

CONCLUSIONS AND RECOMMENDATIONS

7.1 INTRODUCTION

In this chapter, conclusions are drawn, recommendations made, and the findings of the study discussed. The focus then shifts to the objectives of the study and how they were realised. The chapter concludes with a brief overview of further areas of research that were identified during the study.

7.2 CONCLUSIONS

For purposes of the study, the population constituted all rugby supporters older than 16 years in South Africa. Since the population of the study was large, only a sample of the population was studied and stratified sampling was used. All 14 South African rugby provinces formed the first stratum, and thereafter, a minimum of 30 people were phoned in each province, using the telephone directories of each area as a sample frame. The respondents were randomly selected from directories of the various provinces. A total of 4 122 telephone calls were made, and 511 respondents participated in the research study. The

respondents were interviewed in all 14 rugby provinces of South Africa. (The methodology process was discussed in detail in chapter 5, and the findings of the research were dealt with in chapter 6.) Conclusions regarding the demographic profile and rugby support profile of the respondents, as well as their attitudes towards the industry and awareness of, associations with, loyalty to and perceived quality of the various rugby teams will be discussed next.

7.2.1 DEMOGRAPHIC PROFILE AND ATTITUDE TOWARDS THE INDUSTRY

The sample consisted of 65% males and 35% females, with 25% of the respondents older than 60 years. Most of the respondents were white (75,9%) and the remainder coloured (18,2%), African (3,9%) and Indian (2%). Since little research has been conducted into sport spectator behaviour in South Africa, the parameters of the South African rugby supporter were unknown and the sample of this study was therefore deemed representative (given the limitations of the study provided in chapter 1). One may thus conclude that white South Africans predominately support rugby in South Africa and is therefore the primary target market.

In chapter 6 it was shown that the rugby supporters who participated in the study rated themselves as extreme rugby supporters. There was found to be no significant difference in the degree of rugby support demonstrated between

males and females, but that there was a correlation between age and the degree of rugby support, namely that older respondents were more extreme supporters.

Another finding discussed in chapter 6 was that the rugby supporters were positive about the future of South African rugby and believe that there is plenty of rugby talent in South Africa. However, they felt somewhat negative about the management of rugby in South Africa. The younger rugby supporters were more likely to think that rugby is run professionally in South Africa. The female supporters were more likely to think that South African rugby has a lot of flair.

Hence, the following can be concluded from the demographic profiling and attitude towards the industry:

- *The respondents in this study were past the initial fan identification stage, and could be classified into either the identification or optimal internalisation stages of the fan identification process (see section 3.4.5). Hence older supporters were in the optimal internalisation stage. Age is thus a key determinant in the classification of support levels of South African rugby fans.*
- *Supporters in the identification stage had a higher level of connection with their rugby teams and hence distinct and exclusive preferences for a specific team. Because the older supporters were in the optimal internalisation stage they had formed a personal commitment, as well as deep personal empathy*

for their respective teams. They were resistant to any short term changes made to a team and were convinced that their team was the best compared with other teams. These older supporters were usually well informed, to the extent that they thought they were experts about their team. Hence, South African rugby supporters in general and more specifically older supporters identify and associate with, and have a personal commitment, and deep personal empathy for their teams.

- *With regard to the respondents' support behaviour, there was found to be no difference between the level of support of male and female supporters. The rugby supporters were positive about rugby talent in South Africa. However, they were negative about the management of South African rugby, a feeling evinced more by the older rugby supporters compared with the younger ones.*

7.2.2 RUGBY SUPPORT PROFILE

In chapter 6 it was evident that most of the respondents (23%) supported the Stormers (and had done so for an average of 16 years). The next most supported team were the Sharks (19%), with an average of 17 years support, the Bulls (15%) – 24 years support, the Cats (9,5%) – an average of 15 years of support, and the Springboks (7,9%) – an average of 22 years of support). The most admired team in South Africa was the Stormers (26%), followed by the

Sharks (22%), Bulls (21,5%), Blue Bulls (8,2%), Western Province (7,2%) and the Springboks (5%).

It could thus be concluded that the Stormers were the most popular team, because they were the most supported and admired by the respondents throughout the country. The Sharks were the second most popular team, followed by the Bulls. However, although the supporters classified these teams as Super 12 teams, the average time they had supported these teams was longer than 10 years. The Super 12 teams only originated in 1996, and it could therefore be concluded that the South African rugby supporters associated the Super 12 teams with the Currie Cup teams. Furthermore, since the respondents were asked to mention which team they personally supported, it became evident that most of the respondents mentioned regional (ie provincial rugby) teams. This does not, however, imply that rugby supporters in South Africa do not support the Springboks, but it could be concluded that the supporters thought about their provincial teams first – thus supporting the claims of provincialism in South Africa.

