from having a high payoff, each of the niche opportunities also has associated risks. Kotler (in Shani & Chalasani, 1993, pp.58-66) makes the point that two major risks are inherent in a niche strategy. The first risk is an attack by a competitor wanting to gain a share of the niche market, and the second is the 'drying up' of a niche due to customers' change in preference.

There are two methods which can be used to counteract and alleviate such risks. The first is to target more than one niche, which in modern day colloquialism may be defined as not putting all one's eggs in one basket, and the second is through relationship marketing. These methods are subsequently discussed in more detail.

6.3 MULTIPLE NICHING

Kotler (1997, p.398) argues that because niches can weaken, new niches must continually be created; a firm should stick to its niching, but not necessarily its niche. Kotler therefore concludes that *multiple niching* is preferable to single niching. By developing strength in two or more niches a company increases its chance for survival.

Dibb and Simkin (1996, p.81) observe that nichers are often the most vulnerable competitors in the market and that they must

therefore avoid competition with other organisations in order to ensure success, particularly as markets become more mature. These niche markets are secured by specialising (discussed in 4.3.1 of chapter 4), but a nicher must avoid becoming overly committed to one small area of the market. Dibb and Simkin (1996, p.81) conclude that nichers can avoid this over dependence by “being strong in more than one niche”. This is known as *multiple niching* or a *multiple niche strategy*. A multiple niche strategy involves the recognition that several segments exist and the adoption of an objective of serving two or more segments with differentiated products and marketing strategies (Murray & O’Driscoll, 1996, p.208).

The empirical research revealed the following niche markets: the tourist market (in terms of being a visitor to South Africa), travellers (both by sea and air), the ‘organic aware’ generation, and pet food buyers.

6.3.1 Tourist market

The tourist market could potentially be one of venison’s primary markets. A marketing idea derived from the empirical findings was to offer venison at typical ‘tourist hangouts’. These ‘tourist hangouts’ could include game reserves and prominent tourist hotels.

One of the respondents suggested that venison should be intensely marketed at game reserves throughout the Eastern Cape Province. Tourists want to try unusual products, and to tourists South African venison (antelope) is unusual. Restaurants at game reserves, such as Addo, Kariega and Shamwari should endorse venison products. Venison can be marketed as a 'typical South African dish', or labelled with the 'Proudly South African' symbol. Venison should be endorsed as native to South Africa, and therefore when in South Africa the product must be eaten.

The researcher contends that a marketing strategy that could be incorporated for tourists would be to eat the animal that they have seen on the game drives during the day. For example, tourists may see kudu and springbuck on the game drives they take and then find their meat on the menu in a restaurant that afternoon or evening. Such a strategy could certainly appeal to tourists and enhance venison as a typical traditional South African dish originating from South African game.

Another idea with regard to the marketing of venison to tourists is to serve venison on incoming flights from international destinations. If venison is served on the airline in which foreigners are entering South Africa, they would get their first 'taste' of South African venison on the flight and their first taste of typical South African food. By targeting this market, one is in essence targeting a niche

within a niche. This clarifies the statement made by Strydom et al. (2000, p.129) that there are opportunities to carve out niches within segments (or other niches) in order to further focus and customise marketing efforts on those niches.

A sub-niche of the tourist market could be referred to as travellers, since tourists obviously do a great deal of travelling

6.3.1.1 Travellers (foreign and local)

There are many modes of travel available to travellers, and these different modes can be described as sub-niches of travellers. The most common forms of transport used by travelling tourists are airlines and cruise ships. The researcher believes that airlines are typically used by foreigners who are on business, whereas cruise ship travel would only be for holidaymakers.

a) Airline travellers

Radder (2001, p.17) profiles the characteristics of a “typical venison lover” as a “male foreigner or South African businessman over the age of 40 and in the middle to high income group”. This definition fits perfectly into the niche market of an airline traveller, whether the traveller is a foreigner, or a South African, either on holiday, business, or both. Businessmen are passengers who would

typically fly First and Business Class, and hence could represent a unique niche target market. South African Airways used to offer venison, particularly kudu roasts, to First and Business Class passengers on flights to and from South Africa. However, the non-availability of the product to economy class passengers might reinforce the perception that venison is meant mostly for the higher income groups. This is a perception that needs to be changed and ideally venison should be served to Economy Class passengers as well as to First and Business Class; a possible way of doing this could be to offer smaller portions on Economy Class in order to keep the cost down. Events such as the September 11 crisis have unfortunately reduced the number of international travellers and hence those that could be introduced to venison.

