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Marketing promotions to pregnant women in South Africa

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Marketing promotions to pregnant women in South Africa

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A research report submitted to the Faculty of Commerce, Law and Management, University of the Witwatersrand, in partial fulfilment of the requirements for the degree of Master of Business Administration.

Johannesburg, February 2012

ABSTRACT

Consumers in South Africa are bombarded with an abundance of marketing messages on a daily basis. This information overload has resulted in consumers ignoring certain marketing communications and becoming confused as to which products to purchase. Similarly, marketing communications are not sufficiently tailored for the intended target markets.

In South Africa, most women's purchasing power has been enhanced due to their higher educational levels and employment equity. Considering this, women have become an important marketing opportunity. Thus, the purpose of this research report is to determine which combination of promotional activities is most likely to influence the decision making processes of pregnant women. This research may then be used to develop an integrated marketing campaign targeted to reach medium to high income earning pregnant women.

A mixed methodology of quantitative and qualitative techniques was used to determine which promotional activities are most effective for this intended target market. The quantitative component involved analysing 292 online and intercept consumer surveys using descriptive statistics; exploratory factor analysis and k-means cluster analysis. The qualitative component consisted of eight in-depth consumer and five in-depth trade interviews which were content analysed.

The key findings of this research were that regardless of demographic factors, women in general, and pregnant women in particular, consistently rate the recommendations of healthcare professionals, recommendations of friends and family, samples, price / quantity promotions and loyalty programmes as the most likely interventions to influence their decision making processes. Text message and email adverts, eventing and publicity, as well as celebrity endorsements were rated by women as the least likely interventions to influence their decision making processes.

Notwithstanding this, mass media marketing continues to play a role in stimulating brand awareness, with the most successful campaigns consisting of a combination of above-the-line and below-the-line promotional activities.

DECLARATION

I, Anastasia Irene du Toit , declare that this Research Report is my own work except as indicated in the references and acknowledgements. It is submitted in partial fulfilment of the requirements for the degree of Master of Business Administration in the University of the Witwatersrand, Johannesburg. It has not been submitted before for any degree or examination in this or any other university.

Anastasia Irene du Toit

Signed at: Randburg

On the …….. day of …… 2012

DEDICATION

I dedicate this research report to my beloved parents, Renee and Francois, to my wonderful husband, David, to my little miracle Raphaella and to the lovely ladies of the 'Oligopoly'.

ACKNOWLEDGEMENTS

Special thanks

I would like to express a special word of appreciation to my friends, family, colleagues and to the WBS Faculty Members, your support has been invaluable.

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CHAPTER 1: INTRODUCTION

1.1 Purpose of the Study

The purpose of this research is to determine which combination of above-the-line and below-the-line promotional activities influences the decision making processes of pregnant women. This research may be used to develop an effective integrated marketing campaign targeted to reach medium to high income earning pregnant women within South Africa, and who fall within the private healthcare sector.

1.2 Context of the Study

Consumers in South Africa are bombarded with an abundance of marketing messages on a daily basis. These marketing messages occur on the television, on the internet, in newspapers and magazines, on street poles, on public bathroom doors, in doctors' waiting rooms, in nightclubs, in movie theatres, in shopping centres and retail stores. This information overload has resulted in consumers becoming increasingly desensitized to mass-media marketing communications and the effectiveness of such promotional activities is being questioned (Peattie and Peattie 1993; Moses 2003).

Advertising agencies within South Africa are paid large sums of money by firms in order to market their brands effectively. This is a daunting task for advertising agencies, with intense competitor rivalry, as everyone tries to get their marketing message heard. Furthermore, the economic downturn and accelerating product life cycles have made competitor rivalry even fiercer in order to ensure their long-term survival (Peattie and Peattie 1993; Naidoo 2011). The economic downturn has also resulted in the reduction of consumer spending due to the decreased levels of disposable income among middle class families (Naidoo 2011). Shopping centres have recorded lower foot counts and with fewer consumers in the retail stores there is less spending, particularly on luxury goods (Lana 2009; Naidoo 2011). This has resulted in growing value consciousness and the modern day consumer being much more discerning about where and how they spend their money (Pantene Case Study 2010; Naidoo 2011).

Firms are also tightening up their marketing budgets and are wanting advertising agencies to justify their spend and fees by making use of promotional activities that are measurable and quantifiable as opposed to mass-media marketing techniques which were popular in the past (Koenderman 2008). According to Peattie and Peattie (1993) and Koenderman (2008), below-the-line promotional activities are beginning to attract more attention and, accordingly, are being granted more marketing expenditure than above-the-line promotional activities. Abratt, Bendixen and du Plessis (1995) made mention that firms are focusing their resources on promotional activities that generate immediate sales in order to meet their budgets, and are spending much less on long-term brand building. This was also emphasised by Koenderman (2008). Koenderman (2005) stated that the main objective of doing business today is to get an immediate response from consumers.

It is important that marketers become innovative in their methods of attracting the attention of potential consumers of the brands that they are representing by tailoring and targeting promotional activities appropriately (Peattie and Peattie 1993; Carlson and Parrack 2009). Marketers need to understand and listen to the needs of the consumers that they are targeting in order to determine the right mix of promotional activities that will lead to a successful sale, with creative excellence being the key to success (Koenderman 2005). Customer insight, together with the economic conditions that the aforementioned are confronted with on a daily basis, are driving firms away from a one-size-fits-all mentality (Moore 2008). Thus, marketers need to tailor their promotional activities to their target market taking race, age, gender and levels of experience into account (Cramphorn 2011).

The modern day woman is educated, earns her own money and has considerable purchasing power (Barletta 2003). Women drive the world economy and control approximately $20 trillion in consumer spending worldwide (Silverstein and Sayre 2009). In South Africa alone, black women spent R120 billion in 2008, which is 40% of the total amount spent by women annually (van Zyl 2011). Moriarty (2011) describes women as the new emerging market as they account for almost 83 percent of all consumer purchases. Women are, thus, today's greatest marketing opportunity and promotional activities need to be tailored to influence their decision making processes (Silverstein and Sayre 2009).

In considering women as today's greatest marketing opportunity, in particular pregnant women, it is obvious that this is a market yet to be fully exploited in South Africa. Pregnant women are extremely demanding, as they want to give their babies the best and are willing to spend a little more for products for their babies, even if it means that they have to do without (Miller 1996). In assessing this category of women, there are five marketing opportunities for firms wanting to sell their brands to pregnant women, namely, (i) before pregnancy; (ii) during the first and second trimesters of pregnancy; (iii) during the third trimester of pregnancy; (iv) after pregnancy i.e. during breastfeeding; and (v) for their new baby.

Thus, it is of crucial importance that marketers need to identify clearly the target markets that they are serving and adjust their promotional activities accordingly. Today's women know exactly what they want and it is the marketers' job to ensure that the needs of these women are met if they want to be successful in their marketing initiatives (Barletta 2003).

The problem which needs to be addressed by this research is to determine which mix of above-the-line and below-the-line promotional activities will be most effective in capturing the attention of pregnant women and influencing their decision making processes, which in turn will drive them to make a purchase.

1.3 Problem Statement

1.3.1 Main problem

To determine which above-the-line and below-the line promotional activities will be most effective in influencing pregnant women in their decision making processes.

1.3.2 Sub-problems

The first sub-problem is to determine which promotional activities are most likely to influence the decision making processes of pregnant women in South Africa.

The second sub-problem is to determine how promotional activities should be adapted for the various demographics, such as, race, age, income level, pregnancy status and experience of a previous pregnancy.

1.4 Significance of the Study

The study fills a gap in that marketers struggle to tailor integrated marketing communications to capture their target markets appropriately. In fact, Cramphorn (2011) claims that 80 percent of marketing messages are targeted to everyone, this assumes that there are very little differences in opinion between the genders. Similarly, the assumption is that even if a marketing message is gender specific, that no difference exists in terms of age, race and level of income. Furthermore, as of the 11th August, 2011, Statistics South Africa recorded 889 590 live births for the year, which means that the pregnancy market in South Africa is one of considerable size and opportunity. Twenty percent of these live births are within the private health care sector, which amounts to 177 918 potential marketing opportunities (Republic of South Africa 2004).

Nielsen's has conducted research into the level of trust women around the world have with regards to the various promotional activities, namely advertisements placed on TV, magazines, newspapers, the internet, via text messages, billboards and recommendations made by people the women know. The research conducted does not, however, include all the below-the-line promotional activities that are available for marketers to make use of. Furthermore, the research has not been done exclusively looking at the perceptions of women in South Africa and very little research exists which looks at the perceptions of pregnant women as the target market. No research was found on the perceptions of pregnant women in South Africa and even less so in terms of whether the experience of a previous pregnancy, race, age and income level will change the mix of promotional activities that are most effective.

In terms of the literature review, the most research that exists has been collected on the effectiveness of word-of-mouth marketing and the use of chat rooms, blogs and problem solving on the internet. Very little research has been done on promotional activities such as price / quantity promotions, competitions, sampling, use of celebrity endorsements, charity affiliations, in-store display material or in-store promoters.

This study has been conducted in order to provide guidance to marketers wanting to sell their brands to pregnant women. It enables them to decide which promotional activities are most appropriate to capture this audience's attention and influence their decision making processes.

1.5 Delimitations of the Study

- This study does not take into account differences in geographical location among the women that are being researched.

- The study focuses on the above-the-line and below-the-line promotional activities that are most effective in influencing the decision making processes of women who are not pregnant, as compared to women who are pregnant. This study does not include those promotional activities which may capture the attention of men whose partners are pregnant, and who may influence their decision making processes and purchasing behaviour.

- This study is only aimed at women regarded to be medium to high income earners and who have sufficient purchasing power to purchase private healthcare. This only includes 20% of the South African population and thus cannot be generalised across the whole population.

1.6 Definition of Terms

Above-the-line promotional activities: refer to mass-media marketing such as, adverts on television, on the radio and in magazines (Carlson and Parrack 2009).

Below-the-line promotional activities: refer to marketing initiatives, such as, in-store promotions, competitions, discount vouchers and personal selling (Carlson and Parrack 2009).

Brand: this includes any product or service that requires marketing in order to be sold.

1.7 Assumptions

- The experience of a previous pregnancy may alter the modes of marketing communication that attract the attention of pregnant women. Women who have had a previous pregnancy already know, and have experience, in which brands are best to use.
- That respondents correctly identify their demographics such as income level and age group.
- That sufficient numbers of respondents participate in the study.
- The person who actually makes the purchase is assumed to be the same person who makes use of, or consumes, the product.

CHAPTER 2: LITERATURE REVIEW

2.1 Introduction

This literature review aims to summarise prior research that is available on effective marketing to women and pregnant women in South Africa and internationally.

The literature review –

- begins with a number of different definitions of what constitutes marketing;
- provides insight into consumer behaviour and how it influences the buying process;
- investigates the promotional activities available for marketers to make use of for the aforementioned target market; and
- determines which promotional activities are most effective in influencing the decision making processes of the target market.

The literature review is concluded by highlighting the research questions that this study aims to answer.

2.2 Background

Cant, Brink, Jooste, Machado and Strydom (2006: 4) defined marketing as “the process of planning and executing the conception, pricing, marketing communication and distribution of ideas, products, and services to create exchanges that satisfy individual and organisational goals”. Kotler and Keller (2009) then defined marketing as a set of processes which aims to determine and meet customer wants and needs, by communicating and delivering products and services of superior customer value. Furthermore, Hollis (2011) stated that marketing is responsible for dispersing information about a brand to potential customers. These three definitions are evidence that the definition of marketing has not changed considerably over time. There is also a common thread tying these definitions together, namely, the concept of communication, indicating that communications play an integral role in the marketing process (Ruskin-Brown 1999).

Marketers use a range of promotional activities to promote their brands in order to create sales, and thereby ensure their long-term sustainability. Thus, it is important for marketers to communicate to the potential consumers of their brands in a way that encourages a positive buying response (The Chartered Institute of Marketing 2004).

This research aims to determine the most effective above-the-line and below-the-line promotional activities that are available for marketers to use in order to influence the decision making processes of pregnant women in South Africa, taking their age, race, income levels, pregnancy status and experience of previous pregnancies into account.

2.3 Consumer Behaviour

Consumer behaviour has interested marketers for many years, and thus marketers have tried to understand what stimuli and mental processes result in a consumer making a purchase decision (Cant et al 2006). Consumer behaviour is defined as "how individuals, groups and organisations select, buy, use and dispose of goods, services, ideas or experiences to satisfy their needs and desires" (Cant et al 2006: 125).

The decision for consumers to purchase a brand is in essence a complex problem-solving process that involves a number of different factors (Boyd, Walker and Larreche 1995). Cant et al (2006) described two main groups of factors that influence consumer behaviour and their decision making processes, namely:

- Individual factors, which are essential characteristics in human behaviour and include factors such as motivation, perception, learning ability (experience), attitude, personality and lifestyle; and

- Group factors, which arise due to the need by human beings to belong and be accepted by society. This includes factors such as the individual's family, reference groups, opinion leaders, social class and cultural groups.

Gender effects, a category of individual factors, are of particular importance to marketers and are believed to commence shortly after conception and extend

throughout pregnancy (Cramphorn 2011). These gender effects centre on the way in which each gender processes information about a need and then converts it into a decision to make a purchase (Roberts 2004). For instance, women have been found to be more socially inclined than men and are more likely to ask the opinions of their friends for solutions to their problems more often (Cramphorn 2011). Furthermore, according to Barletta (2003), women tend to go through a much more complex and detailed process when making a purchasing decision. Women follow a spiral path in order to find the perfect answer to their problem by seeking information and investigating all the various alternatives, whereas men look directly for the perfect solution (Barletta 2003).

Consumers are also dynamic in their decision making processes in that they make use of both conscious and unconscious mental processes, together with their vast experiences in order to make purchasing decisions (Martin and Morich 2011).

Many theory based models have been developed, in order for marketers to try and explain the complexities of consumer behaviour and decision making (Kotler and Keller 2009). The most relevant of these models (in respect of this Research Report), is the 'Hierarchy-of-Effects Model'. This model was developed in order to explain the sequence with which the various promotional activities should be performed in order to be most effective in influencing a consumer's decision making process (Lavidge and Steiner 1961). This model can be used by marketers quite effectively in order to develop an integrated marketing campaign when combined with Kotler's (2003) 'Buyer-Readiness Stages'.

As can be seen in Figure 1 –

- In stage 1, the Cognitive stage, marketers need to embark on mass media advertising and publicity campaigns in order to increase consumer awareness and knowledge of their brands (Kotler 2003);
- In stage 2, the Affective stage, personal selling is important because it allows marketers the opportunity to convince consumers about why their brands are more favourable than the competitors (Kotler 2003); and lastly,

- In stage 3, the Behaviour stage, is when marketers must close the sale by making use of in-store promoters, sales promotions and point-of-purchase displays (Kotler 2003).

Stages	Hierarchy-of-Effects Model	Kotler's Stages of Buyer- Readiness
Stage 1: **Cognitive Stage**	Awareness ↓ Knowledge	Awareness ↓ Comprehension
Stage 2: **Affective Stage**	Liking ↓ Preference ↓ Conviction	Conviction ↓
Stage 3: **Behaviour Stage**	Purchase	Ordering ↓ Reordering

Figure 1: Sequence of Consumer Decision Making and Buying Behaviour

Source: Adapted from Lavidge and Steiner (1961) and Kotler (2003).

Therefore, the right consumer needs to be exposed to the right message, at the right time, using the right promotional activities in order to influence their buying behaviour (Kotler and Keller 2009).

2.4 Promotional Activities available to Marketers

Keller (2001) described promotional activities as the means by which marketers gain the attention of consumers and entice them to purchase their brands. Promotional activities are used by marketers in order to inform, persuade and remind potential customers about their brands (Kotler and Keller 2009). Kotler and Keller (2009) describe a number of different promotional activities which are available for marketers to use in order to spread the word to potential customers about their products and services. These promotional activities can be broadly divided into above-the-line, below-the-line and across-the-line promotional activities (Carlson and Parrack 2009).

Carlson and Parrack (2009) define above-the-line marketing as those marketing communication messages that appear on TV, the radio, the internet, cellular phones, newspapers, magazines, posters and billboards or any other mass media platform that is used to build awareness of a brand.

Below-the-line marketing is any other promotional activity, such as, merchandising, direct mail and experiential marketing that may lead to a sale (Carlson and Parrack 2009).

Research conducted in the United Kingdom and Germany, from an advertising agency viewpoint, found that below-the-line promotion should be used in conjunction with above-the-line promotion and should only occupy a supportive role (Jobber 1999).

Across-the-line marketing is a new concept and has taken over from the two aforementioned distinct marketing methods. It is an integrated approach to marketing which includes both above- and below-the-line promotional activities (Carlson and Parrack 2009). This combination of promotional activities is referred to as the communications mix (Ruskin-Brown 1999).

Kotler and Keller (2009), describe the various promotional activities as follows:

- **Mass media advertising** – Television (TV), radio, magazine, internet and newspaper advertisements, billboards and posters;

- **Public relations and publicity** – charity sponsorships, talk shows, newsletters, annual reports, authority figures and celebrity endorsements;

- **Events and experiences** – expos, trade shows and company sponsored activities;

- **Direct and interactive marketing** – product catalogues or print media, postal mailings, faxes, emails, cellular phone text messages, websites and chat rooms or blogs;

- **Sales promotion** – in-store promotions (can also include packaging and point-of-purchase displays), competitions, sampling and discounting / coupons;

- **Word-of-mouth marketing** – also known as viral marketing, chat rooms or blogs, recommendations from friends and family, as well as healthcare professionals; and

- **Personal selling** – sales presentations, sales representatives, sampling, expos and trade shows.

Keller (2001) stated that the most successful marketing campaigns are those that use a variety of different promotional activities across the various communication or media types. Furthermore, it was found that campaigns that were developed in partnership with the target consumers or with the trade were the most successful (Doyle, Bird, Appel, Parisi, Rogers, Glaros et al 2006). Kotler and Keller (2009) also emphasised the importance of ensuring that you communicate with your target market using the correct media that will attract their attention.

2.4.1 Above-the-line Promotional Activities

2.4.1.1 Mass Media Advertising

Research has shown that consumers are beginning to tune out when marketing messages appear on the TV or any other mass advertising medium as there is too much clutter and they are no longer engaged by such communications (Moses 2003).

Newspapers, a common and widely used mass media platform, which has been used since the early 1800's to capture the attention of a wide audience, has lost its uniqueness and has been eroded by innovations such as the internet (Curtis 2009). Also, of major concern to marketers, is that research has shown that the median age of certain magazines and TV programmes has increased to 45 years; this is disconcerting for marketers as these two advertising mediums are beginning to wane in popularity among the youth (Papazian 2009). Nielsen (2011), Women of Tomorrow, has found that grandmothers (women aged 47-65) are most likely to still listen to the radio for information on new products.

Nielsen (2011), Women of Tomorrow, has shown that, notwithstanding the advertising clutter on TV, women take notice of adverts on TV in order to be informed about new products. Furthermore, Nielsen (2011), Women of Tomorrow, indicates that in South Africa the top three sources of information about new brands is TV, then newspapers and lastly magazines. In another study by Nielsen (2011), Global Adview Pulse, they found that South Africa and Argentina had the highest advertising spend growth globally at 29.9 and 26.7 percent respectively, with the majority of spend in South Africa being focussed on TV.

2.4.1.2 The Internet

Since the internet boom in the 1990's, marketers have started using this platform to advertise to the masses in a relatively cost efficient manner (Mistry and Quilter 2009; Bloch 2010). This medium has become especially appealing to pregnant women who have become far more comfortable with using the internet to search for information on a variety of topics (Djukic 2001). The internet allows its users to find answers to

questions that may be too intimate or embarrassing to ask other people, or health care professionals (Djukic 2001).

Barletta (2003) describes five key components of the internet that appeal to women users – ease of communication, relevant content, commerce, community and convenience. These key components have resulted in more people using the internet in South Africa, making the internet a major platform for companies and marketers to promote their brands (Felbert 2008). Women like the internet as it allows them to build communities and share experiences, notwithstanding this, only 10 percent of women are influenced by online adverts (Nielsen 2011 – Women of Tomorrow). A global study, which was recently launched by TNS Digital Life, found that 60% of South Africans do not want firms to engage with them whilst they are making use of the internet, through social networks such as blogs and Facebook (Seery 2011). Furthermore, TNS found that only 7% of South Africans make brand comments and only 4% will make purchases on the internet (Seery 2011).