This study has also proven that, on average, respondents watched between seven and eight out of every 10 rugby games their team plays. The respondents, on average, attended only one out of every 10 games played at a stadium. Male rugby supporters were also more likely to attend a rugby game at a rugby

stadium. There is no correlation between the level of support and the willingness to attend a rugby game at a stadium.

The price respondents were willing to pay to watch a rugby game at a stadium correlates with the current market prices, except for games played by the Springboks. The supporters indicated that they were willing to pay approximately R89 on average for a ticket, while the market price for a Springbok test in 2003 was between R250 and R280 (see section 2.3.1.4). Supporters also indicated that they were willing to pay R184 on average for a rugby jersey. This price correlates with the current market prices for rugby jerseys, which retailed at approximately R200 in 2003 (Anon, 2003c:2), except for a Springbok rugby jersey, which retailed at R1 000 during the World Cup 2003 (see section 4.2.1.4).

One may conclude therefore that respondents followed the games of their teams closely, but did not really attend live rugby games. Although there was no significant difference between the level of support of male and female supporters, male supporters were more likely than female supporters to attend a rugby game at a stadium, compared with their female counterparts. Furthermore, the prices of rugby tickets and rugby jerseys correlated with what supporters were willing to pay, although this did not apply to Springbok rugby tickets and jerseys. The prices of Springbok tickets and jerseys were much higher and actually overpriced compared with supporters' perceptions of these prices.

7.2.3 BRAND EQUITY OF THE PROVINCIAL , REGIONAL AND NATIONAL RUGBY TEAMS OF SOUTH AFRICA

Brand equity (as discussed in chapter 4) is the differential effect of brand knowledge on customer response, and is formally defined as a set of brand assets and liabilities linked to a brand, its name and symbol, which add to or subtract from the value provided by a product or service to an organisation and/or to that organisation's customers. Brand equity is usually determined by measuring consumers' awareness of, associations with, perceived quality of and loyalty to brands. Since the determination of the brand equity of the various rugby teams was based on the respondents' awareness responses, brand awareness will be discussed first, followed by the conclusions regarding the brand equity of the provincial, regional and national rugby teams.

7.2.2.1 AWARENESS OF RUGBY TEAMS

In this study, rugby supporters mentioned the Stormers the most (33% first mentions) when asked which Super 12 team they were aware of. The Sharks were also frequently mentioned (22%). The Bulls (19%) were the third most first mentioned team, followed by the Cats (12%). It was clear, however, that the supporters were confused, because teams were mentioned as regional teams, when they are in fact provincial or national teams.

The most first mentioned provincial rugby team was Western Province (16%), followed by the Cheetahs (9,8%), Blue Bulls (10,8%), Golden Lions (9%) and the Natal Sharks (2,7%). Again, the respondents confused national, regional and provincial teams. Regarding national rugby teams, most respondents mentioned the Springbok team first (84%). The New Zealand national team (the All Blacks) and the Australian national team were also mentioned by respondents. The respondents, however, also referred to provincial and regional rugby teams.

From the above awareness results, it could be concluded that, although the rugby supporters in this study identified with their teams and considered themselves to be experts, they were confused about the various provincial, regional and national rugby teams (ie brands) of South Africa and did not know which ones belonged where. However, amongst those respondents who could mention the teams correctly, the regional rugby teams of which they were most aware, in order of awareness, were the Stormers, Sharks, Bulls and Cats. The provincial teams mentioned most included Western Province, the Blue Bulls, the Cheetahs, the Golden Lions, and the Natal Sharks. The Springboks were mentioned most as a national rugby team. No other national team was mentioned first by the respondents.