As an alternative strategy to enhance travellers' exposure to information on venison, venison dishes could be accompanied by so-called 'table talkers' or pamphlets which could give consumers some information on the product such as its nutritional value, or about the animal itself. Such a strategy could aid in expanding the awareness of venison to both tourists and locals alike.

By being introduced to venison on an airline such as South African Airways, foreigners/tourists may be encouraged to further try the product when they are in South Africa, particularly if they want to experience something typically South African. By the same token,

South Africans will be made more aware of venison, and its importance as a typical South African product will be highlighted. The 'table talkers' could list those restaurants where venison is a specialty and this would promote both the product and restaurant alike by encouraging tourists and foreigners to frequent these establishments. Such a strategy could be very effective since foreigners/tourists often do not know where to eat, and which restaurants to go to, and this could provide a solution to their problem.

b) Cruise ship travellers

Another possible niche market for venison could be cruise ship travellers. Since the September 11 crisis, holiday travellers have been utilising alternative means of travel other than flight, and the popularity of cruise ship travel has been on the rise.

It is hoped that the Coega project in the Eastern Cape Province, which aims to make the Port Elizabeth port globally recognised (along the lines of the old Alexandria in Egypt), will increase the amount of traffic (particularly of foreign tourist travellers) through Port Elizabeth. Marketing venison as not only traditionally South African, but also traditionally an Eastern Cape Province dish would offer an opportunity worthy of further investigation.

6.3.2 “Organic Aware” generation

Marketing venison to the organic aware market could be one of the most viable means of marketing venison. Society is becoming more aware of the merits of organic and natural products and as such, markets that fall within this spectrum could form viable niche markets.

All of the respondents agreed that particularly in Europe, people are becoming far more conscious and aware of the ‘health aspect’ of food. In Europe the paradigm of healthy eating, of which organic plays a huge role, is a way of life. Hutchins and Greenhalgh (1997, p.2) conducted a survey which revealed that 93 per cent of the respondents purchased organic food for health reasons, and/or because it is better for children. Even though the awareness of ‘organic’ is not nearly at the same level in South Africa as it is abroad, the thinking still exists. Woolworths, for example, offers organic products. While these products currently cater for a small percentage of consumers, the awareness levels and benefits of eating organic products can only increase. Among other effects, this increase may be attributed to satellite television. Having a satellite dish is becoming more and more the ‘norm’ and consequently South Africans are becoming exposed to programmes such as Carlton Food Network (CFN). All products used on CFN

are 'organic', right down to the vegetables, and this concept of organic and natural is idealised on the programme.

The nutritional values of certain meats are indicated in Table 6.2. The potential of venison as a niche product is enhanced by its health qualities as well as the fact that it is organic. It can be classified as free-range meat that is reared in its natural habitat. This could be one of venison's competitive advantages over other meat products.

Table 6.2 Nutritional values of meat* (Based on 85 gram portions)

MEAT	CALORIES	PROTEIN (grams)	FAT (grams)	CHOLESTER OL (mg)
Ostrich	97	22	2	58
Springbuck	130	22	3	62
Beef	240	23	15	77
Lamb	205	22	13	78
Pork	275	24	19	84
Chicken	140	25	7	72
Turkey	159	24	6	72

*Information supplied by the US Department of Agriculture bulletin "Nutritive Value of Foods".

Source: Adapted from Amatola brochure (2001)

As shown in Table 6.2, ostrich and venison have the lowest values in all respects; ostrich is lower than venison in all cases with the

exception of protein content. Venison cannot therefore be marketed as 'stand alone' and 'unique' in terms of being healthy (low in fat, cholesterol and calories, and yet still relatively high in protein); however, it can be marketed as *organic* whereas ostrich cannot. Ostrich is not organic, as the bird needs to be dipped, reared and immunised (injected to counteract disease). Contrastingly, antelope do not require any of these processes, and therefore the competitive advantage of venison is that it is totally organic.