2.4.1.3 Celebrity Endorsements

Celebrities are being used by many companies, especially sports apparel and fast moving consumer goods manufacturers to create a “buzz” about their products (Tiwari and Abraham 2010; Brajesh and Gouranga 2011). However, research into this topic has found conflicting opinions of whether celebrities are worth their investment (Alnawas 2010).

Tiwari and Abraham (2010) found that celebrity endorsements may result in the following benefits for advertisers, namely, brand loyalty, advertisement acceptance, better brand reputation and increased purchase intentions. However, this was contradicted by research conducted by Alnawas (2010) who found that celebrities may be used to increase brand awareness but do not necessarily influence consumer purchasing behaviour.

2.4.1.4 Charity Affiliations

Cause related marketing (CRM), is marketing by a firm that makes use of a charity to increase their revenue at the same time as creating benefit for that charity (Farache, Perks, Wanderley and de Sousa Filho 2008). Farache et al (2008) conducted a study

where they looked at consumers' perceptions of the alliance between firms and charities. They found that consumers were happy to support firms who worked with charities as it is for the greater good of society, especially when it was in support of charities for children. This was then reconfirmed by Silverstein and Sayre (2009), who found that women prefer to purchase brands from companies that are charitable, especially those that help other women and children.

Thus, brands that promote well-being, conserve the environment, provide education and care for the needy will prosper (Silverstein and Sayre 2009). Farache et al (2008) also found that CRM can even cause consumers to switch brands in order to support a particular charity.

2.4.2 Below-the-line Promotional Activities

2.4.2.1 Sales Promotion

Sales promotions have been known to increase a brand's short-term sales through price discrimination and brand trial, but the long-term effects are not clearly understood (Peattie and Peattie 1993; Chandon, Wansink and Laurent 2000). Consumers can benefit from sales promotions, not only by saving money but also through hedonic (value expression, entertainment and exploration) and utilitarian (product quality and shopping convenience) effects, as well as by reducing search and decision costs (Chandon et al 2000). Younger women are most influenced by sales promotions and will often shop around to get the best deal and try out new products (Nielsen 2011 - Women of Tomorrow). Sales promotions can take place in many ways, namely price / quantity promotions or the incentive to be able to enter a competition after making a product purchase.

2.4.2.1.1 Price / Quantity Promotions

Promotions are perceived by consumers as advantageous in that they deliver extra value for the customer (Peattie and Peattie 1993). A disadvantage of pricing promotions, in the form of discounts, coupons or bulk purchasing has resulted in intense price wars between brand manufacturers, which in turn has led to reduced margins for everyone in the distribution chain (Abratt et al 1995). Price driven

promotions can also damage the image of a brand and result in consumers who are reluctant to purchase the product once the price increases again (Jobber 1999).

2.4.2.1.2 Competitions

In-store competitions can be used by marketers as a sophisticated weapon, to attract new users and to increase usage by repeat customers (Peattie and Peattie 1993; Jobber 1999). Competitions are an innovative way of increasing awareness and purchases of a product without disrupting the price / quantity equation of a brand (Peattie and Peattie 1993). Competitions can also be used to smooth the peaks and troughs which are common with brands that follow a cyclical / seasonal demand pattern (Peattie and Peattie 1993). Competitions provide marketers the unique opportunity of revamping packaging material as well as increased point-of-sale opportunities and interesting display material (Peattie and Peattie 1993; Jobber 1999).

Competitions do, however, come with their risks, from a consumer's perspective they could associate the product with losing and a feeling that they have been entrapped by the marketer (Peattie and Peattie 1993). Whereas, from the marketer's perspective, the competition could elicit a poor response which could waste valuable company resources (Peattie and Peattie 1993).

2.4.2.2 Sampling

Sampling is one of the best ways of getting a consumer to test your product, but this method of marketing can be quite expensive (Jobber 1999). Research done by Miller (1996) showed that being able to see and touch the actual product before purchasing it was important to women. Sampling is used most effectively when the customer has no experience with the product and is able to test the product with limited risk (Herbst and Harold 2007). A study undertaken in the United States of America (Wu 2010) found that sampling created more awareness of products that consumers have not heard of before and that consumers are more likely to purchase an expensive product if they were given a sample to test first.

2.4.2.3 Word-of-Mouth Marketing

"Word-of-mouth advertising involves activities to encourage consumers to talk about a product or company to friends and neighbours, setting in motion a chain of communication that could spread through a whole market" (Mason 2008: 207). Word-of-mouth marketing can take many forms, such as, conversations between people about brand recommendations, it can occur as a chat room, on a blog on the internet or via online consumer reviews. It involves authority figures or opinion leaders spreading information about a brand (Mason 2008).

Word-of-mouth marketing is important to women because they begin their purchasing process by collecting information from friends and family who have had previous experience with the brand, as these communications are associated with greater trust and the power of endorsement (Bayus 1985; Barletta 2003; Mitchell 2003). The most trustworthy source of word-of-mouth marketing as perceived by consumers is recommendations by healthcare professionals such as doctors, nurses or pharmacists (Pekala 2011). It is at this stage of the purchasing decision that word-of-mouth communications can be very useful to marketers. Word-of-mouth marketing is free from the clutter that is common in most mass advertising media; it is more direct and more personal (Plummer 2007). Women like online chat groups as these forums facilitate brand communications (Barletta 2003).

Ainsworth (2007) stated that 78% of consumers from around the globe felt that word-of-mouth communications from friends and family are much more trustworthy sources of information than any other communication medium. This was then reaffirmed by a follow-up survey done by Nielsen in 2011 which found that 82 percent of women in emerging markets trusted brand recommendations from people they knew (Nielsen 2011 – Women of Tomorrow).

Another type of word-of-mouth marketing, online consumer reviews provide information about a brand from a user's perspective and can assist consumers in finding brands that meet their needs (Chen and Xie 2008). This type of brand information is considered to be far more reliable and valuable, especially to unsophisticated consumers (Chen and Xie 2008). This notion was reaffirmed by Mason (2008) who felt that word-of-mouth communications were important in under-

developed or developing markets, such as South Africa, where consumers were less sophisticated or literate. These product reviews can, however, be damaging to a brand's image if the reviews have not been properly screened, if the reviews do injustice to unique product attributes or if there are a large number of expert consumers of the brand (Chen and Xie 2008; Mason 2008).

Word-of-mouth communications are beneficial to marketers in that it is relatively cheaper than mass media advertising and tends to be easier and quicker to execute. It may, however, be difficult to quantify and the results may be unpredictable, which increases its inherent risk (Mitchell 2003; Mason 2008; Trusov, Bucklin and Pauwels 2010). Bayus (1985) felt that word-of-mouth advertising could not completely replace mass media advertising as it played a role in stimulating word-of-mouth communications.

In the South African context, it was found that word-of-mouth marketing works well among black middle class women, as it is a very important part of their culture (van Zyl 2011). Furthermore, research undertaken by Millward Brown found that 80% of South Africans will make product recommendations, as compared with 69% from the rest of the world (van Zyl 2011).

2.4.2.4 Direct Marketing

Direct marketing can take the form of emails, faxes, text messages, telemarketing or even catalogues received via post. Catalogues and unsolicited commercial emails ("spam") have become extremely popular techniques for marketers to make use of as they are relatively cost effective and easy to execute (Morimoto and Chang 2006).

Emails are, however, the most popular and are used to reach a much wider audience in a more cost effective manner than posting brand catalogues (Morimoto and Chang 2006). Consumers have, however, started to become resentful towards email advertising and are regarding such emails as "spam" (Morimoto and Chang 2006). Furthermore, consumers feel that email adverts are intrusive, untargeted, useless and irritating as they clog up their mail boxes and waste their time having to screen messages to determine which are safe (Morimoto and Chang 2006).

2.4.2.5 Loyalty Programmes

Loyalty programmes can take the form of frequency programmes or club marketing programmes (Kotler and Keller 2009). Both programmes offer members some form of added value that is beneficial to the customer (Kotler and Keller 2009). Loyalty programmes have been used successfully by retailers in order to increase customer lifetime value and satisfaction (Gull and Tariq 2011). Furthermore, loyalty programmes are beneficial to retailers in that they help to retain current customers, promote brand loyalty and attract new customers (Gull and Tariq 2011). Customer loyalty is important to marketers as it is up to five times more expensive to capture the attention of new customers than retaining satisfied customers (Kotler and Keller 2009). Research has shown that customers are more likely to make purchases from stores that have some form of loyalty scheme attached to it, especially if the benefits of the scheme translate into hard cash rather than the softer benefits (Cuneo 1998).

2.4.2.6 Attractive Packaging

Product packaging is almost as important as the product itself as it is the first impression that a consumer has of the product that matters (Kotler and Keller 2009). Furthermore, packaging can be used to build brand equity and even drive sales (Kotler and Keller 2009). The retail stores are saturated with a large variety of products and thus marketers have to be innovative in the packaging designs to attract the attention of consumers (Doyle et al 2011). Consumers base their decisions on which products to buy based on the perception they have of the product packaging (Goodenough 2006).

2.5 Conclusion of Literature Review

In conclusion of the literature review, there are a multitude of promotional activities that marketers can make use of to try and sway consumers to use their brands. However, promotional activities are costly to firms and with the economic downturn still looming in South Africa, marketers are faced with a dilemma when choosing which promotional activities will be most effective in influencing the decision making processes of their intended target market. Furthermore, marketers are being forced to make use of those promotional activities that can produce instant and measurable

results and thus the choice of which ones to use can be daunting. Naik and Raman (2003) stated that synergy was achieved by using multiple promotional activities and advertising platforms. This was also affirmed by Schultz (2004) who observed that a combination of promotional activities work better than using any single promotional activity alone.

Following the literature review, two research questions have been formulated to address the difficulties that marketers are faced with regards to the most effective mix of promotional activities.

2.5.1 Research Question 1

Which promotional activities are most likely to influence the decision making processes and attract the attention of pregnant women in South Africa?

Based on the literature review we are likely to see the following promotional activities being most popular among pregnant women in influencing their decision making processes, namely –

- The internet, such as, online customer reviews, chat blogs and company websites. This is due to the ease and convenience with which women can access the internet in the privacy of their own homes (Barletta 2003);
- Word-of-mouth marketing, as women begin their purchasing process by collecting information from trusted friends, family and healthcare professionals who have had previous experience with the brand (Bayus 1985; Barletta 2003; Mitchell 2003; Pekala 2011).
- Charity affiliations, as women prefer to purchase brands from companies that are charitable, especially those that are looking after less fortunate women and children (Silverstein and Sayre 2009); and
- Sampling, as this allows women to see, touch and try the actual product before purchasing it (Miller 1996).

2.5.2 Research Question 2

How will demographic factors such as race, age, income level, pregnancy status and the experience of a previous pregnancy change the promotional activities needed to influence the decision making processes of pregnant women in South Africa?

The literature review has revealed that demographics such as age, race and pregnancy status may have some influence on the promotional activities that are favoured, namely –

- Younger women, seem to be the most influenced by sales promotions, shopping around to get the best deal on products (Nielsen 2011 – Women of Tomorrow);
- Pregnant women, make use of the internet to search for answers, to pose questions, as well as gather information on products that other women have had experience with (Djukic 2001);
- Older women, who are over the age of 45 years, will most likely favour TV, magazine and radio adverts to find information on new products (Papazian 2009; Nielsen 2011– Women of Tomorrow); and
- Black middle class women, who rely heavily on word-of-mouth product recommendations, which is an important part of their culture (van Zyl 2011).

Furthermore, consumer markets can be segmented using a number of other descriptive characteristics or bases rather than demographics, such as geographical location, psychographics and even behaviour (Kotler and Keller 2009). The Unilever Institute of Strategic Marketing in Cape Town has identified one such unique base, namely gender segmentation (Kotler and Armstrong 2010). Gender segmentation has delineated four female market segments in South Africa using gender segmentation bases, namely –

- Conservative / traditional black females: these women are hindered by their financial and cultural constraints;
- Conservative / traditional white females: these women are suppressed due to their belief that they are inferior to men and should listen to them;

- Young black women: these women are independent, successful and have an internal locus of control; and
- Young white women: these women are independent and career-oriented but are still held back by gender role stereotypes.

It is thus essential that marketers understand the various segmentation bases that are most likely to have an influence on the decision making processes of women in South Africa (Kotler and Armstrong 2010). Accordingly, a number of these segmentation bases are expected to become apparent when analysing the responses of the Quantitative Online and Intercept Surveys.

CHAPTER 3: RESEARCH METHODOLOGY

Primary data sources have been used to conduct this research, namely, online surveys, intercept surveys and personal interviews. Primary data collection is, however, time consuming to collect and, thus, expensive, whereas; secondary data is cheaper, easier and faster to collect (Cant et al 2006).

The main objective of this research is to determine which mix of promotional activities is most effective in influencing the decision making processes of pregnant women within South Africa. Furthermore, it is of considerable interest to marketers whether women, especially pregnant women, can be grouped as a single homogenous group or whether promotional activities need to be specifically tailored according to pregnancy status, the experience of a previous pregnancy, race, age and income level.

This study is going to attempt to determine the most effective promotional activities, in order to develop an integrated marketing campaign targeted to reach medium to high income earning pregnant women within South Africa, who fall within the private healthcare sector. This is from -

A consumer's perspective –

- Quantitative in nature and in the form of online and intercept surveys with closed-ended structured statements; and
- Qualitative in nature via personal interviews.

The trade's perspective –

- Qualitative in nature in the form of an open-ended interview with structured questions.

Quantitative consumer surveys have been used in conjunction with qualitative marketer interviews from the trade in order to compensate for the limitations of each method and provide the researcher with a more in-depth perspective on the topic from two completely different positions and sources (Kalof, Dan and Dietz 2008). This method of analysis is known as triangulation, which aims to investigate a

research study using multiple techniques to derive a better understanding of the topic or concept (Kalof, Dan and Dietz 2008).

The quantitative online consumer surveys were conducted before the qualitative personal interviews with the consumers and the trade in order to establish, in general, which promotional activities are most likely to influence their decision making processes. The reason for conducting the quantitative surveys before the qualitative interviews was in order to prevent any researcher bias towards any of the promotional activities, as well as to provide direction for the qualitative consumer interviews.

3.1 Consumer Study

3.1.1 Research Methodology

The consumer study has been undertaken using a two-pronged approach; namely:

- Online and intercept surveys; and
- Personal interviews.

3.1.1.1 Online and Intercept Surveys (Quantitative)

Quantitative research allows a researcher to measure the attitudes and preferences of consumers using closed-ended or predetermined questions (Cresswell 2003). Pursuant to this, quantitative research in the form of online and intercept surveys has allowed the researcher to analyse the perceptions of pregnant women in South Africa in respect of the various promotional activities available to marketers.

The respondents to the online and intercept surveys completed the survey using a set of predetermined closed-ended statements, and had no opportunity to give any feedback in their own words and thus their deeper motivations; feelings and thoughts have not been taken into account.

Survey questionnaires are indirect data sources as respondents are asked to answer the questions in their own personal setting without being observed by a researcher

and thus their true reaction towards each statement may not be fully understood (Kotler and Keller 2009).

Table 1: The Advantages and Disadvantages of Online Research

Advantages	Disadvantages
Online research is relatively inexpensive to send out to respondents.	The number of respondents may be small because there is no one chasing the respondents to send back their questionnaires.
Online research allows for a greater consumer reach and number of respondents.	It may be quite expensive to design the online research tool and requires a high level of skill.
Respondents tend to be more honest because they are able to respond more privately than with personal surveys.	It would be difficult to follow up with respondents if their comments were misunderstood, especially if the research was conducted anonymously.
Allows for speed of data collection and analysis.	Not everyone has access to the internet.
	Will not be able to observe consumers' attitudes and motivations to each of the questions.

Source: Kotler, P. and Keller, K. (2009) Marketing Management, 13th ed., Ch4, p128-157.

3.1.1.2 Personal Interviews (Qualitative)

Qualitative research allows the researcher to make use of open-end questions in order to gain a deeper understanding of the respondents' thought processes, opinions and reasoning (Creswell 2003). Personal interviews have been conducted with eight of the respondents who participated in the quantitative study in order to gain a better understanding of what motivated them to answer the questions in the way that they did.

Table 2: The Advantages and Disadvantages of Personal Interviews

Advantages	Disadvantages
Allows the researcher to probe the respondent for more details in order to understand their opinions and motives.	There is a possibility of interviewer bias.
Suitable for open-ended and complex questions.	Respondents may feel uncomfortable to respond to certain questions, and could be seen as an invasion of their privacy.
No time lags, instant responses.	High level of technical skills required to conduct an interview.
	Can be costly and time consuming for both the respondent and interviewer.

Source: Cant, M., Brink, A., Jooste, C., Machado, R. and Strydom, J. (2006) Essentials of Marketing, 2nd ed., Ch3, p105.

3.1.2 Research Design

3.1.2.1 Online and Intercept Surveys

Surveys have been used in this research report because they allow the researcher to gather information about consumers in terms of their perceptions, attitudes, beliefs, knowledge and satisfaction (Kotler and Keller 2009). The survey consists of a structured set of questions and is opinion based (Cant et al 2006). Surveys are useful in that they present the respondents with a standard set of questions, which leads the consumer into responding in a certain pre-determined way (Hopkins 2000).

Table 3: The Advantages and Disadvantages of using Surveys

Advantages	Disadvantages
Reasonably quick to collect data.	If questions are ambiguous, then the data may be meaningless.
Standard set of questions.	Convenience samples might be used which cannot be generalised across the population.
Easy to analyse data using statistical programmes.	Poor response rate. Surveys can cause irritation and can be ignored.
Ability to sample a large population quite easily and cost effectively.	

Source: Kalof, L., Dan, A. and Dietz, T. (2008) Essentials of Social Research, Ch14, p118-137.

3.1.2.2 Personal Interviews

Personal interviews were conducted with eight of the respondents who participated in the online and intercept surveys. The interviews were semi-structured in that the respondents were requested by the researcher to give reasons why they ranked the promotional activities the way they did in section 3 of the questionnaire for the online and intercept consumer survey.

3.1.3 Population and Sample

3.1.3.1 Population

The population for the online and intercept consumer survey included any female who had access to the internet and / or who fell within the private healthcare sector within South Africa. The respondents needed to be at least of childbearing age and could reside anywhere within South Africa. This research was open to all races and applied to middle and upper income earners.

3.1.3.2 Sample and Sampling Method

The sample that was used for the online and intercept consumer surveys needed to be representative of the population in terms of pregnancy status, race, age and income level and be able to be generalised across the population (Hopkins 2000).

The participants in the research were selected randomly, in order to prevent selection bias (Hopkins 2000). As a result, 292 respondents were used for this research report in order to ensure statistical significance.

A pilot study consisting of five respondents was conducted to ensure that the questions contained in the survey were clearly understandable and unambiguous. This pilot study was also undertaken to test the reliability of the survey, as well as to provide any corrections needed (Hopkins 2000; Kalof, Dan and Dietz 2008). The pilot study however, was not entirely successful as a large number of respondents to the survey still answered section 3 of the questionnaire incorrectly and this section must have contained some ambiguity.

A large sample was required for this study due to the large number of variables. According to Hair, Black, Babin and Anderson (2010), there should be at least five times the amount of observations as compared to the number of variables.

In order to get sufficient respondents to partake in this survey, the participants were given the chance of winning one of five prizes to the value of R2000 each. The terms and conditions for entering this competition were set out on Georen Pharmaceuticals' website.

3.1.4 The Research Instrument

The research instrument was a questionnaire broken down into 3 sections. The questionnaire was original in that it was designed by the researcher and based on the information contained in the literature review.

The three sections of the quantitative questionnaire were as follows:

- Section 1: Respondent Demographics – which allowed the researcher to categorise the females participating in the study into race, age, income level and

pregnancy status. This enabled the researcher to determine whether demographics had an influence on the decision making processes of the female respondents. This data was captured as categorical data.

- Section 2: Consisted of 15 statements on a five point Likert scaled answer format.
- Section 3: Consisted of 10 promotional activities that needed to be ranked in ascending order i.e. 1 being the most important, to 10 being the least important in influencing the respondents' decision making process. This section was then used to lead the personal interviews.

See Appendix "A" for the Quantitative Online and Intercept Consumer Survey.

3.1.5 Procedure for Data Collection

The survey questionnaire was posted on Georen Pharmaceuticals' website using SurveyMonkey and a letter was sent to their database of customers to assist with the research. The respondents were given until the end of December 2011 to complete the survey and send it back to the researcher in order to take part in the competition and be included in the research.