7.2.2.2 BRAND EQUITY OF RUGBY TEAMS

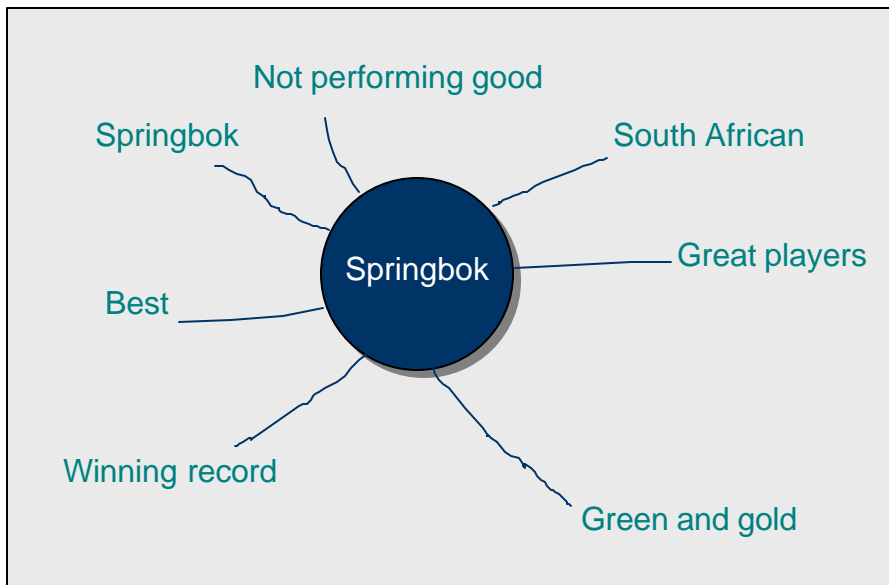
The following conclusions were drawn about the brand equity (ie brand awareness, association, perceived quality and loyalty) of the provincial, regional and national rugby teams of South Africa. The brands are discussed in rank order of their brand equity scores.

1) *Springboks*

The Springbok brand is the fourth oldest rugby brand in the country. The brand has gone through various modifications, of which the most significant was in 1992 when a protea was added to the design. The Springboks have played in green since 1896, and had the Springbok emblem since 1906 (see section 2.3.1.5).

Results in chapter 6 has shown that most of the respondents in this study were aware of the Springbok team. They were also aware of the colours and logo of the team. However, they had a fair amount of trust but not very much confidence in the team. They were, however, extremely loyal to the team. Their associations with the team are illustrated in figure 7.1 (as summarised by the researcher). The Springboks scored the highest brand equity of 6,0.

Figure 7.1 Springboks' associations

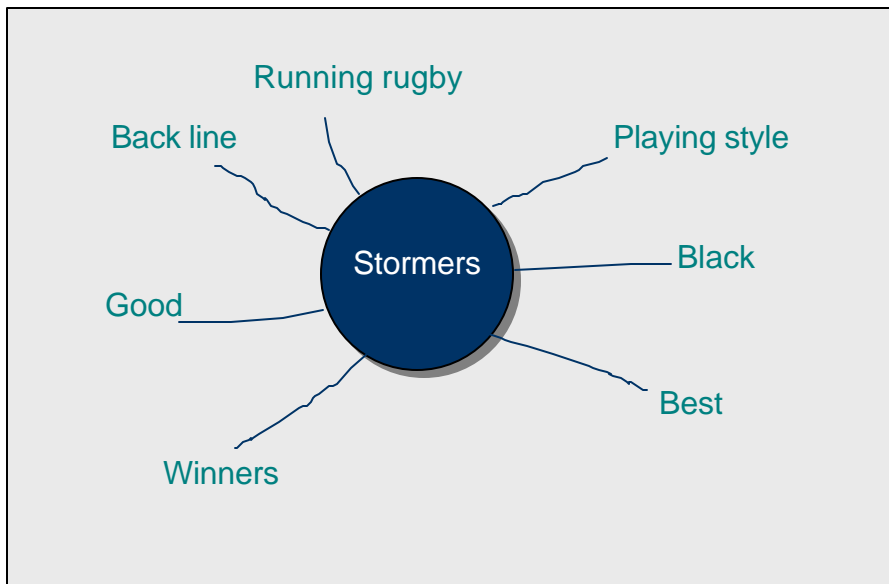


2) The Stormers

The Stormers' brand is a fairly young brand. This regional brand was introduced in 1998 (see section 2.3.1.4), and the colours of the team were only changed once. The Stormers have the best performance record in the Super 12 tournament among the South African regional teams.

The respondents were aware of the colour of the Stormers, but unaware of the logo. They had a great deal of trust and confidence in the team. The Stormers' supporters were extremely loyal to their team. Their associations are illustrated in figure 7.2 (as summarised by the researcher). The Stormers scored the highest brand equity amongst the regional teams, and were placed second, with a score of 5,337.