Despite the health advantages of venison and the fact that it is organic, many South Africans are still dubious of the claim that produce is organic. The term organic is a fairly new concept and marketers must thus be careful not to discount certain markets by targeting others. A comparison may be drawn here with beer drinkers who may be put off a certain brand of beer if it is low in alcohol, or with chocolate lovers who believe that healthy chocolate is an immediate reason not to purchase it. In the same way, certain markets may be put off venison simply because of the claim that it is healthy red meat.

There is resistance to 'health' and 'organically labelled' products. The resistance originates from the perception that healthy products are inferior in taste. The reasoning behind this is that in the past if something was made healthy it often did not taste as good as the

original, such as the examples of healthy chocolate and low alcohol beer. This is now changing, and just because something is healthy does not mean it is hindered in flavour. Therefore, in order for the marketing of venison to be successful, it can be argued that it should not merely be promoted as being 'healthy', but rather as a product which is really flavourful; a superior quality meat with an added health bonus. Consumers can eat as much of it as they want without having to worry about their cholesterol levels increasing.

In the empirical study, one respondent indicated that consumers in general (even in South Africa) are starting to move towards healthier eating, and thus claims that a product is healthy would not deter markets that don't generally opt for such products. The claim made was that bottled water and white meats are becoming a more regular part of South African diet and that healthy and natural red meat fits in with this healthier way of eating.

A perception gleaned from the research findings was that South Africa is still too premature a market to target the organic 'health' market, and that it would be more effective to promote the product as 'natural'. In essence these two concepts mean the same thing, and if the South African market is dubious and not ready for the organic brand, then it may be more effective to brand the product as natural.

One way of overcoming the 'debate' surrounding South African consumers' readiness for organic products might be to target different markets. Hutchins and Greenhalgh (1997, p.3) state: "The market can only truly be stimulated by looking at the consumer". This means that to market the product effectively one must look at what the consumer is looking for and market it that way. Hutchins and Greenhalgh (1997, p.3) conclude that the strategy should be focused on promoting what is rising in importance on the consumer's agenda: "same product, different label". This focuses the discussion on branding, where totally different markets may be targeted with the same product, simply using different branding and targeting strategies.

6.3.2.1 Branding

Etzel, Walker and Stanton (1997, p.242) define a brand as "a name and/or mark intended to identify the product of one seller or group of sellers and differentiate the product from competing products". Lamb et al. (1994, p.286) hold the view that the "success of any business or consumer product depends in part on the target market's ability to distinguish one product from another".

Etzel et al. (1997, p.251) acknowledge that "more and more frequently, firms are employing a multi-brand strategy to increase

their total sales in market". A multi-brand strategy (multi-branding) entails offering "more than one brand of essentially the same product, aimed either at the same target market or at distinct target markets" (Etzel et al., 1997, p.251).

Kotler (1997, p.456) indicates that there are various motives for a multi-brand strategy. Multi-branding could be used in marketing venison to try and "establish different features and/or appeal to different buying motives". Research needs to be conducted on what it is that the consumer wants. The researcher concurs with the statement that "substantial research funding must be directed towards gaining a more comprehensive understanding of consumers' needs (is it 'health', 'nutrition' or 'animal welfare' which most concerns consumers?) and the ways in which organic produce can be marketed to those needs" (Hutchins & Greenhalgh, 1997, p.3).

a) Organic branding

Several possible niche markets can be targeted under the 'organic' label: these include the health conscious, gym goers, cholesterol watchers and people who are trying to lose weight.

Venison could be endorsed by the heart foundation as a very lean and healthy meat. Venison could also be marketed as the 'red

meat that can be eaten all week long' without the concern of cholesterol and weight gain. This market would include anyone who enjoys red meat. It could be marketed as part of 'Slim-U-Slim' or some other form of dietary routine where traditionally red meat has been shunned due to its high fat, calorie and cholesterol levels.

Another market to target is the 'environmentally friendly' market which is against animals being given hormones or 'fed up' specifically to be slaughtered. The meat this market demands must be 100% natural and chemical free.

Finally, the actual 'organic' label could be placed on venison products for those consumers who are totally organically minded and will not eat anything that is inorganic. While there are reservations concerning the organic label, there is still a small niche market which will purchase organic products. The remainder of the market can be targeted using other brand alternatives and by marketing the product as natural and healthy rather than organic.

b) Pet food branding

Another possible niche market opportunity for venison is as pet food. Branding would also be very important here. One would not want other potential markets to perceive venison purely as a product used for pet food. Wisner (1996, p.228) points out that

some marketing oriented companies create new branding for each product they produce. Venison pet food must therefore be a flanker brand, in that it must not be the major product of venison and should be marketed as a disassociated brand.