3.1.6 Data Analysis and Interpretation

3.1.6.1 Quantitative Online and Intercept Survey

The data that was received from the survey questionnaire was analysed and interpreted accordingly:

Section 1 – Demographics

The demographics were analysed using descriptive statistics in NCSS to determine the number of participants in the study, their races, age groups, income levels and pregnancy status, respondents were then grouped accordingly.

Section 2 – 15 Likert Scaled Statements

Of the 15 Likert scaled statements, three statements needed to be reversed (R), namely statements 1, 8 and 13. This was to ensure that all statements were being

answered in the same direction, i.e. below-the-line versus above-the-line, to allow for accurate statistical analysis.

All the Likert scaled statements were analysed using descriptive statistics in order to determine the mean of each statement, the most common response and the frequency of the most common response.

These statements were analysed using -

(i) Exploratory Factor Analysis, which is a technique which aims to examine how underlying constructs influence the inter-relationships among a number of variables (Hair et al 2010). Factor Analysis is a helpful technique as it allows a researcher to summarise the information that is contained in a number of variables without losing its value (Hair et al 2010). The main reason for doing Exploratory Factor Analysis is to explain the underlying structure among the variables being analysed, namely, above- and below-the-line promotional activities and to observe if any groupings exist (Hair et al 2010); and then

(ii) K-means Cluster Analysis, a type of multivariate technique which was used to group individuals in such a way that similarities existed in each cluster, i.e. that each cluster is homogenous and that differences exist among the clusters (Hair et al 2010).

Section 3 – Ranked Statements

The ranked statements were analysed using an Analysis of Variance (ANOVA) technique available for balanced data in NCSS, known as the Friedman's two-way analysis of variance by ranks. ANOVA is a technique which enabled the researcher to determine whether the means between the various promotional activities were significantly different from each other (Hair et al 2010). This test is useful for data that is not normally distributed or has only rank order (Hintze 2007).

3.1.6.2 Qualitative Personal Consumer Interviews

The personal interviews held with the consumers were analysed using content analysis to determine whether any common themes or patterns were recognisable in the data (Weber 1990). A frequency analysis was also performed on each common theme to determine its relative weighting and importance to this study.

3.2 Trade Study

3.2.1 Research Methodology

Qualitative research has allowed the researcher to ask marketers from the trade open-ended in-depth questions about their perceptions, which is advantageous in that it allows flexibility in answering questions (Kalof, Dan and Dietz 2008). It also provides a better understanding of the interviewee's motivations, as they were able to express themselves in their own words (Kalof, Dan and Dietz 2008).

Personal interviews can, however, be time consuming, expensive and may be prone to interviewer bias (Kotler and Keller 2009).

3.2.2 Research Design

Personal interviews have been conducted with five companies from the trade who are currently marketing their brands to pregnant women in South Africa. These interviews were conducted by the researcher using a predetermined set of open-ended standard questions.

3.2.3 Population and Sample

3.2.3.1 Population

The personal interviews were undertaken with five marketers from the trade who specifically market their products to pregnant women in South Africa.

3.2.3.2 Sample and Sampling Method

The sample that was used from the trade included five personal interviews with companies who have had experience in marketing their brands to pregnant women within South Africa.

3.2.4 The Research Instrument

This section of the research took the form of a personal interview with a standard set of pre-determined open-ended questions.

See Appendix “B” for the Qualitative Personal Interview Questionnaire for the Trade.

3.2.5 Procedure for Data Collection

Personal interviews were set up with the five marketers from the trade, who were interviewed according to a set of pre-determined open-ended questions.

3.2.6 Data Analysis and Interpretation

The personal interviews with the trade were analysed using content analysis. Content analysis aims to summarise open-ended questions by determining whether common themes or insights exist among the data (Weber 1990).

3.3 Limitations of the Study

Limitations for this research include the following:

- The study is only looking at the perceptions of middle to upper income earners within South Africa, which is only a very small portion of the total population.
- A number of other factors may influence a pregnant woman’s perception of the most effective promotional activities such as buying power, culture, nationality, her husband and even religion.
- The study will not be able to determine whether a positive consumer perception of a promotional activity will indeed lead to a successful purchase.

3.4 Reliability and Validity

Validity is the ability of a research instrument to measure exactly what it is supposed to measure and address the problems that you need it to address (Cant et al 2006). Validity will be measured by performing a pilot study first with both the consumer survey and the personal interview for the trade before proceeding with the study. Triangulation will also allow the findings to be valid if the information reveals consistent findings, and thus will allow a researcher to be more confident about his conclusions (Kalof, Dan and Dietz 2008).

Reliability on the other hand, has to do with accuracy and precision and the ability of that instrument to produce consistent, stable results that are identical with repeated use (Cant et al 2006). Reliability of this research will be ensured by having a large sample size of consumers who will respond to the survey and having multiple question types asking the same sort of questions (Kalof, Dan and Dietz 2008).

3.4.1 External Validity

External validity means that the research findings are appropriate and are able to be generalised beyond the sample and to the rest of the population (Kalof, Dan and Dietz 2008). This research is externally valid as a large number of respondents participated in the survey.

3.4.2 Internal Validity

Internal validity is defined as whether the statements / questions in the research are providing relevant conclusions from the findings (Kalof, Dan and Dietz 2008). Internal validity has been determined by making use of the pilot studies first on the survey and personal interview questionnaires.

3.4.3 Reliability

This research is reliable as there is a large pool of respondents participating in the study. There is also a mix of respondents from each of the race groups, age groups, income levels and pregnancy status, thereby ensuring consistency.

CHAPTER 4: PRESENTATION OF RESULTS

4.1 Introduction

The results of the research report have been divided into three sections and are presented as such:

- Quantitative Consumer Surveys
- Qualitative Consumer Interviews
- Qualitative Trade Interviews

4.2 Quantitative Consumer Surveys

4.2.1 Demographic Profile of Respondents

The quantitative consumer surveys were distributed and completed during November and December 2011 as follows:

- Sent via email Georen Pharmaceuticals' database of female customers via SurveyMonkey;
- Posted on Georen Pharmaceuticals' website and recorded using SurveyMonkey; and
- Intercept surveys were conducted with 59 women at the Baby Expo which was held at the Northgate Coca-Cola Dome in November 2011.

A total of 364 quantitative surveys were collected. However, 72 respondents had to be removed from the study, 18 of which were male (this study was directed at females not males) and the other 54 had only completed the demographic section of the survey. Thus, a final total of 292 quantitative surveys could be analysed further.

<u>Table 4:</u> Demographic Profile of Respondents to the Quantitative Online and Intercept Consumer Surveys

Race		Age		Income Level		Women who are pregnant	Women who have children
White (69.18%)	202	15-24 25-34 35+	8 140 54	<R7,999 R8,000-R19,999 R20,000-R39,999 R40,000+ Unallocated	10 48 86 54 4	51	126
Black and Coloured (18.15%)	53	15-24 25-34 35+	7 39 7	<R7,999 R8,000-R19,999 R20,000-R39,999 R40,000+ Unallocated	13 17 14 7 2	15	34
Indian and Asian (12.67%)	37	15-24 25-34 35+	3 26 8	<R7,999 R8,000-R19,999 R20,000-R39,999 R40,000+ Unallocated	3 15 11 5 3	12	25
Total	**292**		**292**		**292**	**78**	**185**

The following categories needed to be grouped together due to small sample size leading to significance problems during analysis:

- Races, Black and Coloured have been grouped together into one category called “Black and Coloured”.
- Races, Indian and Asian have been grouped together into one category called “Indian and Asian”.
- Age groups, 35-49 and 50+ have been grouped together into one category called “35+”.
- Income levels, below R2,500; R2,500-R4,999 and R5,000-R7,999 have been grouped together into another category called “less than R7,999”.

- Income levels, R8,000-R10,999 and R11,000-R19,999 have been grouped together into another category called “R8,000-R19,999”.
- Income levels, R20,000-R29,999 and R30,000-R39,999 have been grouped together into another category called “R20,000-R39,999”.
- Income levels, R30,000-R39,999 and R40,000-R49,999 have been grouped together into another category called “R40,000+”.

4.2.2 Likert Scaled Statements

Respondents were requested to indicate their level of agreement or disagreement with 15 statements on a five point Likert scale, from “Strongly Disagree” being assigned a value of (1) to “Strongly Agree” being assigned a value of (5). Questions 1,2,4,5,8,12,13,14 and 15 were designed to compare one type of promotional activity to another type. This was done in order to get an idea of which promotional activities are most effective in influencing the decision making processes of women, in particular, pregnant women, when making the decision to purchase a fast moving consumer good e.g. a nutritional supplement, nappies, food items etc.

There were three reversed items in the survey questionnaire (questions 1 , 8 and 13), these were all captured in their un-reversed state and then reversed during their analysis in order to ensure that all questions were being answered in the same direction i.e. below-the-line as compared to above-the-line promotional activities. This was also done to ensure that there was consistency in the data.

Questions 3,6,7,9,10 and 11 were designed in order to get an idea of consumer preferences with regards to promotional activities that can be considered as being quite similar i.e. adverts in catalogues as compared with adverts received via email.

A total of 292 respondents completed this section of the survey. Missing values were excluded from the analysis and not taken into account.

The Likert Scaled Statements were analysed in three ways, namely:

- Descriptive Statistics, using NCSS (Number Cruncher Statistical Systems), in particular, looking at the means of each statement;

- Exploratory Factor Analysis, using SAS, in order to reduce the number of variables into a smaller set of factors which still maintained the same level of information (Hair et al 2010); and
- K-Means Cluster Analysis, using NCSS, to group respondents into homogenous clusters of consumers with similar preferences with regards to the influence of promotional activities on their decision making processes (Hair et al 2010).

4.2.2.1 Descriptive Statistics

Descriptive statistics were run on all 15 statements using NCSS in order to determine the relative importance of each statement to the study, the mean of each statement, the most common response for each statement and the frequency of the most common response.

Frequency was used when analysing the descriptive statistics in order to determine the number of times that a specific outcome occurred for each statement i.e. how many times the most frequent response was chosen (Wegner 2003).

See Table 5 for a Summary of the Descriptive Statistics, Mean and Frequency Comparison of Likert Scaled Statements.

Key:

*R – denotes a reversed statement.

Table 5: Mean and Frequency Comparison of Likert Scaled Statements

No.	Statements	Mean	Most Common Response	Frequency
1R*	Friends and family vs mass media advertising	3.25	4	139 (48%)
2	Doctor recommendations vs TV adverts	4.38	5	141 (48%)
3	Product demonstrations vs internet purchases	3.84	4	132 (45%)
4	Friends and family vs celebrity endorsements	4.24	4	132 (45%)
5	Competitions vs charity donations	2.90	2	95 (33%)
6	In-store promotions vs text message adverts	3.76	4	141 (48%)
7	Discounts vs samples	3.13	2	90 (31%)
8R*	Email adverts vs newspaper adverts	3.35	4	134 (46%)
9	Loyalty programmes vs friends and family	2.95	2	100 (34%)
10	Catalogue adverts vs email adverts	2.92	2	106 (36%)
11	Online product reviews vs doctor recommendations	2.28	2	136 (47%)
12	Exhibitions vs magazine adverts	3.60	4	147 (50%)
13R*	Price promotions vs TV adverts	3.38	4	132 (45%)
14	Attractive product packaging vs magazine adverts	2.99	2	96 (33%)
15	Samples vs internet adverts	4.14	4	161 (55%)

See Appendix “C” (Table 29 and Table 30) for the comprehensive detail to Table 5.

As can be seen in Table 5, the following statements appear to be most highly rated -

- Statement 1R*: even though the mean was only 3.25, 48% of respondents rated the reversal of this statement a '4' (agree). Thus, recommendations by friends and family are likely to influence the decision making process of women.
- Statement 2: had a mean of 4.38 with 48% of respondents rating this statement a '5' (strongly agree). Thus, recommendations from healthcare professionals are likely to influence the decision making processes of women.
- Statement 3: even though the mean was only 3.84, 45% of respondents rated the statement a '4' (agree). Thus, in-store product demonstrations are likely to influence the decision making processes of women.
- Statement 4: had a mean of 4.24, with 45% of respondents rating this statement a '4' (agree). Thus, recommendations from friends and family are likely to influence the decision making processes of women. This confirms the findings as per the reversal of statement 1.
- Statement 6: even though the mean was only 3.76, 48% of respondents rated it a '4' (agree). Thus, in-store promoter demonstrations of products are likely to influence the decision making processes of women. This confirms the findings as per statement 3.
- Statement 8R*: even though the mean was only 3.35, 46% of respondents rated the reversal of this statement a '4' (agree). Thus, email adverts are likely to influence the decision making processes of women.
- Statement 11: had a mean of 2.28, with 48% of respondents rating this statement a '2' (disagree). Thus, recommendations from healthcare professionals are likely to influence the decision making processes of women. This confirms the findings as per statement 2.
- Statement 12: even though the mean was only 3.60, 50% of respondents rated this statement a '4' (agree). Thus, product exhibitions are likely to influence the decision making processes of women.
- Statement 13R*: even though the mean was only 3.38, 45% of respondents rated the reversal of this statement a '4' (agree). Thus, in-store pricing promotions are likely to influence the decision making processes of women.
- Statement 15: had a mean of 4.14 with 55% of respondents rating this statement a '4' (agree). Thus, free product samples are likely to influence the decision making processes of women. Statement 15 had the highest overall percentage of

respondent agreement.

4.2.2.1.1 Summary of Findings from the Descriptive Statistics

Table 6 summarises the key influencers from a consumers' perspective as per the findings of the descriptive statistics section of analysis.

Table 6: Key Influencers from a Consumers' Perspective as per Descriptive Statistics

Statements	Promotional Activities	Reason
1R*; 4	Recommendations by friends and family	(1R*) 48% Agree; 9% Strongly Agree (4) 45% Agree; 42% Strongly Agree
2; 11	Recommendations by healthcare professionals	(2) 44% Agree; 48% Strongly Agree (11) 47% Agree; 21% Strongly Agree
3; 6	In-store demonstrations	(3) 45% Agree; 26% Strongly Agree (6) 48% Agree; 21% Strongly Agree
8R*	Email adverts	46% Agree ; 8% Strongly Disagree
12	Product exhibitions	50% Agree; 15% Strongly Agree
13R*	In-store pricing promotions	45% Agree; 10% Strongly Agree
15	Samples	55% Agee; 32% Strongly Agree

As can be seen in Table 6 above, recommendations by friends and family, recommendations by healthcare professionals, in-store demonstrations, email adverts, product exhibitions, pricing promotions and samples are the most likely promotional activities to influence the decision making processes of women.

4.2.2.2 Exploratory Factor Analysis

The Exploratory Factor Analysis was performed using SAS Business Analytics Software. Exploratory Factor Analysis has been used to reduce the fifteen variables contained in section 2 of the Quantitative Online and Intercept Consumer Survey (see Appendix "A") into a smaller, more manageable set of variables, wherein common patterns exist (Hair et al 2010). Factor Analysis groups those variables together which are highly correlated and are assumed to belong together (Hair et al 2010). The Harris-Kaiser method of rotation was used to reduce the number of variables that had high loadings on each factor, in order to simplify the patterns for interpretation (SAS 2010). The Harris-Kaiser rotation is an orthoblique rotation technique and was used because it produces an oblique factor solution which is easy to interpret as the factors do not overlap conceptually (SAS 2010).

The following rules need to be considered, in order to determine the number of factors to be retained for this research report:

- Rule 1: Eigenvalues – represent the amount of variance that is contained within the original variables and is associated with a factor (Hair et al 2010). Only factors with an eigenvalue of 1.0 will be retained (Hair et al 2010). If this rule is applied in isolation, then only 1 factor is retained. See Table 7, second column, for eigenvalues.
- Rule 2: Percentage of Variance – enough factors need to be included in the analysis in order to explain at least 60% of the cumulative variance (Hair et al 2010). If this rule is applied in isolation, 2 factors are retained which represents 71.09% of the cumulative variance of the original 15 variables. See Table 7, last column for cumulative variance.

Table 7: Eigenvalues of the Reduced Covariance Matrix as per SAS

Factor	Eigenvalue	Difference	% Proportion	% Cumulative
1	1.74042431	0.79693522	46.10	46.10
2	0.94348908	0.37684259	25.00	71.09
3	0.56664649	0.14083750	15.01	86.10
4	0.42580899	0.15839846	11.28	97.38
5	0.26741053	0.11369685	7.08	104.47
6	0.15371367	0.01210765	4.07	108.54
7	0.14160603	0.09817680	3.75	112.29
8	0.04342923	0.01556860	1.15	113.44
9	0.02786063	0.02417422	0.74	114.18
10	0.00368641	0.05516468	0.10	114.28
11	-.05147827	0.04225199	-1.36	112.91
12	-.09373026	0.06993066	-2.48	110.43
13	-.16366092	0.06641592	-4.34	106.09
14	-.23007684		-6.09	100.00

- Rule 3: Scree Plot – considers the changes in eigenvalues and only includes those eigenvalues on and above the “elbow” (inflection point) in the Scree Plot (Hair et al 2010). If this rule is applied in isolation, 3 factors are retained.

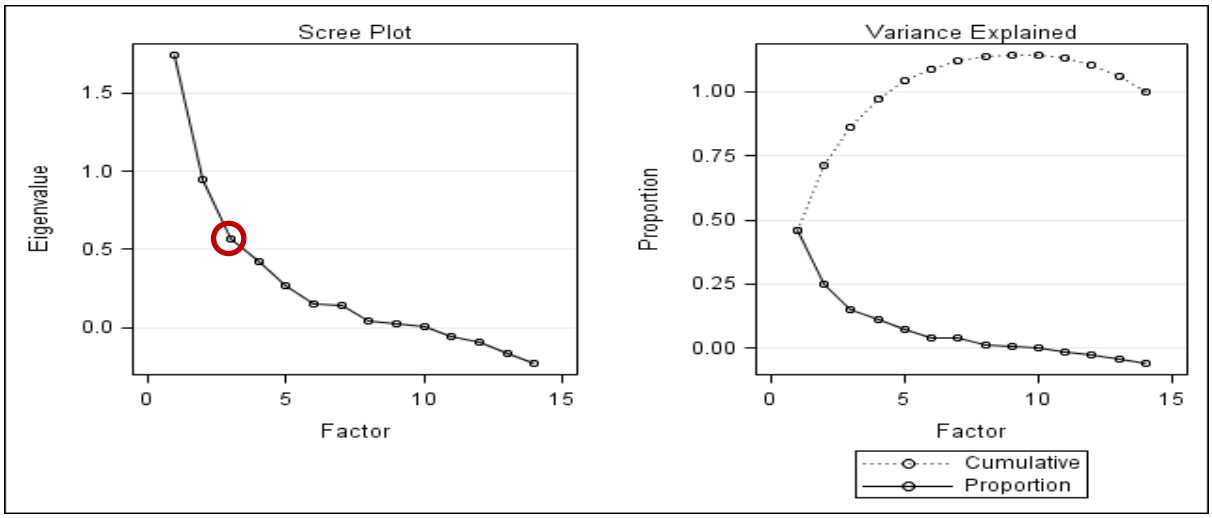


Figure 2: Scree Plot for Factor Analysis as per SAS

Taking all three rules and the research objectives into account, three factors have been retained for this research report which accounts for 86.10% of the cumulative variance. The final step in the Factor Analysis is to interpret each of the three factors, based on their factor loadings (Hair et al 2010). As can be seen in Table 8, the highlighted blocks represent the statements that are loading most highly on each of the 3 factors.

Table 8: Rotated Factor Pattern (Standardised Regression Coefficients) as per SAS

Statement	Factor 1	Factor 2	Factor 3
St 15	0.59340	-0.18861	0.13133
St 2	0.47143	-0.04332	-0.11009
St 6	0.44619	0.02133	0.08993
St 3	0.44481	0.06836	-0.05367
St 4	0.38150	0.03943	-0.19831
St 12	0.28562	0.10016	-0.01974
St 8	-0.06453	0.73896	-0.00555
St 13	-0.04995	0.56982	-0.03217
St 10	0.13533	0.43063	0.10801
St 9	0.01202	-0.01713	0.52575
St 7	-0.05595	0.04481	0.44690
St 5	0.16343	-0.11784	0.38510
St 1	0.03851	0.05103	0.35953
St 14	0.09825	0.16651	0.25800

Note: Statement 11 had to be excluded from the Exploratory Factor Analysis because it loaded equally on 2 factors (Hair et al 2010).