Kotler (1997, p.456) asserts that multi-branding allows a marketer to “protect its major brand by setting up *flanker brands*”, which in terms of venison would be pet food. Pet food would not be aimed at a primary target market, but rather seen as an avenue to utilise products that are not conventionally used for human consumption. Since even venison entrails are expensive, meal and water would have to be added to get the price of venison pet food down.

An important point to note is that pet food produced with venison would be made with the by-products of venison (the parts of antelope not conventionally used for human consumption), and this market would be created on the back of an organised industry with the objective of marketing as much of the product as possible, thus reducing wastage and increasing profitability.

6.4 RELATIONSHIP MARKETING

The second method of addressing the risk associated with niche marketing is through relationship marketing. One of the most effective ways to exploit niches and avoid the risks associated with

a niche marketing strategy, is through the process of relationship marketing (Shani & Chalasani, 1993, pp.58-66).

Shani and Chalasani (1993, pp.58-66) define relationship marketing as “developing a continuous relationship with consumers across a family of related products and services”. The main objective is to create a strong bond with each customer for mutual benefit. The basis of relationship marketing is to overcome the associated risks of the drying up of niches due to changing consumer preferences, and competitor attacks on market share. Marketers can build enough goodwill through relationship marketing to defend themselves against competitors who try to exploit the same niche (Shani & Chalasani, 1993, pp.58-66).

Relationship marketing can play an important role in the niche marketing of venison. By building up a relationship with potential buyers of venison, consumers will develop a certain loyalty. Shani and Chalasani acknowledge that through the ongoing interaction and two-way communication with niche members, marketers will detect any dissatisfaction or shift in preference early on.

Relationship marketing could therefore be a viable concept, which could ultimately prove to be an essential element of a niche marketing strategy developed for venison. By developing a relationship with customers, marketers would be able to ascertain

particular needs and wants, certain recipes or venison products that there is a demand for, any grievances associated with venison products, feedback on experimental products and the like.

Nel (1989, p.18) states that venison's low fat content makes it very dry if prepared in the same way as other red meats. Two-way communication will allow venison outlets to offer customers advice on how to cook venison properly, and tried and tested recipes would alleviate and reduce problems such as the one referred to by Nel.

Another advantage derived from developing customer loyalty to the niche will manifest itself in that customers will pay a higher price (premium price) to the niche. In the case of a niche market strategy developed for venison, the researcher perceives that the customer will pay a higher price for a red meat that is low in cholesterol, calories and fat, yet high in protein, organic and natural. Consumers who are advised to give up red meat due to above average cholesterol levels could switch to venison (a red meat low in cholesterol) and be willing to pay a higher price. Kotler (1997, p.251) notes that niche marketers presumably understand their niches' needs so well that their customers willingly pay a price premium. The researcher is of the opinion that simply to avoid giving up red meat altogether, customers would pay a premium on venison.

6.5 SUMMARY

Chapter 6 discussed the four different types of industry based on the number of available differentiation opportunities and defined the Eastern Cape Province fresh venison industry as a specialised industry. A strategy of multiple niching was therefore deemed to be most suitable for addressing these many differentiation opportunities, as well as avoiding the risks associated with niche marketing. Possible niche target market opportunities were identified for fresh venison, and discussed. These target markets included the tourist market, travellers (foreign and local) by air and by sea, the organic aware market and the pet food market. Branding is an essential element found to be relevant for the niche marketing of venison, which was discussed with regard to possible target markets. The final section of the chapter dealt with relationship marketing as another method of addressing the risks associated with niche marketing.

A synopsis of findings, and the final conclusions and recommendations pertinent to this study are presented in chapter 7.

CHAPTER 7

SYNOPSIS, CONCLUSIONS AND RECOMMENDATIONS

7.1 INTRODUCTION

The main aim of chapter 6 was to identify possible niche markets based on differentiation. The roles of differentiation and specialisation were shown to work concurrently to target these markets and achieve competitive advantage. Chapter 6 linked the concepts of niche marketing, specialisation, differentiation, positioning and competitive advantage. These concepts, discussed throughout the study, are used to identify and target niche market opportunities, which could prove to be viable markets for fresh venison in the Eastern Cape Province.

This chapter begins with a synopsis of the research from chapters 1 to 6 and then highlights recommendations based on the findings in this study. These recommendations are made with the challenges to the Eastern Cape Province fresh venison market in mind.

7.2 SYNOPSIS OF THE STUDY

Throughout this study an integrated approach to presenting findings was adopted where all data, theoretical and empirical, was

analysed together. The reason for this approach was due to the fact that the theoretical aspects of this study are greatly interlinked.

Chapter 1 highlighted the background to the study and identified the main and sub-problems. The delimitation of the research and definition of key concepts were established, and assumptions made based on this research. A brief overview of related literature was given and the methodology briefly discussed. The chapter closed with the significance of the research and outline of the study. The researcher identified the need, within the Eastern Cape Province, for a regular supply of venison to retail outlets. It was determined that despite this need, venison could not directly compete with the conventional meat market, and that a different approach would need to be used.

Chapter 2 elaborated on the methodology of the study. Three categories of research design were analysed, and exploratory research selected as the choice of design for this study. The units of analysis were then identified. Appropriate methods of research were discussed in the light of the requirements for this study. The collection of data was explored in terms of primary and secondary data being required for this study, and in-depth interviews were scrutinised as they were employed to obtain empirical data for this study. Various data collection techniques were then explored. The

final section of this chapter identified research problems that were encountered.

Chapter 3 dealt with the challenges to the Eastern Cape Province venison market. The main problems were profiled. These included lack of knowledge of venison, cultural differences and consumer preferences, lack of a formal infrastructure and control, and lack of accurate data. The final section of this chapter dealt with addressing these challenges. Niche marketing was proposed as a suitable method for doing this.

Chapter 4 focused on the concept of niche marketing. The concept was discussed and approaches to niche marketing analysed in the light of the fresh venison industry of the Eastern Cape Province. The role and different forms of specialisation were addressed and their suitability to the marketing of venison pointed out. An important section of the chapter profiled the move from mass to niche marketing, and concluded with a discussion of the target marketing process and the essential differences between niche and concentrated marketing.

Chapter 5 addressed differentiation as a key element of niche marketing based on the third phase of the target marketing process. A conceptualisation of differentiation was given and the differentiation dimensions and their elements highlighted based on

the total product concept of the core, expected, augmented and potential product. A discussion of differentiation based on the physical product of venison, associated services, and finally personnel ensued. The final section of the chapter discussed the marketing of venison in terms of differentiation, positioning and competitive advantage.

Chapter 6 identified and discussed possible niche markets based on specialisation, differentiation and competitive advantage. The Eastern Cape Province fresh venison industry is a specialised industry with many differentiation opportunities. These opportunities were found to be most suitably addressed using a multiple-niche strategy where branding plays a key role. Relationship marketing and multiple niching were justified as pertinent methods for addressing the risks associated with niche marketing, namely, attacks from competitors and the drying up of niche markets due to changing consumer preferences.

7.3 CONCLUSIONS AND RECOMMENDATIONS

The conclusions and recommendations gleaned from this research are predominantly discussed using the same structure as in chapter 3, which addressed the challenges to the Eastern Cape Province fresh venison industry, and chapter 6 which addressed possible niche market opportunities based on specialisation, differentiation

and multiple niche marketing. These conclusions and recommendations follow from the empirical and theoretical findings of this research.

7.3.1 Lack of knowledge of venison

The initial and core problem with regards to the marketing of venison can be attributed to a lack of knowledge and awareness of venison. The key reasons why consumers do not purchase the product, and are not actively looking for the product, are due to a lack of awareness, knowledge and education in the venison industry, including the product itself, and the processes involved.

The findings indicate that overseas, mainly in Europe, there is a lot happening with regard to the marketing of venison. People in the venison industry are educated and trained in associated products and services so that they know how to prepare, cook, market and sell venison. South Africa is behind the times as far as this is concerned. The problem therefore is a lack of knowledge, awareness and education at all levels, from the producer to the final consumer.