A factor loading represents the correlation between the variable and the factor (Hair et al 2010). According to Hair et al (2010), factor loadings of between ± 0.30 and ± 0.40 are the minimum levels to ensure practical significance and explain approximately 10% of the variance. Thus, the larger the factor loading the more important it is (Hair et al 2010). Given the sample size of 292, factor loadings of 0.35 and higher are considered to be significant for interpretation (Hair et al 2010). As can be seen in Table 8, statements 12 and 14 are below the minimum level of 0.30 and have been excluded from the factor summary as they are poorly accounted for by the factor solution (Hair et al 2010).

Table 9: Factor Structure Summary

Factor 1		Factor 2		Factor 3	
St 15	Free Samples	St 8	Newspaper Adverts	St 9	Loyalty Programmes
St 2	Doctor Recommendations	St 13	TV Adverts	St 7	Product Discounts
St 6	In-store Promoter Demonstrations	St 10	Catalogue Adverts	St 5	Competitions
St 3	Product Demonstrations			St 1	Mass Media Adverts
St 4	Friends and Family Recommendations				
'Trusted Recommendations'		**'Advertising'**		**'Added Value'**	

Table 9 brings together each statement in order of importance (those that correlate to the greatest degree) under its relevant factor.

Factor 1 - has the highest loading on statement 15 (free samples), which accounts for approximately 25% of the variance (Hair et al 2010). All the promotional activities contained within this factor are related to recommendations that are from trusted sources of information, namely friends and family, doctor recommendations and oneself i.e. being able to test samples and see product demonstrations at exhibitions and in retail stores. Thus, this factor is labelled **'Trusted Recommendations'**.

Factor 2 – has the highest loading on statement 8 (newspaper adverts), which accounts for approximately 50% of the variance. Statement 13 (TV adverts) also has a reasonably high loading and accounts for approximately 25% of the variance. All three promotional activities contained within this factor represent various advertising platforms and thus is labelled **'Advertising'**.

Factor 3 – has the highest loading on statement 9 (loyalty programmes) which accounts for 25% of the variance. All the promotional activities contained in this factor provide the consumer with an added benefit i.e. receiving rewards, discounts and the ability to enter a competition, thus it has been labelled **'Added Value'**.

4.2.2.2.1 Summary of Findings of Exploratory Factor Analysis

There are three factors which have an influence on consumer decision making, namely ‘Trusted Recommendations’, ‘Advertising’ and ‘Added Value’.

4.2.2.3 K-means Cluster Analysis

A K-means Cluster Analysis was performed using NCSS on the three factors as determined by the Exploratory Factor Analysis. The Cluster Analysis provided the researcher with the best way of splitting the data in order to minimise the internal variation within each cluster and maximise the external variation between each cluster (Hair et al 2010).

Iteration No.	No. of Clusters	Percent of Variation	Bar Chart of Percent
2	2	66.20	||||||||||||||||||
8	3	50.58	||||||||||||||
14	4	41.41	||||||||||||
16	5	34.66	||||||||||
23	6	30.93	|||||||||
27	7	27.54	||||||||
34	8	24.97	|||||||
39	9	22.87	||||||

Figure 3: Minimum Iteration Section of Cluster Analysis as per NCSS

As can be seen in Figure 3, as the number of clusters increase, the percent of variation decreases, but by less each time until the percent of variation starts to plateau. At the point of plateau, it is no longer useful to add more clusters because the clusters start to become too small to represent all of the different groups within a population (Hair et al 2010). There is a plateau between clusters 4 and 5 and, thus, the researcher has optimised the solution at 4 clusters.

Table 10: Cluster Means as per NCSS

Variables	Cluster 1	Cluster 2	Cluster 3	Cluster 4
Factor 1 – 'Trusted Recommendations'	0.7219255	-0.5401819	0.7511657	-0.5219798
Factor 2 – 'Advertising'	-0.3163976	0.3513772	1.496136	-0.6043307
Factor 3 – 'Added Value'	-0.4376359	0.5449241	0.9307446	-0.4481654
Count	90	85	33	84

The mean of each factor score represents each cluster's position on the factor (SAS 2010). If the factor scores are -

- Positive – it influences the decision making processes of women; and
- Negative – it does not influence the decision making processes of women.

Table 11: Important Demographic Findings within each Cluster

Cluster	Age	Race	Income Level	Other Important Information	Strongest Factor Loading
1	72% 25-35	81% White	28% R8,000-R19,999 43% R20,000.00-R39,999.00	57% are breastfeeding 62% have children	Influenced by: Trusted Recommendations
2	66% 25-35	62% White	29% R8,000-R19,999 35% R20,000-R39,999	39% are breastfeeding 67% have children	Influenced by: Advertising and Added Value
3	73% 25-34	48% White 33% Black and Coloured	27% <R7,999 27% R8,000-R19,999 27% R20,000-R39,999	76% are planning to fall pregnant	Influenced by: Trusted Recommendations, Advertising and Added Value
4	71% 25-34	71% white	39% R20,000-R39,999 28% R40,000+	52% are breastfeeding 63% have children	Influenced by: None of the Factors

On analysing Table 10 and Table 11, the cluster analysis revealed that there are four different groups of women who all need to be marketed to in a slightly different way.

Table 12: Cluster Summary

Cluster	Cluster Name	Which promotional activities will influence them the most?
1	**The Working Mommies**	Recommendations from friends and family, recommendations from healthcare professionals, exhibitions, product demonstrations and samples. They acknowledge 'Trusted Recommendations' when making product purchases.
2	**The Media Fanatic and Bargain Hunter Moms**	Any form of mass media advertising will attract their attention as well as promotional activities that will give them 'Added Value' such as discounts, loyalty programmes and competitions.
3	**The Young and Aspirant**	Friends and family, healthcare professionals, samples, they like nice packaging, but are still looking for a good deal, they are technologically savvy and email and text messages are the way to communicate with them.
4	**Trend Setting Moms**	Value their own opinions and do not take notice of promotional activities. They make their own decisions on which products to buy.

4.2.2.3.1 Summary of Findings of K-means Cluster Analysis

There are four different clusters of women in South Africa which are each influenced by a unique mix of promotional activities, namely 'The Working Mommies', 'The Media Fanatic Moms', 'The Young and Aspirant' and the 'Trend Setting Moms'. Thus marketers need to tailor their promotional activities accordingly.

4.2.3 Ranked Statements

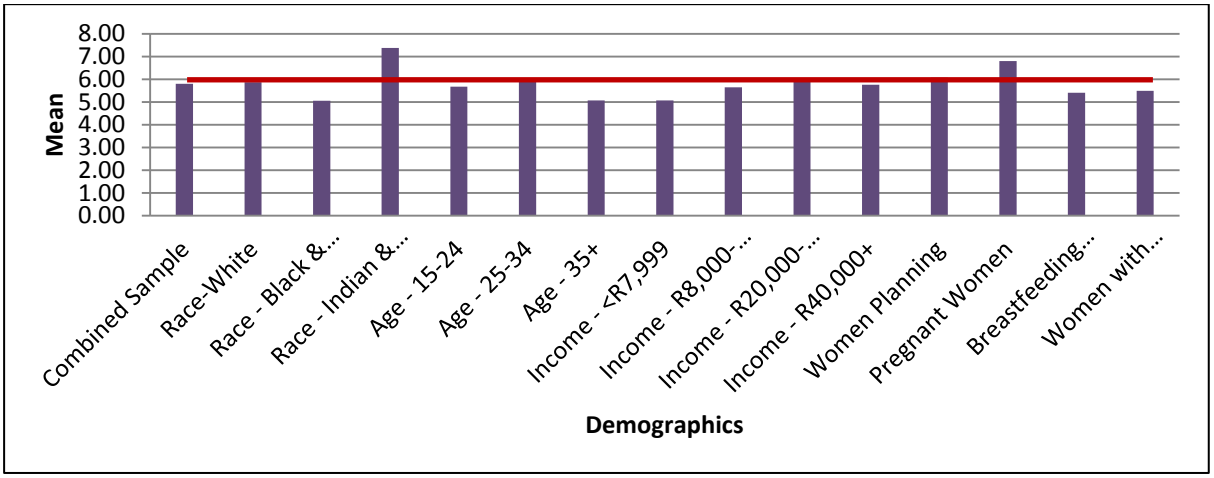
Respondents were requested to rank 10 promotional activities from a specified list in order from 1 (most important) to 10 (least important) which may influence their decision making processes as a consumer of a fast moving consumer good. The ranked promotional activities have been tabulated according to the demographics of the study.

Only 106 respondents out of 292 completed this section of the survey correctly. Thus, only 36% of the respondents understood what was required. Accordingly, 186 respondents had to be removed from this section of analysis because instead of ranking each promotional activity in order from 1 to 10, they assigned a random value to each between 1 and 10. A Friedman Ranks Test in NCSS was used to summarise the data related to each of the various demographic factors. Each Bar Chart

compares the Mean Rank of the Combined Sample (all 106 female participants) against the different demographic factors, such as, race, age, income level, pregnancy status and experience of a previous pregnancy.

4.2.3.1 Promotional Activity Ranks

4.2.3.1.1 Mass Media Advertising



<u>Figure 4:</u> Bar Graph showing the Mean Rank of Mass Media Advertising against a number of Demographic Variables

The mean rank for the combined sample for mass media advertising is 5.80. The Indian and Asian race had the highest mean rank, of 7.38, which was most likely skewed by the small sample size. Pregnant women had a slightly worse mean rank than the combined sample. Thus, mass media advertising is not likely to influence the decision making processes of pregnant women.

4.2.3.1.2 Celebrity Endorsements

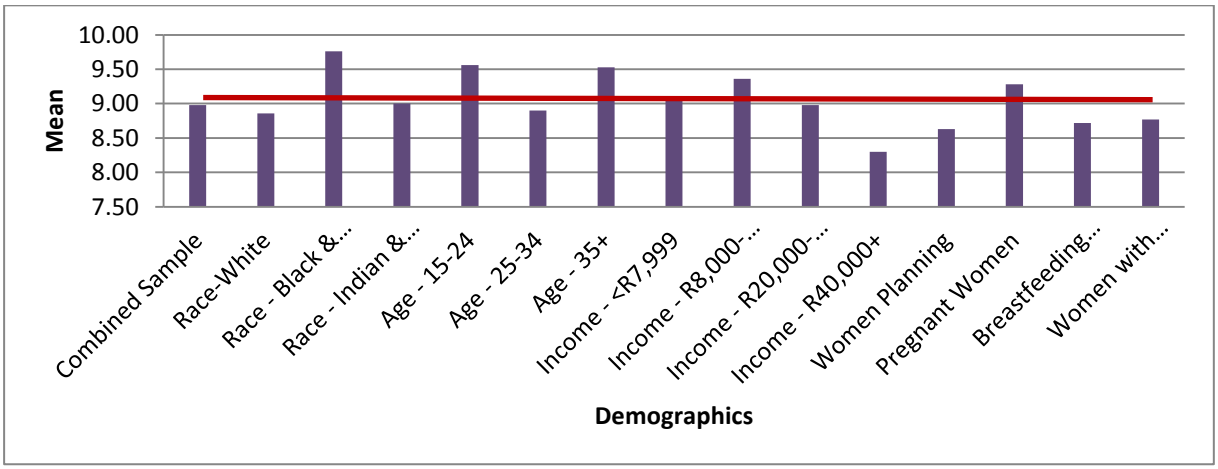


Figure 5: Bar Graph showing the Mean Rank of Celebrity Endorsements against a number of Demographic Variables

The mean rank for celebrity endorsements of products for the combined sample is 8.98. Pregnant women had a slightly worse mean rank of 9.28, which demonstrates that celebrities are not likely to influence the decision making processes of pregnant women.

4.2.3.1.3 Charity Affiliations

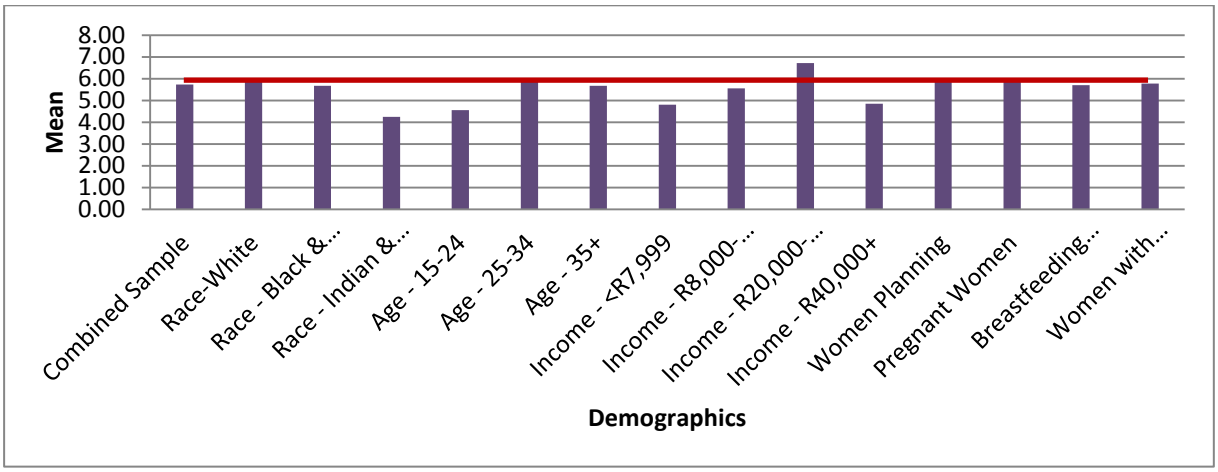


Figure 6: Bar Graph showing the Mean Rank for Charity Affiliations against a number of Demographic Variables

The mean rank for charity affiliations for the combined sample is 5.73. Women in the income bracket 'R20,000-R39,999', are least likely to be influenced by charity

affiliations, with a mean rank of 6.71. However, women in the lowest income bracket '<R7,999' are most likely to be swayed by charity affiliations. Pregnant women ranked charity affiliations slightly less favourably than the combined sample. Thus, charity affiliations are not likely to influence the decision making processes of pregnant women.

4.2.3.1.4 Price / Quantity Promotions

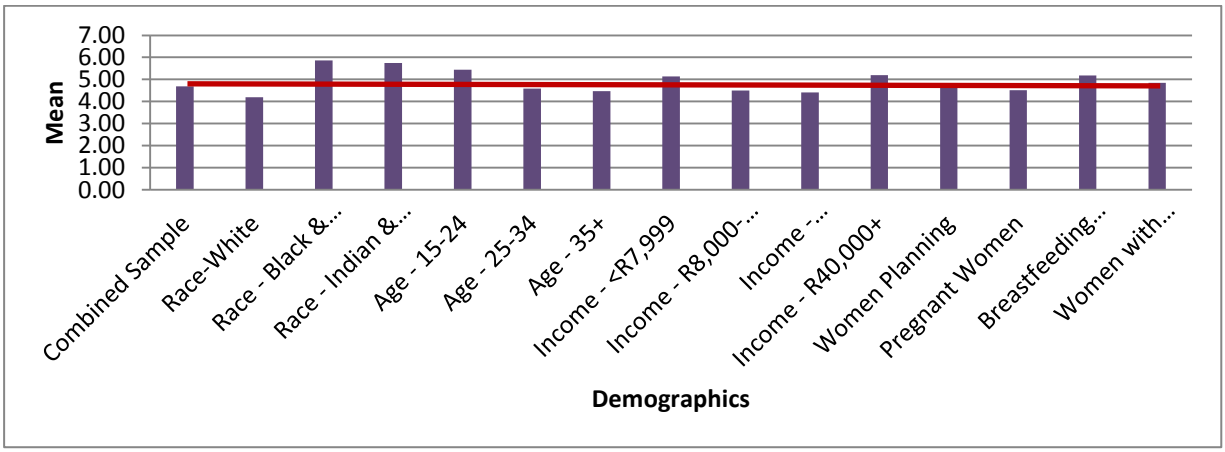
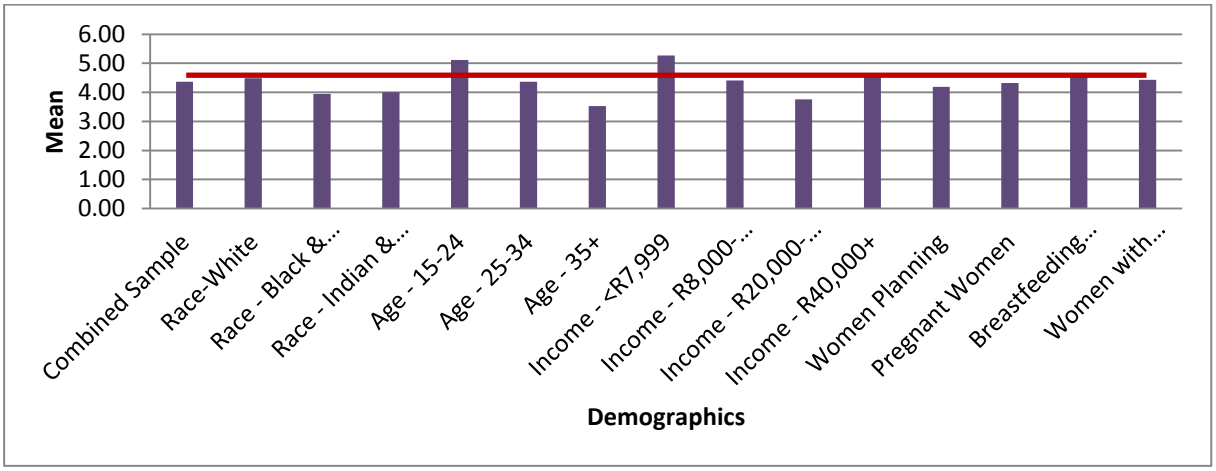


Figure 7: Bar Graph showing the Mean Rank for In-store Price / Quantity Promotions against a number of Demographic Variables

The mean rank for price / quantity promotions for the combined sample is 4.68. White women tend to rank it slightly more favourably than the combined sample with a mean rank of 4.19. However, Asian, Indian, Black and Coloured women tend to rank price / quantity promotions less favourably. Pregnant women ranked price / quantity promotions slightly less favourably than the combined sample. Price / Quantity promotions are ranked within their top 5 promotional activities and thus, are likely to influence the decision making processes of pregnant women.

4.2.3.1.5 Samples



<u>Figure 8:</u> Bar Graph showing the Mean Rank for Samples against a number of Demographic Variables

Women rank this form of promotional activity a mean rank of 4.36. The group of women most likely to be influenced by free samples are those over the age of 35 followed by those in the income bracket 'R20,000-R39,999'. The group of women least likely to be influenced by free samples are those in the income bracket '<R7,999' and those aged between '15-24'. Pregnant women ranked free samples slightly more favourably than the combined sample and thus, are likely to influence the decision making processes of pregnant women.

4.2.3.1.6 Loyalty Programmes

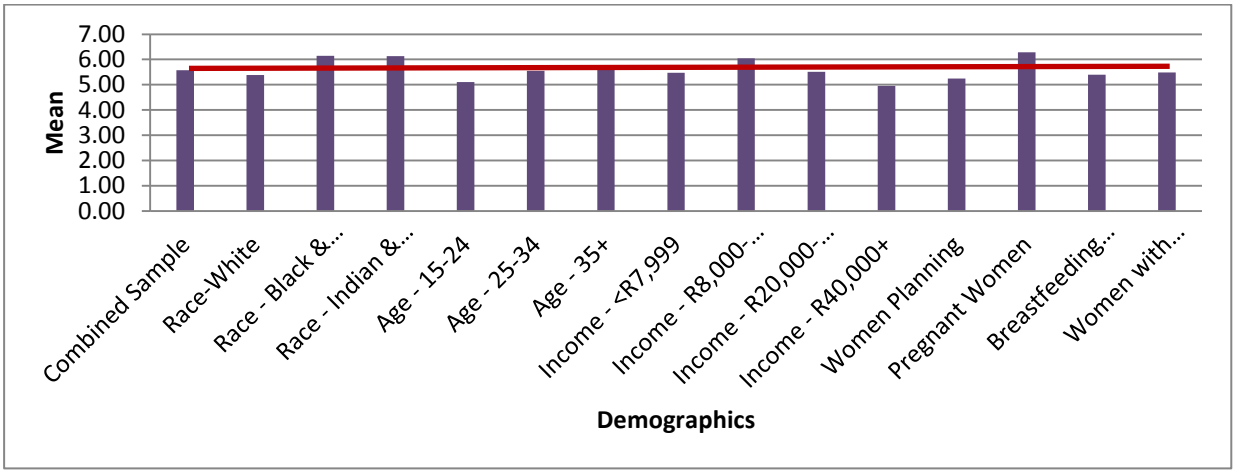


Figure 9: Bar Graph showing the Mean Rank for Store Loyalty Programmes against a number of Demographic Variables

The mean rank for loyalty programmes for the combined sample is 5.58. Black, Coloured, Indian and Asian women, women in the income bracket 'R8,000-R19,999' and pregnant women rank loyalty programmes slightly worse than the mean rank. Thus, loyalty programmes are less likely to influence the decision making processes of pregnant women.