In order to make the consumer aware of venison, the top end of the market would have to be the initial target. The top end of the market indicates wealthier clientele who frequent restaurants. Only

once consumers have tried and appreciated the taste of properly prepared venison in a restaurant, will they actively go to a retail outlet to purchase it. The view is therefore that once people eat the product and enjoy it, they will then want to purchase it and attempt to cook it for themselves. Prior to selling venison through retail outlets, therefore, consumers must be made aware of venison and its merits. The researcher affirms the thinking that the marketing of venison must start at restaurant level. However, prior to this, the chefs responsible for cooking and presenting venison need to be educated in how to prepare the product in the correct manner. A suggested idea is to bring top qualified chefs together to discuss venison products. The main objective would be to discuss methods to prepare and cook the product, thereby bringing forward ideas on new recipes and exciting dishes.

Venison has many merits but a main complaint of consumers with regard venison is that it is dry and has a wild taste. The wild taste can result from bad hygiene and handling associated with the culling or hanging of the animal, or the product being incorrectly or improperly cooked. The latter is a problem that can be solved by educating the chefs in restaurants and hotels, as well as the butchers who can advise customers how to prepare it. Venison can be dry if not prepared correctly and differently from conventional meats. In such a case all of the merits of venison would otherwise be wasted, since if it does not make for good eating, people will not

buy it. One attempt of an inferior quality product could render consumers very wary of consuming venison again.

The whole industry must be educated about venison, from the producers and suppliers, to the chefs, butchers, and staff in establishments that offer venison. Recommended methods to educate the stakeholders in the venison industry are proposed in this section, and the recommended starting point for the marketing and promotion of venison is through restaurants and hotels.

7.3.1.1 Restaurants and hotels

Since it is perceived that venison is a premium priced product, it may initially be targeted at the more wealthy consumer that dines at 'white tablecloth' restaurants. The buying power of the Eastern Cape Province market is inferior to the buying power of the markets of Cape Town and Johannesburg, and if venison is only offered at 'white tablecloth' restaurants, then the capacity of the target market is diminished due to there being very few 'white tablecloth' restaurants in the Eastern Cape Province (certainly compared to the Western Cape and Gauteng). The researcher therefore contends that initially the 'white tablecloth' restaurants can form the basis of the target market, with the objective of influencing other restaurants in the Eastern Cape Province to carry venison once demand for the product increases. A trickle down effect may prevail

where the target will originate at the top end of the market and eventually move down the scale from the upper to middle class consumer.

It may be concluded that only once a basic awareness of venison prevails, and consumers have eaten (and enjoyed) it at a restaurant or hotel, will they want to purchase it and cook it for themselves and their families. The starting point of retail then must be in a specialised delicatessen, where qualified and experienced personnel specialise in venison.

7.3.1.2 Specialised delicatessens

Specialised delicatessens should specialise in marketing venison to the final consumer. The customer should be the key focus of specialised delicatessens.

Once consumers have tried and enjoyed venison in a restaurant and then purchase it to cook themselves, they will have a certain expectation. This expectation will result from the taste experience they had in the establishment where they ordered venison previously. To address these consumers' expectations suppliers should ensure that specific game marinades and recipes exist so that when consumers cook and eat venison it is not dry and bland, but juicy and flavourful. The consumer must be provided with a

good quality cut of meat, and instructed how to cook the product correctly. These instructions will need to come from a Master Butcher who is experienced in venison and can recommend recipes, cooking instructions and create suitable marinades and products. In conclusion, a specialised delicatessen will need to be run by a specialised and experienced Master Butcher.

7.3.1.3 Service specialisation and relationship marketing

An important aspect of a specialised delicatessen for venison will be the service offered as part of the overall product, as well as the role that personnel plays in the process. This is where service specialisation and relationship marketing must be employed together as one process.

a) Service specialisation

A key element to successfully marketing venison at a specialised delicatessen would be a specialised Master Butcher to run the delicatessen. This butcher would have to be trained and experienced and have a proper understanding of meat and how it must be cut, cooked and served. An important finding of the research was that butchers are partly to blame for the current state of the venison industry. A consumer would expect a butcher and his staff to know about the products that they offer and to be

educated in meat industry. However, respondents found that the butchers of today are not specialty butchers, but rather the employees of the butcheries who have progressed into the position of butcher with no formal training. This is a problem which could be very detrimental to the marketing of venison, since it is a product which requires specific processes in its preparation and cooking to compete with the conventional meat market.