4.2.3.1.7 Recommendations by Friends and Family

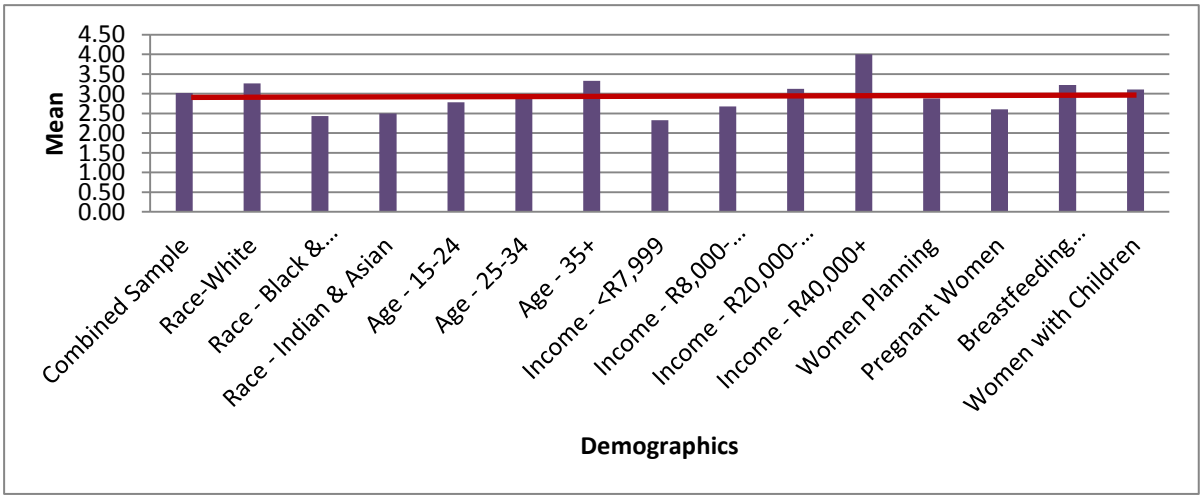
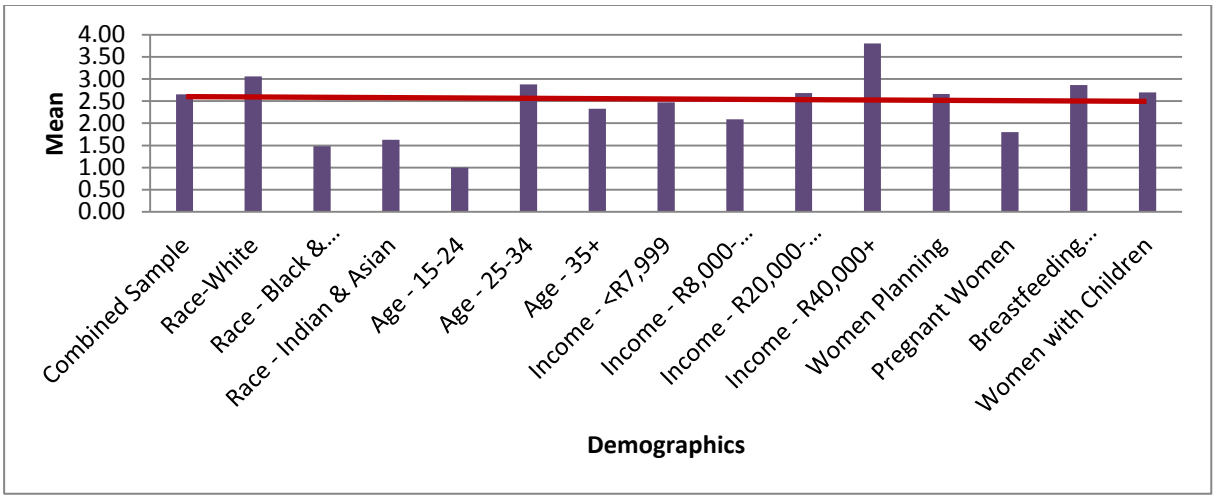


Figure 10: Bar Graph showing the Mean Rank of Recommendations by Friends and Family against a number of Demographic Variables

The mean rank for product recommendations by friends and family is 3.02. Pregnant women have a slightly more favourable mean rank of 2.60, which indicates that friends and family are likely to influence their decision making processes.

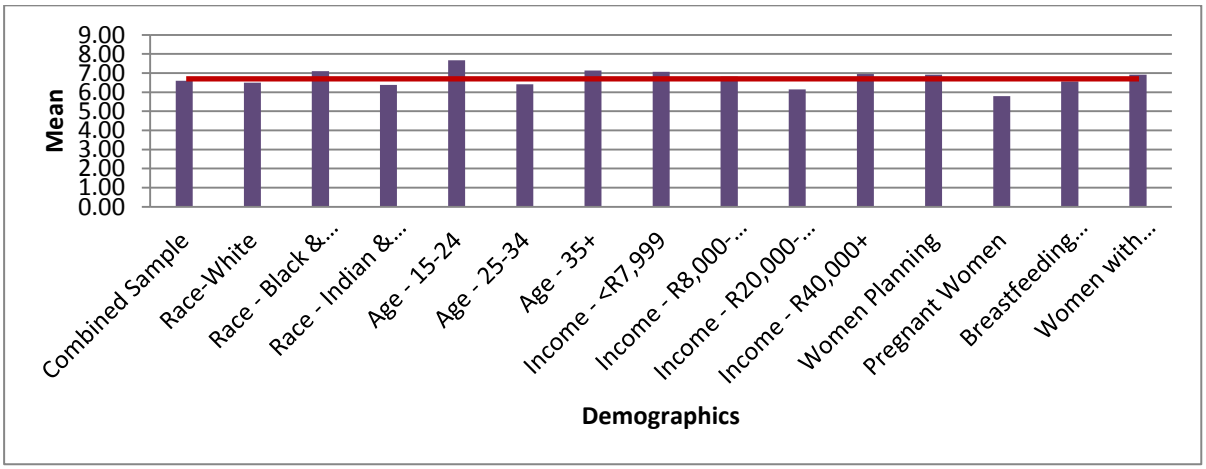
4.2.3.1.8 Recommendations by Healthcare Professionals



<u>Figure 11:</u> Bar Graph showing the Mean Rank of Recommendations by Healthcare Professionals against a number of Demographic Variables

The mean rank for product recommendations by healthcare professionals is 2.65. Pregnant women rank this slightly more favourably, indicating that healthcare professionals are most likely to influence their decision making processes.

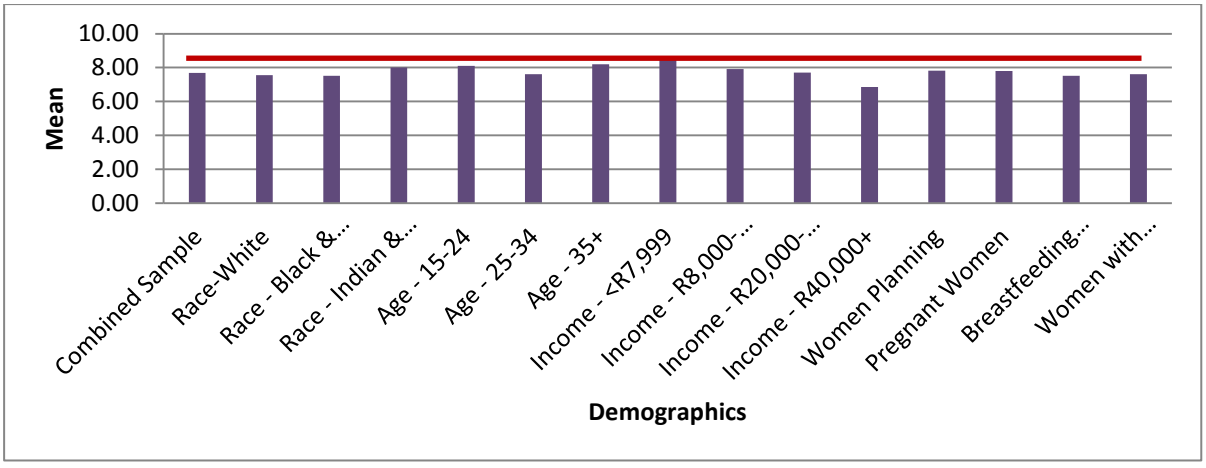
4.2.3.1.9 Consumer Reviews



<u>Figure 12:</u> Bar Graph showing the Mean Rank of Consumer Reviews against a number of Demographic Variables

The mean rank of consumer reviews is 6.59. Pregnant women rank consumer reviews more favourably than the combined sample, at 5.80. Thus, pregnant women are more likely to be influenced by consumer reviews.

4.2.3.1.10 Text Message or Email Adverts



<u>Figure 13:</u> Bar Graph showing the Mean Rank for Text Message or Email Adverts against a number of Demographic Variables

The mean rank for products advertised via text messages or emails for the combined sample is 7.69. Pregnant women rank this slightly less favourably at 7.80, which indicates that they are less likely to be influenced by this promotional activity.

4.2.3.2 Summary of Findings to Ranked Statements

Table 13: Summary of Ranks of Promotional Activities

Promotional Activity	Rank according to Combined Sample	Rank according to Pregnant Women
Recommendations by Healthcare Professionals	1	1
Recommendations by Friends and Family	2	2
Samples	3	3
Price / quantity Promotions	4	4
Loyalty Programmes	5	8
Charity Affiliations	6	6
Mass Media Advertising	7	7
Consumer Reviews	8	5
Text Message and Email Adverts	9	9
Celebrity Endorsements	10	10

See Appendix "C" (Table 31) for the comprehensive detail to Table 13, as well as for the Confidence Intervals (Table 32) for each promotional activity.

The decision making processes of women are most likely to be influenced by recommendations from healthcare professionals, followed by recommendations by friends and family, and are least likely to be influenced by celebrity endorsements.

The major difference in opinion with regards to promotional activities is that pregnant women are more likely to be influenced by consumer reviews and less likely to be influenced by loyalty programmes as compared with the combined sample.

Table 14, provides a Summary of the Ranks from each of the various Demographic Variables. Table 14 summarises the findings of section 4.2.3.1.1 to section 4.2.3.1.10. It highlights the importance of recommendations by healthcare professionals and family and friends, and the lack of importance of text and email adverts and celebrity endorsements across the demographic spectrum.

Table 14: Rank Summary against a number of Demographic Variables

Promotional Activity	Rank Pregnant Women	Rank Planning a Pregnancy	Rank Breastfeeding Mothers	Rank Women with Children	Rank Race			Rank Age			Rank according to Income			
					White	Black and Coloured	Indian and Asian	15-24	25-34	35+	<R7,999	R8,000-R19,999	R20,000-R39,999	R40,000+
Healthcare Professionals	1	1	1	1	1	1	1	1	1	1	2	1	1	1
Friends and Family	2	2	2	2	2	2	2	2	2	2	1	2	2	2
Samples	3	3	3	3	4	3	3	5	3	3	6	3	3	3
Price / Quantity Promotions	4	4	6	4	3	6	5	6	4	4	5	4	4	6
Consumer Reviews	5	8	8	8	8	8	7	8	8	8	8	8	7	9
Charity Affiliations	6	6	7	7	7	5	4	3	6	6	3	5	8	4
Mass Media Advertising	8	7	4	5	6	4	8	7	7	5	4	6	6	7
Loyalty Programmes	7	5	5	6	5	7	6	4	5	7	7	7	5	5
Text and Email Adverts	9	9	9	9	9	9	9	9	9	9	9	9	9	8
Celebrity Endorsements	10	10	10	10	10	10	10	10	10	10	10	10	10	10

See Appendix “C” (Table 31) for the comprehensive detail to Table 14.

4.3 Qualitative Consumer Interviews

4.3.1 Demographic Profile of Respondents

Personal interviews were conducted with eight of the respondents who had participated in the quantitative online and intercept consumer survey. These eight respondents were questioned with regards to section 3 of the quantitative consumer survey. They were asked to give the reasons why they had ranked certain promotional activities more favourably than others.

Table 15: Demographic Profile of Respondents to Consumer Interviews

Respondent	Race	Age	Income Level	Women who are pregnant	Women who have children
1	White	25-34	R20,000-R39,999	No	Yes
2	White	25-34	R40,000+	Yes	No
3	White	25-34	R40,000+	No	Yes
4	White	25-34	R40,000+	No	No
5	White	35+	R20,000-R39,999	No	Yes
6	Indian	25-34	R40,000+	No	No
7	Black	25-34	R40,000+	No	No
8	Black	25-34	R40,000+	No	Yes
Total	**White = 63%** **Indian = 13%** **Black = 25%**	**25-35 = 88%** **35+ = 13%**	**R20,000-R39,000 = 25%** **R40,000+ =75%**	**1**	**4**

4.3.2 Consumer Responses to Interviews

Table 16 is a summary of the consumer responses providing frequencies of the most common themes contained within the personal consumer interviews.

Table 16: Common Themes contained within the Personal Consumer Interviews

Respondent	Bombarded by Mass Media Advertising	Price / Quantity Promotions provide added value	Samples Allow you to test before you buy	Celebrities are superficial	Charity Affiliations have a 'feel good' factor	Loyalty programmes provide added value	Friends and Family are trusted sources of information	Healthcare Professionals know what they are talking about	Consumer reviews are for general overviews	Text / Email adverts are annoying
1	Yes	Yes		Yes	Yes	Yes	Yes	Yes	Yes	Yes
2	Yes	Yes	Yes			Yes		Yes		
3		Yes	Yes	Yes		Yes	Yes	Yes		
4	Yes		Yes	Yes	Yes	Yes	Yes	Yes		Yes
5		Yes		Yes	Yes	Yes	Yes	Yes	Yes	Yes
6			Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
7					Yes					Yes
8			Yes	Yes			Yes			
Frequency	**3 (38%)**	**4 (50%)**	**5 (63%)**	**6 (75%)**	**5 (63%)**	**6 (75%)**	**6 (75%)**	**6 (75%)**	**3 (38%)**	**5 (63%)**
Key Influencer	**No**	**Yes**	**Yes**	**No**	**Yes**	**Yes**	**Yes**	**Yes**	**No**	**No**

Table 17 provides insight into the consumers' thoughts and motivations, noting some of their key comments.

Table 17: Responses to the Personal Consumer Interviews

Promotional Activities	Consumer Responses
Mass Media Adverts	• Consumers are bombarded by adverts. o Does not pay attention to adverts and skips them.
Price / quantity In-store promotions	• Looks for value for money / good deal / price motivating. o So many products on the market, will look at price.
Samples	• New products can be tested before investment. o Reduces risk of purchase.
Celebrity Endorsements	• Superficial. o Paid to push product and may not even use it.
Charity Affiliations.	• There is a feel good factor. o It is good to help others who are less fortunate.
Loyalty Programmes	• Get something back for nothing. o Economic incentive is a motivator.
Friends / family	• Word-of-mouth is best form of advertising. o Tried and tested. Nothing to gain.
Healthcare Professionals	• Knowledgeable people. o Tried and tested. Reliable source of information.
Consumer Reviews	• Will give a general overview of product. o Only if it is additional information on product.
Text message and Email Adverts	• Do not open adverts if I do not know who it is from. o Delete / mark as 'spam'.

See Appendix "D" (Table 33) for the comprehensive detail to Table 17.

4.3.3 Summary of Findings of Qualitative Consumer Interviews

As can be seen in Table 16 and 17, the following promotional activities are -

Most likely to influence the decision making processes of women:

- Price / quantity in-store promotions;
- Samples;
- Charity affiliations;
- Store loyalty programmes;
- Recommendations by friends and family; and

- Recommendations by healthcare professionals.

Least likely to influence the decision making processes of women:

- Celebrity endorsements; and
- Text message and email adverts.

4.4 Qualitative Trade Interviews

4.4.1 Demographic Profile of Trade Interviewees

Structured qualitative personal interviews were held with five South African companies from the trade.

Table 18: Demographic Profile of Trade Interviewees

Trade	Type	Size	Interviewee	Title
Koco Bino	Retailer	Small family owned	Mandy Manas	Owner
Edgars	Retailer	Large Corporate (Edcon)	Sharon Botha	Marketing Manager
Huggies	Manufacturer	Large Corporate (Kimberly-Clark)	Carlyn Foster	Marketing Manager
Georen	Manufacturer	Medium sized family owned	Francois du Toit	Owner
Draft FCB	Ad Agency	Large Corporate	Robyn Groenewald	Data and Insights Manager

4.4.2 Trade Responses to Interviews

See Table 19 for the common themes contained within the trade interviews.

Table 19: **Common Themes contained within the Trade Interviews**

Respondent	Favour Above-the-line	Favour Below-the-line	Mass Media Advertising is important	Price / Quantity promotions drive volumes	Sampling is difficult to sustain / control	Celebrities are not credible	Charity affiliations are important to moms	Loyalty programmes maintain customer base	Friends and Family are credible	Healthcare Professionals are credible	Consumers are looking for content not adverts	Customers like finding out about new products	Women like attractive product packaging	In-store competitions increase product facings / awareness	Media reviews are important	Eventing is expensive and may not lead to a return
1	Yes		Yes			Yes		Yes	Yes							
2	Both	Both	Yes	Yes	Yes			Yes	Yes	Yes	Yes	Yes	Yes	Yes		Yes
3	Both	Both	Yes	Yes	Yes	Yes	Yes	Yes	Yes				Yes	Yes	Yes	Yes
4		Yes		Yes		Yes			Yes			Yes	Yes			
5	Both	Both		Yes	Yes	Yes			Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Total Count	**1**	**1**	**3**	**4**	**3**	**4**	**1**	**3**	**5**	**2**	**2**	**3**	**4**	**3**	**2**	**3**
Frequency	**20%**	**20%**	**60%**	**80%**	**60%**	**80%**	**20%**	**60%**	**100%**	**40%**	**40%**	**60%**	**80%**	**60%**	**40%**	**60%**
Key Influencer			**Yes**	**Yes**	**No**	**No**	**No**	**Yes**	**Yes**	**No**	**No**	**Yes**	**Yes**	**Yes**	**No**	**No**

As can be seen in Table 19, at least 50% of trade interviewees had the strongest opinions with regards to the following promotional activities –

- 60% felt above-the-line and below-the-line promotional activities are equally important to consumers;
- 80% felt price / quantity in-store promotions are important to consumers because higher foot counts are recorded during promotional periods;
- 80% felt that sampling is an expensive promotional activity;
- 80% felt that products being endorsed by celebrities are not credible to consumers;
- 60% felt that store loyalty programmes are important to consumers because they like being engaged with;
- 100% felt that product recommendations by friends and family are the most credible source of information to consumers;
- 60% felt that text message and email adverts are important to consumers because it provides them with information on new products;
- 80% felt that attractive product packaging was important to women and could sway them into making an alternative product purchase;
- 60% felt that in-store competitions are important because it increases shelf presence and product awareness; and
- 60% felt that eventing was a good way to introduce new products to customers but was expensive and may not lead to an immediate return.

Table 20 provides insights from the perspective of the trade, noting some of their key comments. See Appendix “E” (Table 34) for the comprehensive detail to Table 20.

Table 20: Responses to the Interviews with the Trade

Promotional Activities	Trade Responses

Which is more important - Above-the-line (ATL) vs Below-the-line (BTL) promotional activities?	• ATL promotions are used for quick fix promotions to increase reach.
	  ○ Builds presence and credibility.
	• BTL makes the product more exclusive.
	  ○ Goes directly to the customer.

Mass Media Adverts	• Focus groups reveal that TV is still extremely important. ○ Pulls customers into the stores.
Price / quantity In-store promotions	• Price can drive volumes, but profitability is normally poor. ○ Consumers are always looking for bargains.
Samples to test	• Sampling is an expensive promotional activity. ○ Over sampling can result in reduced sales.
Celebrity endorsements	• Celebrities are paid to endorse a product. ○ May not even use the product. Thus, might not be credible.
Charity affiliations	• Moms are more conscious of charities. ○ Can help to build a “warm fuzzy” brand perception.
Loyalty programmes	• Maintains customer base. ○ Encourages customer loyalty.
Recommendations by friends / family	• Friends and family members are a source of credible information. ○ Nothing to gain from recommending a product.
Recommendations by a Healthcare Professional	• Can give credibility to product. ○ Try and test products.
Consumer reviews	• Customers look for content and do not see the advert banner. ○ Mothers are ‘hungry’ for information.
Text and email adverts	• Text messages are good for advising customers of new stock. ○ Customers like catalogues and brochures.
Attractive product packaging	• Women like things that look good and are pretty. ○ Packaging makes a big difference for women.
In-store competitions	• Gain trade support with in-store space and gondola ends. ○ Competitions need to be quick and easy.
Publicity	• Good to give the media samples for editorial coverage. ○ Consumers like editor opinion in media.
Eventing	• Important, but expensive. ○ Does not lead to an immediate transaction.

4.4.3 Summary of Findings of Qualitative Trade Interviews

The trade rate the following promotional activities as most effective when marketing their products to pregnant women in South Africa –

- Mass media advertising;
- Price / quantity promotions;
- Loyalty programmes;
- Word-of-mouth marketing, namely recommendations from friends and family;
- Text message and email adverts;
- Attractive packaging; and
- In-store competitions.

CHAPTER 5: DISCUSSION OF THE RESULTS

5.1 Introduction

This chapter discusses the results that were presented in Chapter 4. The results are going to be discussed in such a way that they answer the two research questions which were proposed in Chapter 2 of this Research Report, namely:

- **Research Question 1: Which promotional activities are most likely to influence the decision making processes and attract the attention of pregnant women in South Africa?**
- **Research Question 2: How will demographic factors such as race, age, income level, pregnancy status and the experience of a previous pregnancy change the promotional activities needed to influence the decision making processes of pregnant women in South Africa?**

5.2 Demographic Profile of Respondents to the Online and Intercept Consumer Survey

IndexMundi (2012) and Statistics South Africa (2011) project the population of South Africa to be at 49 million by the end of 2012, of which 15 million are women of child bearing age. However, only twenty percent, approximately 3 million women of child bearing age, fall within the private healthcare sector, (Republic of South Africa 2004). Furthermore, IndexMundi (2012) and Statistics South Africa (2011) break down the population as follows:

Table 21: South African Population Statistics versus Demographic Profile of Respondents

South African Population Statistics		Demographic Profile of Respondents	
White	9.60%	**White**	69.18%
Black / Coloured	87.90%	**Black / Coloured**	26.24%
Indian / Asian	2.50%	**Indian / Asian**	12.67%

As can be seen in Table 21, the demographic profile of the respondents to the consumer survey is skewed and does not match the demographic profile of the South African population. Thus, the sample used in this research report is not representative of the general population of South Africa, but probably does represent the demographics of the private healthcare sector in South Africa.

5.3 Research Question 1

Which promotional activities are most likely to influence the decision making processes of pregnant women in South Africa?

Research Question 1 will be answered by making use of –

- The Descriptive Statistics of the Likert scaled statements in section 2 of the Quantitative Online and Intercept Consumer Survey;
- The Exploratory Factor Analysis of the Likert scaled statements in section 2 of the Quantitative Online and Intercept Consumer Survey;
- The Rankings in section 3 of the Quantitative Online and Intercept Consumer Survey; and
- The Qualitative Personal Consumer and Trade Interviews

5.3.1 Summary of Findings from the Descriptive Statistics

The Descriptive Statistics identified the following key promotional activities as being most likely to influence the decision making process of pregnant women.

Table 22: Key Promotional Activities as per Descriptive Statistics

Promotional Activities	Level of Agreement	Level of Importance
Recommendations by healthcare professionals	92%	Most Favourable ↓ Least Favourable
Recommendations by friends and family	87%	
Samples	87%	
In-store demonstrations	71%	
Product exhibitions	65%	
In-store pricing promotions	55%	
Email adverts	54%	

5.3.2 Summary of Findings from Exploratory Factor Analysis

The Exploratory Factor Analysis identified three sets of factors that are most likely to influence the decision making process of pregnant women in South Africa.

Table 23: Key Factors as per Exploratory Factor Analysis

No.	Factors	Promotional Activities
1	**'Trusted Recommendations'**	• Free Samples • Recommendations by healthcare professionals • In-store promoter / product demonstrations • Recommendations by friends and family
2	**'Advertising'**	• Newspaper adverts • TV Adverts • Catalogue Adverts
3	**'Added Value'**	• Loyalty programmes • Product discounts • Competitions • Mass media advertising

5.3.3 Summary of Findings from Rankings

The Rankings identified the following key promotional activities as being most likely to influence the decision making process of pregnant women in South Africa.

Table 24: Key Promotional Activities as Ranks

Rank according to Pregnant Women	Promotional Activity	Level of Importance
Top 5 Promotional Activities		**Most Favourable**
1	Recommendations by Healthcare Professionals	
2	Recommendations by Friends and Family	
3	Samples	
4	Price / Quantity Promotions	
5	Consumer Reviews	
Bottom 5 Promotional Activities		
6	Charity Affiliations	
7	Mass Media Advertising	
8	Loyalty Programmes	
9	Text Message and Email Adverts	**Least Favourable**
10	Celebrity Endorsements	

5.3.4 Summary of Findings from the Qualitative Personal Consumer and Trade Interviews

The consumer and trade interviews identified the following key themes.

Table 25: Key Themes as per the Qualitative Personal Consumer and Trade Interviews

Promotional Activity	Qualitative Consumer Interviews	Qualitative Trade Interviews
Price / Quantity Promotions	Provide added value	Drive volumes
Loyalty Programmes	Provide added value	Maintain customer base
Recommendations by Friends and Family	Trusted sources	Credible sources
Recommendations by Healthcare Professionals	Know what they talking about	Credible sources
Samples	Test before you buy	-
Charity Affiliations	'Feel Good' factor	-
Mass Media Advertising	-	Important to create awareness
Text / Email Adverts	-	Source of customer information
Attractive Packaging	-	Women like attractive packaging
Competitions	-	Increase product facings / awareness

5.3.5 Consolidation of Quantitative and Qualitative Findings

Table 26 is useful in that it consolidates the findings from the Quantitative Surveys and Qualitative Interviews. This combination using the method of triangulation brings the perspectives of both the consumer and trade together. This is in line with the findings of Doyle et al (2006) who claimed that campaigns developed in partnership with the target audience and / or with the trade were the most successful.

Table 26: Consolidation of Quantitative and Qualitative Findings

Promotional Activities	Quantitative Surveys			Qualitative Interviews		Key Influencer
	Descriptive Statistics	Factor Analysis	Rankings	Consumer	Trade	
Mass Media Adverts	Low	Low	Low	Low	High	Nice to have
Price / quantity In-store promotions	High	High	High	High	High	Yes
Samples to test	High	Very High	Very High	High	Low	Yes
Celebrity endorsements	Low	-	Low	Low	Low	No
Charity affiliations	-	-	Moderate	High	Low	Nice to have
Loyalty programmes	-	Very High	Low	High	High	Yes
Recommendations by Friends / family	Very High	Moderate	Very High	High	High	Yes
Recommendations by Healthcare Professionals	Very High	High	Very High	High	High	Yes
Consumer reviews	-	-	High	-	-	Nice to have
Text and email adverts	Moderate	-	Low	-	High	No
Attractive product packaging	-	-	-	-	High	Nice to have
In-store competitions	-	Moderate	-	-	High	Nice to have
Publicity / Eventing	-	-	-	-	Low	No

5.3.6 Summary of Consolidated Findings

As can be seen in the Consolidated Table 26, word-of-mouth marketing (recommendations by friends, family and healthcare professionals) is the most likely promotional activity to influence the decision making processes of pregnant women in South Africa.

5.3.6.1 The Top Five Promotional Activities as seen by the Consumers and the Trade

Recommendations by Healthcare Professionals

A women's healthcare professional is the most important source of information in respect of new products, especially for pregnant women. As per the descriptive statistics 92% of the women surveyed agreed that recommendations from their healthcare professional would be the most likely factor to influence their decision making. This was reaffirmed during the consumer personal interviews, where 75% of the women interviewed stated that their healthcare professional was the most reliable source of information on new products as they have tried and tested them, especially when it comes to health and cosmetic related products. They also believed that their healthcare professional is an unbiased knowledgeable person who knows what he/she is talking about. Pekala (2011) confirmed this notion stating that consumers perceive recommendations by healthcare professionals as the most trustworthy source of information.

Recommendations by Friends and Family

Second to healthcare professionals, women rely on recommendations from their friends and family for information on new products. This was especially highly ranked by those women planning to fall pregnant and those who are already pregnant. Furthermore, 57% of women surveyed agreed that recommendations from friends and family are important in influencing their decision making processes. The consumer interviews revealed that 75% of women trust their friends' and family's opinions as their friends and family know them best and know what they like. Friends and family also have nothing to gain from making product recommendations i.e. they

are not being bribed to make the recommendation. This notion also came across in the literature review, whereby it was found that women begin their purchasing process by collecting information from trusted friends and family who have already tried and tested the product (Bayus 1985; Barletta 2003; Mitchell 2003; Ainsworth 2007; Nielsen 2011 – Women of Tomorrow).

Samples

Women also like receiving free samples to try out before they buy the actual product, especially new breastfeeding mothers. Five out of the eight women interviewed felt that samples reduced the risk of a purchase i.e. try before buy. Research conducted by Miller (1996) also concluded this to be true because women like to be able to see and touch a product before they buy it. The interviews conducted with the consumers were, however, not only positive and some negative comments came through, such as, most samples are too small to even be able to test whether they are worth buying and they end up not being used and thrown away. Furthermore, samples would only be tested by consumers if they had some experience with other products in the range. This contradicts the literature which stated that sampling was most effective when the customer had no experience with the product (Herbst and Harold 2007). The trade also had mixed feelings about samples, as the interviews revealed that 60% of the trade felt that sampling was a very expensive promotional activity, which involved a lot of resources and planning. They felt that samples had to be handed out to consumers at very specific times during their pregnancy, and that the quantity of samples handed out had to be strictly controlled as over-sampling could result in reduced product purchases.

Price / Quantity Promotions

With consumer confidence levels still on the low, consumers have to watch how they spend their money (Naidoo 2011). This is reflected in the research with in-store price / quantity promotions being ranked overall as fourth after recommendations by health care professionals, recommendations by friends and family and receiving free samples. Four out of the eight women interviewed (50%) admitted to shopping around for good deals in order to get more value for their money. The literature

review conducted in Chapter 2 of this research report also confirms the importance of sales promotions as everyone is trying to find some extra value in their purchases (Peattie and Peattie 1993; Nielsen 2011 – Women of Tomorrow). The trade also see the benefit in making use of price / quantity promotions in order to drive volumes and increase the foot count in their stores.

Loyalty Programmes

Loyalty programmes were ranked 8th by pregnant women, with mixed feelings coming through in the consumer interviews. Six out of the eight women interviewed liked store loyalty programmes because they felt that they were receiving added value or something for nothing. However, two out of the eight women interviewed felt that participating in a loyalty programme was tedious and involved too much administration for a very small reward. Furthermore, store loyalty programmes were preferred as opposed to product specific loyalty programmes. Accordingly, 60% of the trade interviewed felt that loyalty programmes were important because it kept customers loyal to their store / brand and helped them to engage with their customer base. This is consistent with the literature whereby Kotler and Keller (2009) stated that customer loyalty is important to marketers as it is up to five times more expensive to capture the attention of new customers than retaining satisfied customers.

5.3.6.2 Other Important Promotional Activities

Consumer Reviews

Consumer reviews were ranked as being the 5th most important motivator by pregnant women. This is consistent with the literature, in that internet consumer reviews allow women to find answers to intimate questions that they may have been too embarrassed to ask healthcare professionals or friends and family about (Djukic 2001). The interviews conducted with the consumers, revealed that consumer reviews were useful in providing a general overview on a product. However, consumers did not feel that consumer reviews were the most reliable source of information on a product and could have just been made up by the company whose

product was being reviewed. Similarly, 40% of the trade also noted that pregnant women were ‘information hungry’ and were scanning the internet for content but not taking any notice of adverts on chat room sites or blogs.

Charity Affiliations

Charity affiliations and sponsorships by companies were only ranked as being the 6th most favoured promotional activity by pregnant women. The consumer interviews revealed that 63% of women did think that charity affiliations had a “feel good” factor, but were not necessarily seen as “deal makers”. This is somewhat contradictory to the literature which stated that women prefer to purchase brands from companies that are charitable and it could even result in consumers switching brands (Farache et al 2008; Silverstein and Sayre 2009). A few negative comments did come up from two out of the eight women interviewed, in that they felt that companies claiming to support a particular charity were only doing so for their own economic benefit and that if a company wanted to donate funds to a charity they should do so on their own accord and not publicise it or ask the consumers to make extra contributions.

In-store Competitions

Consumers were undecided in the surveys as to whether there was any benefit for them to enter in-store competitions. However, in-store competitions appeared to be more favoured by the trade. Interviews conducted with the trade highlighted that competitions were mainly used to increase product awareness, gain retail support and gather market information. Competitions also were beneficial in helping to increase short-term sales. This is consistent with the findings in the literature, which revealed that competitions are an innovative way of increasing awareness and purchases of a product without disrupting the price / quantity equation of a brand (Peattie and Peattie 1993).

Mass Media Advertising

Mass media advertising was ranked only 7th by pregnant women; with 38% of women interviewed saying that there are too many adverts in magazines and on TV to pay attention to and they are just skipping over them. This was also apparent in the

literature, whereby Moses (2003) stated that consumers are no longer engaged by advertising communications because there is too much clutter. This is somewhat contradictory to the research conducted by Nielsen (2011), Women of Tomorrow, who found that women do take notice of TV adverts in order to be informed of new products on the market. Furthermore, the women interviewed stated that they would take the products that their healthcare professionals recommended to them even if they were not advertised on TV, in magazines or on the internet. The trade had a different opinion with regards to mass media advertising. Interviews with the trade revealed that the main reason that they embark on mass media advertising campaigns is to raise consumer awareness about their products. This is consistent with the literature which stated that mass media advertising was important because it helped to stimulate word-of-mouth communications (Bayus 1985).

Attractive Product Packaging

The interviews with the trade revealed that attractive product packaging was important to women and that women based their purchases on the 'look' of the product and less on the contents. This is consistent with the findings in the literature whereby it was stated that product packaging is almost as important as the product itself as it is the first impression that a consumer has of the product that matters (Goodenough 2006; Kotler and Keller 2009).

5.3.6.3 The Least Important Promotional Activities

Text Message and Email Adverts

Text message and email adverts were ranked 9th out of the 10 promotional activities available for consumers to choose from. These were found to be irritating by the consumers interviewed and more often than not were deleted or marked as "spam". This is consistent with the literature, whereby Morimoto and Chang (2006) found that consumers are becoming resentful towards text message and email adverts as they felt it was intrusive, untargeted and clogged up their mail boxes. The trade had a completely different opinion on text message and email adverts with 60% thinking

that consumers liked receiving text message and email adverts as they were informative.

Celebrity Endorsements

The least important and favoured promotional activity as perceived by pregnant women is celebrity endorsements. Across the whole study, celebrity endorsements were ranked as the least likely promotional activity to influence their decision making processes when making a purchase. Five out of the eight women interviewed felt that celebrities were superficial and were most likely being paid to promote the product and did not actually use it themselves. Research on celebrity endorsements has provided conflicting opinions and even if it does stimulate brand awareness it does not necessarily influence consumer purchasing behaviour (Alnawas 2010). The interviews conducted with the trade were also negative towards celebrity endorsements as they were found not to be credible. Focus groups held by one of the companies from the trade found that celebrity endorsements are only successful when targeted at the black youth in South Africa, especially for sporting apparel.

5.3.7 Summary of Findings of Research Question 1

Women who are planning to fall pregnant, who are pregnant, who are breastfeeding and who have children all seem to have similar opinions as to which promotional activities are most important in influencing their decision making processes.

The following promotional activities are most likely to influence the decision making processes of pregnant women -

- Recommendations by healthcare professionals;
- Recommendations by friends and family;
- Free samples;
- In-store price / quantity promotions; and
- Loyalty Programmes.

The following promotional activities may to some extent have an influence on the decision making processes of pregnant women -

- Consumer reviews;
- Charity affiliations;
- Mass media advertising;
- Attractive product packaging; and
- In-store competitions.

The following promotional activities are least likely to influence the decision making processes of pregnant women -

- Text message and email adverts;
- Eventing / Publicity; and
- Celebrity endorsements.

5.4 Research Question 2

How will demographic factors change the promotional activities needed to influence the decision making processes of pregnant women in South Africa?

The literature review conducted in Chapter 2, revealed that demographics such as age, race and pregnancy status may have some influence on the promotional activities that are most likely to influence the decision making processes of women. This, however, was not entirely apparent in the research conducted.

Very little difference existed in the rankings of the mix of promotional activities that are most likely to influence the decision making processes of women planning for a pregnancy, women who are pregnant, women who are breastfeeding, women with children, and women of different races, ages or even income levels.

As can be seen in Table 14, all women, regardless of demographic factors, rate recommendations by healthcare professionals and recommendations by friends and family as most likely to influence their decision making processes. This is consistent with the literature in that women begin their purchasing process by collecting information from people they trust and know, and who have had previous experience with the brand (Bayus 1985; Barletta 2003; Mitchell 2003).

Similarly, all women, regardless of demographic factors, rated text message and email adverts as well as celebrity endorsements as the least likely of all the promotional activities to influence their decision making processes. It was revealed in one of the interviews with one of South Africa's major retailers that celebrity endorsements only help stimulate sales in the younger black market. This is consistent with the literature review, as sports apparel manufacturers have found that they achieve great success in using celebrity endorsements to create a "buzz" around their products (Tiwari and Abraham 2010; Brajesh and Gouranga 2011). Sports apparel tends to be more appealing to the younger generation than the older generation.

Behavioural studies have been undertaken by one of South Africa's major retailers, using purchasing behaviour instead of demographics to cluster women into segments according to what is being put into their shopping baskets e.g. underwear versus cosmetics. Thus, marketers need to understand and listen to the needs of the consumers that they are targeting in order to determine the right mix of promotional activities that is in line with their purchasing behaviours (Koenderman 2005).

The cluster analysis conducted on the 292 respondents to the quantitative online and intercept surveys found that there were four clusters of women in the sample surveyed. Each cluster was identifiably different in their responses to the three factors, namely 'Trusted Recommendations', 'Advertising' and 'Added Value'. Furthermore, some differences in demographic factors also became apparent on closer investigation.

The survey revealed the following four clusters of women in South Africa –

- The Working Mommies:
    - These women are predominantly white with a household income ranging from R8,000 to R39,999;
    - The majority of these women have children and / or are breastfeeding; and
    - Their main source of information on new products is the trusted recommendations of healthcare professionals, friends and family who have had experience with the products.

- The Media Fanatic and Bargain Hunter Moms:
    - These women are mainly white with a household income ranging from R8,000 to R39,999;
    - The majority of these women also have children and / or are breastfeeding; but
    - Their main source of information on new products is from advertising in any form and they are very cost conscious and thus are always looking out for a good deal for their family.
- The Young and the Aspirant:
    - These women are mixed in race and income level;
    - The majority of these women do not have children and are planning to have children in the near future; and
    - They search around for information on new products from mixed sources i.e. they are open to the recommendations from healthcare professionals and friends and family, adverts across different platforms but at the same time are looking for good deals.
- The Trend Setting Moms:
    - These women are predominantly white and fall into a slightly higher income bracket from R20,000 to R40,000+ than the rest of the clusters;
    - The majority of these women have children and / or are breastfeeding; and
    - They feel that they do not need to look 'outside' their own experiences because they know which products to buy and thus are not interested in promotional activities.

The cluster of women which is best portrayed by the literature is 'The Young and the Aspirant'. These women are influenced by sales promotions and will shop around to find the best deal (Nielsen 2011 – Women of Tomorrow). They will make use of the internet to find answers to questions they have (Djukic 2001). These women also rely heavily on word-of-mouth recommendations when buying new products (van Zyl 2011).

This cluster of women is also to an extent consistent with one of Unilever's female market segments namely, 'Young black women', who are independent, successful and have an internal locus of control.