This emphasises the need to train personnel involved with venison. Butchers and their staff alike need to be trained and educated about venison, its merits and associated problems. The Master Butcher must be an authority on venison and should readily be able to give advice to consumers about cooking, and suitable recipes for specific forms of venison meat (different cuts as well as different species of venison). The Master Butcher should also be able to give advice on storage and freezing and recommend and make up marinades and cook-in-sauces associated with different meals, should the customer require this.

b) Relationship marketing

In time the Master Butcher should build up a customer base and get to know and form relationships with individual customers so that a friendly association is built up. This is the ideal position that would arise since the butcher could then make trusted recommendations

to the customer who would take notice. For example, the butcher could recommend a new cut of venison roasted in a cranberry sauce, which the customer simply must try. The butcher would be able to determine the particular likes and dislikes of customers and could therefore offer respective customers better service than they would receive elsewhere. This is of benefit to both the consumer and the butcher since the consumer receives better service, which then promotes loyalty.

Another advantage is that butchers could get feedback on recommended experimental dishes, thereby doing a form of research while at the same time forming a relationship. This could only enhance the reputation of venison as a prime product with associated services over and above conventional meats. In so doing consumers will not object to paying the premium price which venison commands.

A specialised delicatessen, which caters specifically for venison, could potentially work in the Eastern Cape Province, particularly if the Coega project is realised. It might be viable to develop a venison outlet along the lines of a '34 Degrees South' which is located predominantly in 'tourist hangouts' such as The Boardwalk in Port Elizabeth, and the Knysna Waterfront. This franchise specialises predominantly in fish and the outlets themselves are restaurants/specialised delicatessens.

Marketing venison could include recommending specific wines with specific venison dishes and catering for functions. To compliment its food, the restaurant could enhance the experience by offering typical South African décor, music, wine and entertainment.

Another possibility is to create a Food Emporium where customers could obtain specialised products. The idea of an Emporium would be to have several 'specialised stores all under one roof'. These specialised stores could offer services not widely available within Port Elizabeth, such as a specialised venison outlet and specialty game butchers, spice outlets, exotic meat outlets, seafood outlets, and such. The objective of a Food Emporium would be to become a *destination outlet* to which consumers would go directly when they require venison, regardless of the distance, inconvenience or cost.

7.3.1.4 Potential awareness creators

Awareness among final consumers can be stimulated through food shows. A marketing food show such as the Oyster Festival could take place for venison. This would help to make consumers aware of venison thereby increasing demand. At such a Venison Festival experienced chefs could present 'winning venison dishes' for the general public to taste, while restaurants could take up the challenge to outdo competitors based on which establishment can prepare the best dishes.

Another promotional idea is staging a Ready Steady Cook, Carlton Food Network or Jamie Oliver show specifically for venison. This could be a special episode based on food from the Eastern Cape Province. An idea would be to have cookery shows on local Television (SABC 1, 2, 3 and E-TV) as well as DSTV to make people aware of venison and its merits. It is the opinion of the researcher that as organic becomes more and more recognised in Europe and abroad, and is shown as such on DSTV and in foreign magazines, its popularity and demand will also steadily increase in South Africa. Stores such as Woolworths are already promoting organic products and in time, awareness and popularity is expected to increase and apprehensions to disappear.

7.3.2 Cultural differences and consumer preferences

A problem that has occurred throughout the world is to treat all food with hormones and breed/rear animals in false environments. The reasoning for this is due to competition; those who breed and rear chickens and cows for the market wish to outdo their competitors by producing a larger quantity of meat in a shorter period of time. However, predominantly in Europe, consumers are now becoming more aware of the merits of natural and healthy products and realising that hormone fed and falsely reared animals do not offer the best quality meat.

In the Eastern Cape Province there is little competition (in comparison to Europe and the Western Cape and Gauteng Provinces) and so this process of moving away from hormone enhanced to natural food would be much easier. The key, however, is to overcome everyone's apprehension about organic meat and educate people on the basis that natural is best. The comparative higher price of organic products is a serious hindrance at this stage though. Eventually in South Africa, as has occurred in Europe, the importance of knowing that what one eats is healthy and can counteract diseases such as cancer and heart attacks, is expected to take place and overcome consumers' price apprehension.

Another possible way to promote organic or natural meat, and to encourage consumers to purchase and eat products such as venison, is to emphasise cruelty to animals resulting from rearing animals in unnatural environments simply to sell them as quickly as possible.