5.4.1 Summary of Findings of Research Question 2

Demographic factors are not likely to change the promotional activities needed to influence the decision making processes of pregnant women in South Africa. Section 3 of the Quantitative Online and Intercept Consumer Survey highlighted the importance of recommendations by healthcare professionals and family and friends, and the lack of importance of text and email adverts and celebrity endorsements across the demographic spectrum. The Cluster Analysis however revealed that there are four clusters of women in this market segment who each need to be marketed to in a slightly different way, namely -

- The Working Mommies, rely on 'Trusted Recommendations' when deciding on which products to buy;
- The Media Fanatic and Bargain Hunter Moms, rely on 'Advertising' and 'Added Value' when deciding on which products to buy;
- The Young and the Aspirant, are open to 'Trusted Recommendations', 'Advertising' and 'Added Value' when deciding which products to buy; and
- The Trend Setting Moms take no interest in promotional activities as they have the experience and know which products they should buy.

Thus, it would be beneficial for marketers to attempt to understand their target market by attempting to segment it using other segmentation bases such as geographical, psychographic or behavioural (Kotler and Keller 2009).

CHAPTER 6: CONCLUSIONS AND RECOMMENDATIONS

6.1 Introduction

The purpose of this research report was to understand and determine which combination of above-the-line and below-the-line promotional activities were most likely to influence the decision making processes of pregnant women in South Africa. Furthermore, this research may be used by marketers wanting to develop an effective integrated marketing campaign targeted to reach medium to high income earning pregnant women within South Africa, and who fall within the private healthcare sector.

6.2 Response to Research Question 1

Which promotional activities are most likely to influence the decision making processes and attract the attention of pregnant women in South Africa?

Table 27 consolidates the promotional activities available to marketers in order of importance from both the perspective of the consumer and trade. Marketers would benefit from making use of this combination of promotional activities in a campaign targeted to reach medium to high income earning pregnant women within South Africa, and who fall within the private healthcare sector. These promotional activities are those that are deemed to be essential for a successful campaign, but not necessarily the only promotional activities that need to be used.

As can be seen from Table 27, the most favoured promotional activities are those considered to fall under the category of below-the-line promotional activities. Below-the-line promotional activities appear to be favoured as they are more targeted and measurable.

Table 27: Key Promotional Activities in order of Importance to Marketers

No.	Promotional Activities	Key Influencer	Notes for Marketers
Top 5 Essential Promotional Activities for a Successful Campaign			
1	**Recommendations by Healthcare Professionals**	**Yes**	Need to get their 'buy-in' and support.
2	**Recommendations by friends and family**	**Yes**	Need to enhance their awareness.
3	**Samples to test**	**Yes**	Need enough product to be able to test, but not over sample.
4	**Price / quantity In-store promotions**	**Yes**	Ensure that consumers are enticed to make the purchase at store level.
5	**Loyalty programmes**	**Yes**	Help to maintain the customer base as well as builds loyalty.
Other Promotional Activities that may be Beneficial to Marketers			
	Attractive product packaging	**Nice to have**	Women like products that look good, and stand out on the shelves.
	In-store competitions	**Nice to have**	Helps to gain retail support, gondola ends and increases product awareness.
	Charity affiliations	**Nice to have**	Creates a 'feel good' factor for the brand.
	Consumer reviews	**Nice to have**	Gives consumers a general overview of the product and creates awareness.
	Mass media adverts	**Nice to have**	Helps to create consumer awareness and stimulates word-of-mouth.
Not likely to influence Consumer Decision Making			
	Eventing	**No**	Can be used to help create awareness but difficult to co-ordinate, resource intensive and difficult to measure.
	Text and email adverts	**No**	Can be used to create awareness but considered to be annoying and are generally untargeted.
	Celebrity endorsements	**No**	Seen to be superficial and not credible.

The quantitative and qualitative consumer surveys confirmed the notion that consumers are bombarded by advertisements and, thus, they have started to tune out when advertisements come onto TV and skip through them in magazines. This has also resulted in a lot of confusion for consumers, who have become decision numb as every marketer is trying to promote their product and by saying it is the best. Due to this confusion, consumers have started to turn to those that they deem to be the most reliable sources of information on new products; namely healthcare professionals as well as their friends and family. This is also apparent in the literature review (Bayus 1985; Barletta 2003; Mitchell 2003; Ainsworth 2011). Consumers believe that healthcare professionals, as well as friends and family have their best interests at heart, have tried and tested the products and have nothing to gain financially from making product recommendations. Word-of-mouth marketing is far more direct and personal than mass media marketing (Plummer 2007). This proves that word-of-mouth marketing is extremely important among women in South Africa (van Zyl 2011).

Samples are also very important to consumers, especially due to the economic downturn as it helps to reduce the risk involved with a purchase. This is particularly true for higher value items, such as, cosmetics and perfumes (Wu 2010). Women also like to see and feel products before they purchase them (Miller 1996). The dilemma for the trade is how many samples to hand out and in what quantity in order to give the consumer just enough product to be able to test whether they like it, but, at the same time not to overload them so that they do not have to purchase the product. Furthermore, it is important that the integrity of the samples that are handed out are maintained because, if not, it could result in the brand image being damaged.

The economic downturn has also resulted in consumers becoming more cost conscious, with middle class families having decreased levels of disposable income available to them (Naidoo 2011). Thus, the women of the households

are tending to opt for products which will give them greater value for their money spent. This was emphasized strongly in both the consumer interviews and quantitative surveys, with price / quantity promotions being ranked in the top five promotional activities being most likely to influence their decision making processes. Price / quantity promotions are also seen as beneficial from the trade's perspective as it helps to drive their sales volumes and get more feet into the stores. One of the major manufacturers of baby apparel in South Africa noted that with sales promotions comes reduced profitability and some consumers may even be less likely to pay the higher price for the product when the promotion ends. This is consistent with the literature (Jobber 1999).

Loyalty programmes are important to marketers because it helps them to maintain their customer base and keep customers loyal. This is consistent with the literature by Gull and Tariq (2011) who stated loyalty programmes are beneficial to retailers in that they help to retain current customers, promote brand loyalty and attract new customers. Loyalty programmes are also considered by consumers to be beneficial as they receive rewards for their loyalty. This is also apparent in the literature whereby research has found consumers are more likely to make purchases from stores that have some form of loyalty scheme attached to it (Cuneo 1998).

Thus, of all the promotional activities available to marketers marketing their products to pregnant women in South Africa, word-of-mouth marketing through family, friends and healthcare professionals, sampling, price / quantity promotions and loyalty programmes are considered to be most effective in influencing this target market's decision making processes. All five of these promotional activities are considered to fall under the banner of below-the-line promotional activities. These findings may account for why below-the-line promotional activities are beginning to attract more attention and marketing expenditure than above-the-line mass media marketing (Koenderman 2008).

6.3 Response to Research Question 2

How will demographic factors change the promotional activities needed to influence the decision making processes of pregnant women in South Africa?

The various demographic factors have not been found to have a major influence on the mix of promotional activities that are most likely to influence the decision making processes of pregnant women. Regardless of demographic factors, women consistently rate the recommendations of healthcare professionals, recommendations of friends and family, samples and price / quantity promotions as most likely to influence their decision making processes. Text message and email adverts as well as celebrity endorsements were rated by women as least likely to influence their decision making processes.

The Cluster Analysis revealed that there are four main clusters of women in this target market, who are influenced differently by the various promotional activities, namely-

- The Working Mommies, who are most likely influenced by 'Trusted Recommendations';
- The Media Fanatic and Bargain Hunter Moms, who are most likely influenced by 'Advertising' and 'Added Value';
- The Young and the Aspirant, who are most likely influenced by all types of promotional activities, 'Trusted Recommendations', 'Advertising' and 'Added Value'; and
- The Trend Setting Moms, who are not influenced by promotional activities and make use of their own insights and experiences when making product purchases.

Thus, it would be beneficial for marketers to segment this market based on other segmentation bases such as geographic, psychographic and

behaviouristic looking specifically at individual factors and group factors (Cant et al 2006; Kotler and Keller 2009).

6.4 Recommendations

The notion that below-the-line promotional activities are more influential in the decision making processes of pregnant women in South Africa than above-the-line promotional activities is not entirely true. The below-the-line promotional activities are the things that these women are being faced with on a daily basis, but, above-the-line mass media advertising creates the "desire" for the product subconsciously. Publicity and adverts are providing friends, family and healthcare professionals with the information they need to make informed decisions about the products that they are purchasing. This occurs so deep in consumers' subconscious minds that they are not even aware of it. Martin and Morich (2011) confirmed this notion and stated that consumers make use of both conscious and unconscious mental processes together with their experiences when making purchasing decisions.

Marketers would, thus, benefit from taking both Lavidge and Steiner's (1961) Hierarchy-of-Effects Model and Kotler's (2003) Buyer-Readiness Stages into account when developing a promotions campaign targeted at pregnant women in South Africa. This combined model ensures that not only is the product in the mind of the consumer, but that it actually results in a purchase.

Figure 14 on the following page, provides marketers with an integrated promotional mix which can be used to develop a marketing campaign targeted to reach medium to high income earning pregnant women within South Africa, and who fall within the private healthcare sector. This integrated promotional mix combines the above-the-line and below-the line promotional activities which are most likely to influence the decision making processes of pregnant women in South Africa.

Stages	Hierarchy-of-Effects Model	Kotler's Stages of Buyer-Readiness	Findings from this Research Report.	Type
Stage 1: **Cognitive Stage**	Awareness ↓ Knowledge ↓	Awareness ↓ Comprehension ↓	Charity affiliations – good for publicity and has a 'feel good' factor for consumers. Healthcare professional involvement. Adverts on TV, in magazines, on billboards and on the internet.	Above-the-line
Stage 2: **Affective Stage**	Liking ↓ Preference ↓ Conviction ↓	Conviction ↓	Recommendations by friends and family, as well as healthcare professionals. Sampling. Exhibitions and Product demonstrations. Attractive product packaging.	Below-the-line
Stage 3: **Behaviour Stage**	Purchase	Ordering ↓ Reordering	In-store price / quantity deals. Competitions. Loyalty programmes.	

Figure 14: An Integrated Promotional Mix for Marketers wanting to influence the decision making processes of Pregnant Women in South Africa

Source: Adapted from Lavidge and Steiner (1961) and Kotler (2003)

The integrated promotional mix proposed in Figure 14, provides marketers with a holistic communications campaign that covers each of the major modes of communication.

The detail of the integrated promotional mix is contained in Table 28 on the following page.

Table 28: A Marketing Campaign targeted at Pregnant Women in South Africa

Role of Promotional Activity	Promotional Activity	Specific Medium	Motivation	Level of Importance
Increases Brand Awareness and Stimulates Word-of-mouth Communications	**Word-of-Mouth Marketing**	Detailing of Healthcare Professionals by Sales Representatives.	This is in order to get 'buy-in' and support from the healthcare professionals. Women trust their healthcare professionals more than any other source (Pekala 2011).	Very Important
	Mass Media Advertising	TV advertisements, newspapers and magazines. Note: Care must be taken in deciding which magazines to advertise in depending on the product type. This is to ensure that the consumer is being targeted at the right time i.e. pregnancy focussed magazines vs baby focussed magazines.	Women take notice of adverts on TV in order to be informed about new products also in South Africa. The top three sources of information about new brands is TV, then newspapers and lastly magazines. (Nielsen 2011-Women of Tomorrow).	Important
	Public Relations and Publicity	Charity affiliations that are closely linked to the product being marketed i.e. supporting a charity that provides shelter to abused and abandoned women and children.	Builds a 'feel good' factor into the brand. Stimulates word-of-mouth communications through friends and family. Silverstein and Sayre (2009) found that women prefer to purchase brands from companies that are charitable.	Nice to have

Role of Promotional Activity	Promotional Activity	Specific Medium	Motivation	Level of Importance
Creates Interest and Desire in the Brand	**Sales Promotion**	Sampling Note: Samples must be big enough for a customer to be able to test. Samples must be packaged appropriately to maintain their integrity. Care must be taken not to hand out too many samples and thus a fixed sampling to sales ratio must be maintained.	Allows women to try before they buy which decreases the risk of the purchase. Women like to see and touch the actual product before purchasing (Miller 1999).	Very Important
	Exhibitions / Expos and Product Demonstrations	Participating in product exhibitions such as the Baby Expo, The Baba Indaba and The Living and Loving Baby Show.	Allows direct interaction with target market and creates important brand image associations (Kotler and Keller 2009).	Important
	Attractive Packaging	Bright colours and feminine designs.	Consumers' first impression of product. Women like beautiful looking products. Can help to create brand equity (Kotler and Keller 2009).	Nice to have
Evokes a Purchase Response	**Sales Promotion**	Price / quantity promotions at store level.	Important when launching a product and helps to drive sales.	Very Important
	Competitions	In-store competitions. Note: Competitions must be easy to enter.	Helps to secure retail support and gondola space in-store. Attract new users and increase usage by repeat customers (Peattie and Peattie 1993; Jobber 1999) Increases purchases of a product without disrupting the price (Peattie and Peattie 1993).	Important
	Personal Selling	In-store promoters	Promote product in-store and answer important product related questions.	Nice to have

Role of Promotional Activity	Promotional Activity	Specific Medium	Motivation	Level of Importance
Maintain Customer Base	**Loyalty Programmes**	Loyalty programmes at store level are more effective than product specific loyalty programmes. Note: They must be easy to participate in and provide real added value for the consumer.	Trying to capture the attention of new customers can cost up to five times more than retaining satisfied customers (Kotler and Keller 2009).	Very Important

As seen in Table 28, although in isolation, some promotional activities, such as, public relations and publicity appear to be less important than others, many of these are important components in building brand reputation as part of the total marketing effort. Obviously, the marketing mix used by the marketer will depend on the marketing budget and the anticipated return on the investment that is required.

6.5 Conclusion

The purpose of this research was to determine which combination of above-the-line and below-the-line promotional activities influences the decision making processes of pregnant women in South Africa, who fall within the private healthcare sector.

The need for this research stemmed from the dilemma that marketers are faced with regarding which promotional activities to embark on when marketing their products to pregnant women in South Africa. Further complicating their dilemma is the need for marketers to make use of promotional activities that are measurable and provide an immediate return (Abratt, Bendixen and du Plessis 1995; Koenderman 2008).

The overall conclusion was that both above-the-line and below-the-line promotional activities are important in marketing brands to pregnant women in South Africa. Thus, the use of a combination of promotional activities works better than any single promotional activity used alone (Keller 2001; Schultz 2004). The above-the-line promotional activities are necessary for creating brand awareness and help to stimulate word-of-mouth communications (Bayus 1985). The below-the-line promotional activities are necessary to 'close the deal' and provide some form of measurability to the performance of the campaign (Koenderman 2008). Furthermore, marketing campaigns need to be developed in partnership with the target audience and trade in order to be successful (Doyle et al 2006).

6.6 Suggestions for Further Research

A number of concepts have been uncovered during this research report that could possibly warrant further investigation. The following topics are suggested for further research:

- A qualitative study discussing the effects of individual and group factors on a consumer's purchasing behaviour.
- A qualitative study looking at the benefits of social marketing, such as, on facebook and twitter and how this may influence a consumer's purchasing behaviour.
- A qualitative study that investigates which communication media are most likely responsible for generating word-of-mouth communications.
- A quantitative study together with companies from the trade, measuring the effectiveness of sampling and whether it in fact is directly linked to increased sales.

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APPENDIX A – QUANTITATIVE ONLINE AND INTERCEPT CONSUMER SURVEY

1. Letter for Participation in Survey

November / December 2011

Dear Participant

Re: Participation in Research

I am an MBA student at Wits Business School and am currently completing my research report in order to fulfil all requirements for this qualification. My research topic is entitled: "Effective marketing to pregnant women in South Africa."

In order to gather information on this topic, I kindly request that you fill in the attached survey. The survey will involve answering a number of questions relating to promotional activities within the South African context.

By participating in this survey you could stand the chance of winning one of five R2000 prizes. Terms and conditions apply, and can be viewed at www.pregomega.co.za.

All information of a personal nature will be kept confidential in this research report.

I thank you in advance for your assistance and look forward to engaging with you further.

Yours faithfully,

Anastasia du Toit

Tel: 083 327 5650

E-mail: Anastasia@georen.co.za

2. Questionnaire for Online and Intercept Surveys

Section 1: Demographics

Name: _____ Surname: _____

Contact Number: _____ E-mail:_____

Please mark the box which represents your personal information –

Race: White ☐ Black ☐ Coloured ☐

Indian ☐ Asian ☐

Age: 15-24 ☐ 25-34 ☐ 35-49 ☐ 50+ ☐

Gender: Female ☐ Male ☐

Income Level:

Please mark the box that represents your family's total monthly household income -

Below R2,500 ☐ R2,500 -R4,999 ☐ R5,000-R7,999 ☐

R8,000-R10,999 ☐ R11,000-R19,999 ☐ R20,000-R29,999 ☐

R30,000-R39,999 ☐ R40,000-R49,999 ☐ R50,000+ ☐

Status:

Please mark the appropriate box -

I am Pregnant, **OR** Yes ☐ No ☐

Breastfeeding / have had a baby in the past 18 months Yes ☐ No ☐

Have other children of my own? Yes ☐ No ☐

Section 2: 15 Statements on a five point Likert Scale

Please indicate your level of agreement or disagreement for each of the statements below relating to a fast moving consumer good e.g. a nutritional supplement, nappies, food items etc.

No.	Statement	Strongly Disagree	Disagree	Undecided	Agree	Strongly Agree
1	In my opinion mass media advertising, like adverts in magazines and on TV are far more reliable sources of information on new products than opinions of my friends and family.					
2	I am more likely to purchase a product that my doctor has recommended that I use, than a product advertised on TV.					
3	I prefer purchasing a product from a retail store after having it demonstrated to me than making a product purchase over the Internet.					
4	I would rather purchase a product that was recommended to me by my family or friends than purchase a product which a celebrity has endorsed.					
5	I am more likely to purchase a product whereby I am able to enter a competition than purchasing a product where a donation is granted to a charity.					
6	I would be more motivated to purchase a product if an In-Store promoter demonstrates and details it to me rather than if I received a text message advert encouraging me to make the same purchase.					

No.	Statement	Strongly Disagree	Disagree	Undecided	Agree	Strongly Agree
7	I would be more inclined to purchase a product if I were given a discount for such product, than if I were given a free sample to try it out before purchase.					
8	An advert in a newspaper would be more likely to encourage me to purchase a product than if I were to receive an email advertising the same product.					
9	I would be more motivated to purchase a product and be part of a Loyalty programme than if a friend were to recommend purchasing a particular product.					
10	An advert in a catalogue which I received in the post would be more likely to convince me to purchase a product than receiving a product advert via email.					
11	I would be more inclined to purchase a product that has been recommended on an online product review (such as from a chat room or blog) than if my doctor were to recommend it.					
12	A product recommended at an expo or exhibition which I could try out would be more likely to motivate me to purchase it than a product advertised in a health review in a magazine.					
13	I am more likely to purchase a product recommended in a TV advert than one which offers me two for the price of one deal, in a retail store.					

No.	Statement	Strongly Disagree	Disagree	Undecided	Agree	Strongly Agree
14	Attractive product packaging is more appealing to me than a product that is highly advertised in magazines.					
15	I am more likely to purchase a product whereby I have been given a sample of the product to try than just if the product has been widely advertised over the internet.					

Section 3: 10 Ranked Statements

Please rank the following promotional activities in order, from 1 to 10, in terms of their importance to you as a consumer wanting to purchase a product.

(1 being your most favourable and 10 being your least favourable)

TV, Magazine, newspaper and billboard adverts ☐

Price / Quantity In-store promotions ☐

Receiving samples ☐

Products being endorsed by celebrities ☐

Firms actively being affiliated with a charity ☐

Store loyalty programmes ☐

Product recommendations by friends or family ☐

Product recommendations by a healthcare professional ☐

Product information on the Internet such as consumer reviews ☐

Receiving text message or email adverts on the product ☐

APPENDIX B – QUALITATIVE PERSONAL INTERVIEW QUESTIONNAIRE FOR THE TRADE

1. Letter for Interview Request with the Trade

January 2012

Dear _____

Re: Request for an Interview

I am an MBA student at Wits Business School and am currently completing my research report in order to fulfil all requirements for this qualification. My research topic is entitled: “Effective marketing to pregnant women in South Africa”.

In order to gather information on this topic, I kindly request that you allow me the opportunity of a one hour interview with you at your company’s premises. The interview will involve answering a number of questions relating to above- and below-the line promotional activities within the South African context.

I will gladly provide you with a summary of my findings upon completion of my research and will also ensure that any key information will be kept confidential in the research report.

I thank you in advance for your assistance and look forward to engaging with you further.

Yours faithfully,

Anastasia du Toit

Tel: 083 327 5650

E-mail: Anastasia@georen.co.za

2. Questionnaire for Personal Interview with the Trade

Date of Interview: _____Time of Interview (start / end): _____

Name and Surname of Person interviewed: _____

Company which Interviewee represents: _____

Title of Interviewee at Company: _____

Questions

Question 1:

Please confirm your understanding of above- and below-the line promotional activities?

Question 2:

(a) Which would be more important in the mind of a consumer, above- or below-the line advertising / promotional activities and why?

(b) What role does each play?

Question 3:

(a) Which promotional activities does your company embark on to attract the attention of pregnant women and how do they do this?

(b) Do you think these promotional activities are successful in attracting their attention?

(c) If so, which activities have been most successful?

Question 4:

Can I please have your opinions of the advantages and disadvantages and use of the following promotional activities within your company?

- TV, Magazine, newspaper and billboard adverts
- Price / Quantity in-store promotion
- Receiving samples
- Products being endorsed by celebrities
- Firms actively being affiliated with a charity
- Store loyalty programmes
- Product recommendations by friends or family
- Product recommendations by a healthcare professional
- Product information on the internet such as consumer reviews
- Receiving text message or email adverts on the product

Other promotional activities that I have not mentioned that you believe are important?

Thank you for being so kind as to allow me to interview you and for participating in this research.

APPENDIX C – RESULTS FROM QUANTITATIVE ONLINE AND INTERCEPT CONSUMER SURVEYS

Table 29: Mean and Frequency Comparison of Likert Scaled Statements

No.	Statements	Statement Reversals	Mean	Most Common Response	Frequency
1	In my opinion mass media advertising, like adverts in magazines and on TV are far more reliable sources of information on new products than opinions of my friends and family.	In my opinion, friends and family are far more reliable sources of information on new products than mass media adverts, like adverts in magazines and on TV.	3.25	4	139 (48%)
2	I am more likely to purchase a product that my doctor has recommended that I use, than a product advertised on TV.		4.38	5	141 (48%)
3	I prefer purchasing a product from a retail store after having it demonstrated to me than making a product purchase over the Internet.		3.84	4	79 (27%)
4	I would rather purchase a product that was recommended to me by my family or friends than purchase a product which a celebrity has endorsed.		4.24	4	132 (45%)
5	I am more likely to purchase a product whereby I am able to enter a competition than purchasing a product where a donation is granted to a charity.		2.90	2	95 (33%)

No.	Statements	Statement Reversals	Mean	Most Common Response	Frequency
6	I would be motivated to purchase a product if an In-store promoter demonstrates it to me rather than if I received a text message advert encouraging me to make the same purchase.		3.76	4	141 (48%)
7	I would be more inclined to purchase a product if I were given a discount for such product, than if I were given a free sample to try it out before purchase.		3.13	2	90 (31%)
8	An advert in a newspaper would be more likely to encourage me to purchase a product than if I were to receive an email advertising the same product.	An email advert would be more likely to encourage me to make a product purchase than if I were to see an advert in a newspaper encouraging me to make the same purchase.	3.35	4	134 (46%)
9	I would be more motivated to purchase a product and be part of a Loyalty programme than if a friend were to recommend purchasing a particular product.		2.95	2	100 (34%)
10	An advert in a catalogue which I received in the post would be more likely to convince me to purchase a product than receiving a product advert via email.		2.92	2	106 (36%)

No.	Statements	Statement Reversals	Mean	Most Common Response	Frequency
11	I would be more inclined to purchase a product that has been recommended on an online product review (such as from a chat room or blog) than if my doctor were to recommend it.		2.28	2	136 (47%)
12	A product recommended at an expo or exhibition which I could try out would be more likely to motivate me to purchase it than a product advertised in a health review in a magazine.		3.60	4	147 (50%)
13	I am more likely to purchase a product recommended in a TV advert than one which offers me a two for the price of one deal, in a retail store.	I am more likely to purchase a product that offers me a two for the price of one deal in a retail store, than a product that is recommended in a TV advert.	3.38	4	132 (45%)
14	Attractive product packaging is more appealing to me than a product that is highly advertised in magazines.		2.99	2	96 (33%)
15	I am more likely to purchase a product whereby I have been given a sample of the product to try than just if the product has been widely advertised over the internet.		4.14	4	160 (55%)

Table 30: Full Frequency Table of all Consumer Responses

	Strongly Disagree	Disagree	Undecided	Agree	Strongly Agree
Rating Scale	(1)	(2)	(3)	(4)	(5)
St 1 R	7%	27%	8%	48%	9%
St 2	0%	3%	4%	44%	48%
St 3	2%	11%	16%	45%	26%
St 4	1%	3%	9%	45%	42%
St 5	9%	33%	28%	23%	9%
St 6	1%	11%	19%	48%	21%
St 7	8%	31%	17%	29%	15%
St 8 R	4%	19%	24%	46%	8%
St 9	7%	34%	24%	28%	7%
St 10	4%	36%	29%	24%	6%
St 11	21%	47%	17%	14%	2%
St 12	2%	17%	16%	50%	15%
St 13 R	4%	20%	21%	45%	10%
St 14	5%	33%	27%	25%	9%
St 15	1%	3%	9%	55%	32%

Table 31: Summary of Ranks for Consumer Responses

Promotional Activities	Above-the-line			Below-the-line						
Categories	**A**	**B**	**C**	**D**	**E**	**F**	**G**	**H**	**I**	**J**
Overview - Combined Sample of Female Participants						**Count**		**106**		
Mean	5.80	8.98	5.73	4.68	4.36	5.58	3.02	2.65	6.59	7.69
Mode	5	10	5	3	3	6	2	1	8	9
Frequency	20%	67%	22%	18%	24%	21%	47%	52%	23%	30%
Median	6	10	5	4.5	4	6	2	1	7	8
1 (a) Ranks According to Race - White						**Count**		**72**		
Mean	5.86	8.86	5.93	4.19	4.49	5.39	3.26	3.06	6.49	7.56
Mode	5	10	5	3	4	6	2	1	9	9
Frequency	19%	64%	18%	26%	22%	21%	39%	43%	19%	28%
Median	6	10	6	4	4	6	2	2	7	8
1 (b) Ranks According to Race – Black and Coloured						**Count**		**26**		
Mean	5.05	9.76	5.67	5.86	3.95	6.14	2.43	1.48	7.10	7.52
Mode	4	10	5	7	3	5	2	1	8	9
Frequency	23%	77%	35%	42%	38%	23%	65%	69%	35%	38%
Median	5	10	5	7	3	6	2	1	8	8
1 (c) Ranks According to Race - Indian and Asian						**Count**		**8**		
Mean	7.38	9.00	4.25	5.75	4.00	6.13	2.50	1.63	6.38	8.00
Mode	7	10	3	4	4	6	2	1	8	9
Frequency	25%	63%	38%	25%	25%	38%	63%	75%	25%	25%
Median	7.50	10	4	5.50	3.50	6	2	1	7	8.5

Promotional Activities	Above-the-line			Below-the-line						
Categories	**A**	**B**	**C**	**D**	**E**	**F**	**G**	**H**	**I**	**J**
2 (a) Ranks According to Age – 15-24						**Count**		**9**		
Mean	5.67	9.56	4.56	5.44	5.11	5.11	2.78	1.00	7.67	8.11
Mode	6	10	3	7	6	3	2	1	9	9
Frequency	56%	78%	33%	44%	22%	33%	67%	100%	44%	33%
Median	6	10	4	6	5	4	2	1	8	8
2 (b) Ranks According to Age – 25-34						**Count**		**80**		
Mean	6.01	8.90	5.88	4.59	4.36	5.55	2.93	2.88	6.41	7.61
Mode	8	10	5	3	4	6	2	1	8	9
Frequency	18%	64%	25%	16%	23%	24%	43%	45%	20%	29%
Median	6	9	5	4	4	4	2	1	5	7
2 (c) Ranks According to Age – 35+						**Count**		**17**		
Mean	5.07	9.53	5.67	4.47	3.53	5.73	3.33	2.33	7.13	8.20
Mode	5	10	8	4	3	7	2	2	8	9
Frequency	41%	76%	24%	24%	29%	24%	59%	59%	29%	35%
Median	5	10	6	4	3	6	2	2	8	8
3 (a) Ranks According to Income Level - <R7,999						**Count**		**15**		
Mean	5.07	9.07	4.80	5.13	5.27	5.47	2.33	2.47	7.07	8.53
Mode	6	10	5	7	4	5	5	1	8	9
Frequency	33%	67%	27%	47%	27%	27%	27%	53%	33%	40%
Median	6	10	5	6	5	5	5	1	8	9

Promotional Activities	Above-the-line			Below-the-line						
Categories	**A**	**B**	**C**	**D**	**E**	**F**	**G**	**H**	**I**	**J**
3 (b) Ranks According to Income Level – R8,000-R19,999								**Count**		**22**
Mean	5.64	9.36	5.55	4.50	4.41	6.05	2.68	2.09	6.82	7.91
Mode	5	10	6	3	3	5	2	1	8	9
Frequency	23%	82%	23%	27%	23%	18%	55%	68%	41%	50%
Median	5.5	10	5.5	4	4	6	2	1	8	9
3 (c) Ranks According to Income Level – R20,000-R39,999								**Count**		**41**
Mean	5.98	8.98	6.71	4.41	3.76	5.51	3.12	2.68	6.15	7.71
Mode	5	10	8	3	3	6	2	1	9	7
Frequency	22%	63%	24%	20%	37%	20%	44%	46%	24%	22%
Median	6	10	7	4	3	6	2	2	7	8
3 (d) Ranks According to Income Level – R40,000+								**Count**		**20**
Mean	5.75	8.3	4.85	5.2	4.65	4.95	4.00	3.8	6.95	6.85
Mode	5	10	4	3	7	3	2	1	7	9
Frequency	30%	55%	15%	20%	20%	20%	30%	35%	25%	20%
Median	5.5	10	4.5	5	4	4.5	3.5	2.5	7	7.5
4 (a) Ranks According to Women Planning a Pregnancy								**Count**		**32**
Mean	6.06	8.63	5.97	4.66	4.19	5.25	2.88	2.66	6.91	7.81
Mode	6	10	5	3	3	3	2	1	9	9
Frequency	28%	59%	22%	28%	22%	22%	56%	56%	28%	28%
Median	6	10	6	4	4	5	2	1	7.5	9

Promotional Activities	Above-the-line			Below-the-line						
Categories	**A**	**B**	**C**	**D**	**E**	**F**	**G**	**H**	**I**	**J**
4 (b) Ranks According to Pregnant Women						**Count**		**25**		
Mean	6.80	9.28	5.92	4.52	4.32	6.28	2.60	1.80	5.80	7.80
Mode	8	10	5	7	3	6	2	1	4	9
Frequency	24%	64%	24%	20%	28%	36%	48%	60%	24%	28%
Median	7	10	6	4	4	6	2	1	5	8
4 (c) Ranks According to Breastfeeding Mothers						**Count**		**50**		
Mean	5.4	8.72	5.7	5.18	4.56	5.4	3.22	2.86	6.56	7.52
Mode	5	10	5	4	3	4	2	1	9	9
Frequency	22%	70%	18%	20%	70%	20%	48%	54%	22%	32%
Median	5	10	5	5	4	5	2	1	7	8
4 (d) Ranks According to Women with Children						**Count**		**61**		
Mean	5.49	8.77	5.77	4.85	4.43	5.49	3.11	2.70	6.92	7.61
Mode	5	10	5	4	3	6	2	1	9	9
Frequency	28%	67%	18%	20%	31%	18%	54%	57%	26%	28%
Median	5	10	5	4	4	6	2	1	7	8

Key: A = Mass media promotions such as adverts in magazines, newspapers and on billboards and TV;

B = Celebrity endorsements of products; C = Charity affiliations or sponsorships;

D = In-store price / quantity promotions; E = Free samples to test before making a product purchase;

F = Store of product loyalty programmes; G = Product recommendations by friends and family;

H = Product recommendations by healthcare professionals;

I = Product reviews by consumers on the internet in the form of chat rooms and blogs;

J = Products advertised via text messages or emails.

Table 32: 99% and 95% Confidence Intervals as per Friedman Ranks

Significance .01 / Significance .05	Mass Media Adverts	Price / Quantity Promotions	Samples	Celebrity Endorsements	Charity Affiliations	Loyalty Programmes	Recommendations by Family / Friends	Recommendations by Healthcare Professionals	Consumer Reviews	Text and Email Adverts
Mass Media Adverts	-	No	No	Yes	No	No	Yes	Yes	No	Yes
Price / Quantity Promotions	No	-	No	Yes	No	No	Yes	Yes	Yes	Yes
Samples	Yes	No	-	Yes	No	No	No	Yes	Yes	Yes
Celebrity Endorsements	Yes	Yes	Yes	-	Yes	Yes	Yes	Yes	Yes	No
Charity Affiliations	No	No	Yes	Yes	-	No	Yes	Yes	No	Yes
Loyalty Programmes	No	No	No	Yes	No	-	Yes	Yes	No	Yes
Recommendations by Family / Friends	Yes	Yes	Yes	Yes	Yes	Yes	-	No	Yes	Yes
Recommendations by Healthcare Professionals	Yes	Yes	Yes	Yes	Yes	Yes	No	-	Yes	Yes
Consumer Reviews	No	Yes	Yes	Yes	No	No	Yes	Yes	-	No
Text and Email Adverts	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	No	-

APPENDIX D – RESULTS FROM QUALITATIVE CONSUMER INTERVIEWS

<u>Table 33:</u> Consumer Responses to Qualitative Interview

Promotional Activities	Consumer Responses	Frequency of Response	Frequency as a %
Mass media adverts such as TV, magazine, newspaper and billboard adverts.	• Consumers are bombarded by adverts. • Annoying information overload. • Consumers get decision numb. • Each advert ranks their product as being number one; this is confusing for the consumer. • Does not pay attention to adverts and skips through them without looking at them with PVR. • Hardly watches TV or looks at Magazines. Thus it would be difficult to get attention from this reader. Waste of valuable time. • Nothing to back it up. Marketing unsubstantiated. • If I wanted a product I would do the research myself and not rely on adverts.	2 2 2	25% 25% 25%
Price / quantity In-store promotions.	• Looks for value for money/good deal/price motivating. So many products on the market, will look at price. • Will look at price but will not necessarily buy the lowest priced item. • Especially relevant if product has been used before.	4 2 2	50% 25% 25%
Receiving product samples to test.	• Throw them away. • Not enough of the sample to see if it is worth buying. • With a new product, at least you can test before investing in the product.	2 5	25% 63%

Promotional Activities	Consumer Responses	Frequency of Response	Frequency as a %
Products being endorsed by celebrities.	• Superficial. They have been paid a lot of money to push a product and may not even use it. • Celebrities do not necessarily have good judgement and are not experts on the product. • May work for perfumes.	5 2	63% 25%
Firms actively affiliated with a charity	• Worthy cause, must be something related to the product itself. Good to help. There is a feel good factor. • In SA there is too much corruption going on. Do not know where the money is going. • It would motivate me if the company itself donated the money, not asked me to pay more. • Does not really make or break the deal.	3 2 3	38% 25% 38%
Product or store loyalty programmes	• Love to go to Woolworths and get a 10% discount on selected items. Get something back for nothing or for something you would do anyway. • Too much administration involved. Tedious. Vouchers are so minimal. • Retail store loyalty programmes are better than product specific ones.	6 2	75% 25%
Product recommendations by friends / family	• Word of mouth best form of advertising. Tried and tested. Nothing to gain from recommending the product. Know what you like. • Not necessarily experts. Will try and force their views on you.	8	100%
Product recommendations by a healthcare professional	• Reliable source of info. Tried and tested. Knowledgeable people who know what they are talking about. People do not question their doctor. • Hope they have unbiased opinions.	7	88%

Promotional Activities	Consumer Responses	Frequency of Response	Frequency as a %
Product information on the internet such as consumer reviews and blogs	• Only if it is additional info on product. • Too easy to drop information. • Do not know people's interests. It may not be the same as yours. • Will give a general overview of product. • Manufacturers' web sites are good to look at for information. • Do not trust as it could have been made up.		
Receiving text message and email adverts on products	• Do not open adverts if I do not know who it is from. Delete / Spam. • Only read if it is of interest. • Do not have time. • False information. • Irritating as it is an invasion of one's personal space. Annoying.	2 2	25% 25%

APPENDIX E – RESULTS FROM QUALITATIVE TRADE INTERVIEWS

Table 34: Trade Responses to Qualitative Interviews

Promotional Activities	Trade Responses
Which is more important - Above-the-line (ATL) vs Below-the-line (BTL) promotional activities?	• ATL promotions are used for quick fix promotions to increase reach to the masses. • ATL builds presence and credibility, particularly with TV and magazines. • Pregnant mothers need to be engaged with, but at a credible level, such as with experiential marketing. • Adverts in magazines generate a better response in respect of in-store activities. • BTL marketing is most effective with the masses and consists of catalogues, print support, text messages and discounting. • BTL makes the product more exclusive. Goes directly to the customer who receives personal service.
Mass media adverts such as TV, magazine, newspaper and billboard adverts	• It is important that mass media adverts are measurable i.e. TV advert is screened on a T-shirt promotion with a 25% discount. The time frame needs to be short – over a weekend only in order to measure its success. Always need to look at return on investment. • Focus groups reveal that TV is still extremely important. • Pulls customers into the stores.
Price / quantity In-store promotions	• Price can drive volumes, but profitability is normally poor. • The Youth and Indian customers purchase more on price promotions. • Consumers are always looking for bargains. • The best performance in this segment is when a voucher is given which can be redeemed. • Consumers perceive that more expensive is better quality. Usually go in the middle of the range. • Difficult to increase price again of product after promotion.
Receiving product samples to test	• Sampling is an expensive promotional activity. Samples cost money and generally have to pay to put them in magazines and get them to the customer. • Over sampling can result in reduced sales because consumers have lots of samples and then do not need to buy the product. • The integrity of the samples can be problematic. • Sampling works well with the cosmetic houses. • Must time the handing out of samples correctly i.e. sunscreen in summer, nappies at the birth of a baby, prenatal vitamins straight after a woman finds out that she is pregnant.

Promotional Activities	Trade Responses
Products being endorsed by celebrities	• Works well for the young black market. • Celebrities are paid to endorse a product. May not even use the product. Thus, might not be credible. • If the celebrity is not credible the product will not be perceived as credible. • Only time when it may work is when a presenter on the radio talks about a product.
Firms actively affiliated with a charity	• Younger customers (15-24 age group) and lower income earners are more socially aware of charity. • Moms are more conscious of charities. • Can help to build a “warm fuzzy” brand perception. • Does not necessarily lead to a positive uptake of the brand.
Product or store loyalty programmes	• Loyalty programmes are important for retailers to maintain their customer base and keep customers loyal. • Lower income customers buy into loyalty programmes, but need to receive instant rewards. • Constantly need to engage with the consumer at the right time, thus resource intensive. • Encourage store loyalty, rather than brand loyalty.
Product recommendations by friends / family	• Extremely good source of credible information. • Nothing to gain from recommending a product.
Product recommendations by a healthcare professional	• Can give credibility to product.
Product information on the internet such as consumer reviews and blogs	• Customers look for content and do not see the advert banner. • Mothers read blogs and are influenced by them as they are hungry for information. • Internet penetration is however low.
Receiving text message and email adverts on products	• Text messages are good for advising customers of new stock arrivals. • Direct marketing can be expensive. • Customers like catalogues and brochures, especially black customers who will even shop from the catalogue and then go in-store to make their purchase. Catalogues are expensive to distribute. • Digital catalogues for mothers – not very successful. SA market not using digital platforms sufficiently to justify this method.

Promotional Activities	Trade Responses
Attractive product packaging	• Lower end of the market like bright colours. • Women like things that look good and are pretty. • Packaging makes a big difference when women are making purchases. • Packaging can become a talking point. • When women are giving gifts, packaging matters. • Visual marketing is extremely important. Internationally shop windows drive consumer purchasing.
In-store competitions	• The youth are more receptive to competitions. • Must not make it difficult for customers to enter or go into the store. Competitions need to be quick and easy. • Competitions help to gain trade support with in-store space and gondola ends. • There is a group of customers who will enter all competitions.
Publicity	• Media reviews are more important than customer reviews. • Good to give the media samples so that they can do write-ups about them. • Editorial coverage is extremely important.
Eventing	• This method of marketing is extremely expensive and there needs to be a constant focus on return on investment. • Evening with 50 top end customers. These activities do not lead to an immediate transaction.