7.3.3 Lack of a formal infrastructure and control

There is currently no formal supply chain in place in the local market, and meat as a by-product of trophy hunting could easily end up on the retail shelves.

Regulations need to be implemented with regard to venison. These regulations must prevent an animal from being shot on a farm and supplied to a butchery or restaurant without it first being inspected and approved by qualified personnel. Certain stipulations and requirements need to be adhered to and enforced to ensure consistency of the product entering the market. These stipulations should specify that any animal that has been hunted and killed needs to be gutted within a certain period and hung in a cold room for a specific length of time to maintain the required carcass temperature.

If farmers/hunters have their own small abattoirs on their premises, these need to be inspected at regular intervals to ensure that a minimum standard is upheld. If these farmers/hunters want to supply meat to the 'formal meat sector' it must be inspected and passed by qualified personnel, before it is given the stamp of approval. Government intervention is thus required. Currently there is research being conducted with regard to a policy which will propose hygiene regulations where game meat will be subjected to the same hygiene and slaughtering regulations as conventional meat (Olivier, December 2002). The bottom line is that it is essential to the venison market that the same level of control that is stipulated and adhered to for beef, pork and lamb be implemented for venison.

To cull game for industry suitable measures need to be implemented. Some form of passive killing needs to take place where game does not die in a stressed environment. More research needs to be conducted on ways of killing antelope in a way that does not affect the quality of the meat, and where large numbers can be culled in a relatively short time period.

With regard to game that has been shot and is now being sold on the market, some form of certification should be attached to that game indicating when and where it was shot. Effective quality control of venison production needs to be implemented at all levels in the supply chain, as well as traceability of the product back to its origin. A certification of quality needs to accompany the product so that if consumers pick up a piece of venison in a retail outlet they can be assured that the product is of a high quality, and that specific hygiene and quality measures have been implemented.

7.3.4 Lack of accurate data

Before production and marketing strategies can be developed, research, and some form of census concerning venison quantities within the Eastern Cape Province, needs to be conducted. Research is also needed on the various species of antelope. The respective animals' rate of reproduction will also have to be studied. The reasoning behind this research would be to determine what

venison's sustainable off-take is so that planning can extend further. This needs to be done so that production levels can be estimated and supply chains planned accordingly. It is only after all the recommended research has been conducted that the venison industry could be properly planned, and once this is accomplished, feasibility studies could be conducted based on the marketing of venison.

At this stage nobody in the industry is in a position to be able to fund this type of research. There is not the capital capacity to conduct the research necessary to provide the basic answers required for the development of the industry. Government can play an important role by making grants available. While the supply and quality aspects of the venison industry are currently under review, more energies, both financial and otherwise, need to be focused on researching basic unanswered questions before planning and implementation can feasibly and viably take place.

7.3.5 Niche target market opportunities

Based on product, service and personnel specialisation, venison can be differentiated from competitor meat products and create competitive advantage. On the basis of competitive advantage, venison can be targeted at specific niche markets that could prove to be viable opportunities for venison, as discussed in the study.

The application of multiple niching could target the tourist market, and travellers (both air and sea) as sub-niches of this market discussed in chapter 6.

The organic aware generation could also prove to be a very viable niche market opportunity for venison, since the demand for natural, healthy products is increasing.

The market for pet food is another market which could prove to be viable, since parts of venison not conventionally used for human consumption could be put in pet food to minimise wastage. In using a multiple niche strategy branding is very important as the venison pet food industry must not be perceived as related to either the organic or tourist market for venison.

In the light of this study, niche marketing is certainly a suitable means to market fresh venison in the Eastern Cape Province. A niche marketing strategy would most effectively address the challenges of marketing fresh venison. The roles of specialisation and differentiation, which are used to determine competitive advantage, are essential components of niche marketing as they would make the products and services of venison more prominent.

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ANNEXURE A

MODERATOR GUIDE

- What is venison? What are the different forms, features, types, classes and product varieties of venison?
- How could venison be marketed ie. exotic, healthy, organic etc.?
- Why wouldn't a customer currently buy venison? What would be their reasons?
- Can you think of any potential markets, and marketing strategies, that can be used to market venison in the Eastern Cape Province?
- What would motivate customers in the Eastern Cape Province to buy venison? Where would they prefer to buy it?
- How can competition be combated?
- What could be a typical market for venison?
- What are the core advantages of venison as a product?