Figure 7.2 Stormers' associations

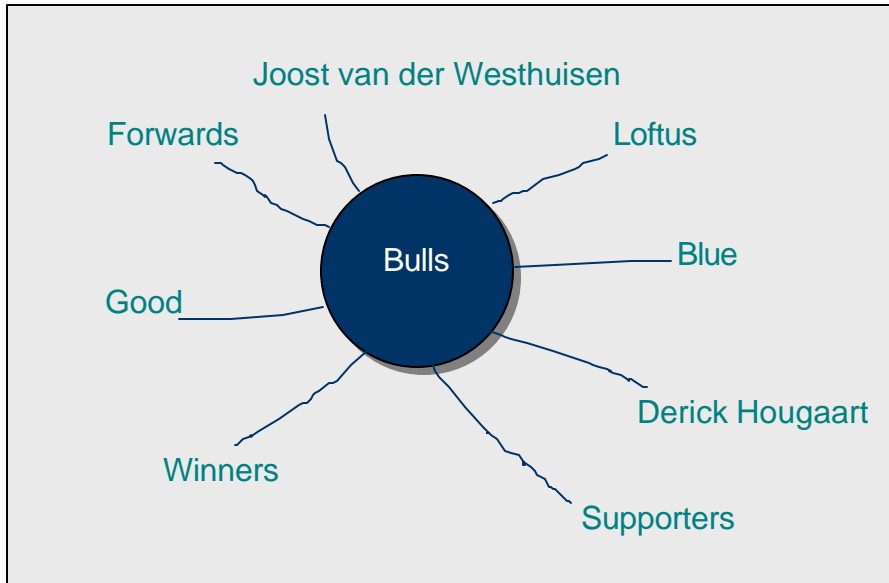


3) *The Bulls*

The Bulls' brand is also fairly young, and was introduced in 1998 (see section 2.3.1.4). This brand underwent various changes, in the logo and colours of the team. It has been proven that supporters associate this brand with the provincial Blue Bulls brand.

The respondents in this study were aware of the colour of the Bulls, but not of their logo. They also had a great deal of trust and confidence in the team. The Bulls' supporters were extremely loyal to their team and their associations are illustrated in figure 7.3 (as summarised by the researcher). The associations that the Bulls' supporters had were similar the associations of the Blue Bulls' supporters (see figure 7.5). The Bulls had the third highest brand equity score, namely 5,27.

Figure 7.3 Bulls' associations

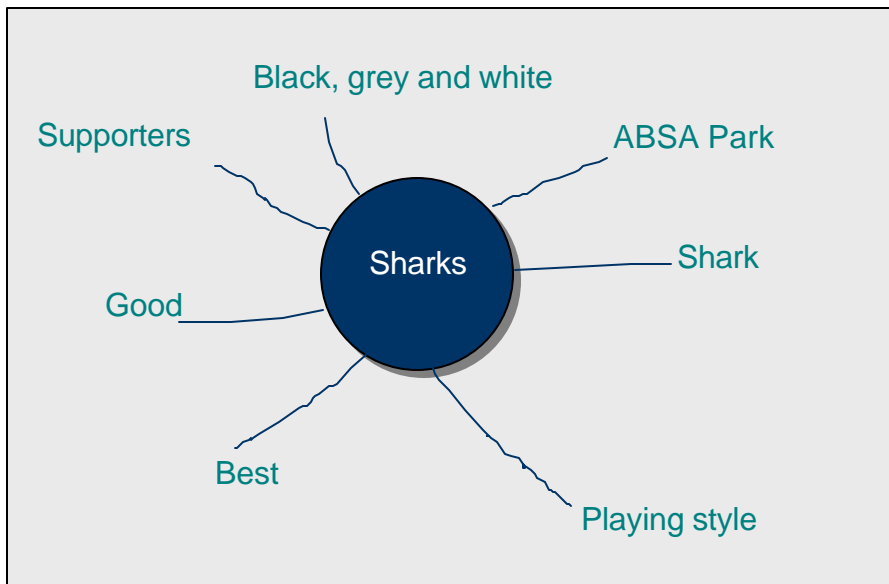


4) *The Sharks*

The Sharks' brand is a fairly young brand, which was introduced in 1998 (see section 2.3.1.4). The regional brand (grey, white and black) has modified the colours of the provincial brand (black and white) and has caused confusion among supporters.

The rugby supporters were aware of the colours and logo of the Sharks. They had a great deal of trust and confidence in the Sharks. The Sharks' supporters were extremely loyal to their team and their associations are indicated in figure 7.4 (as summarised by the researcher). The Sharks' brand scored the fourth highest brand equity, with a score of 5,011.

Figure 7.4 Sharks' associations



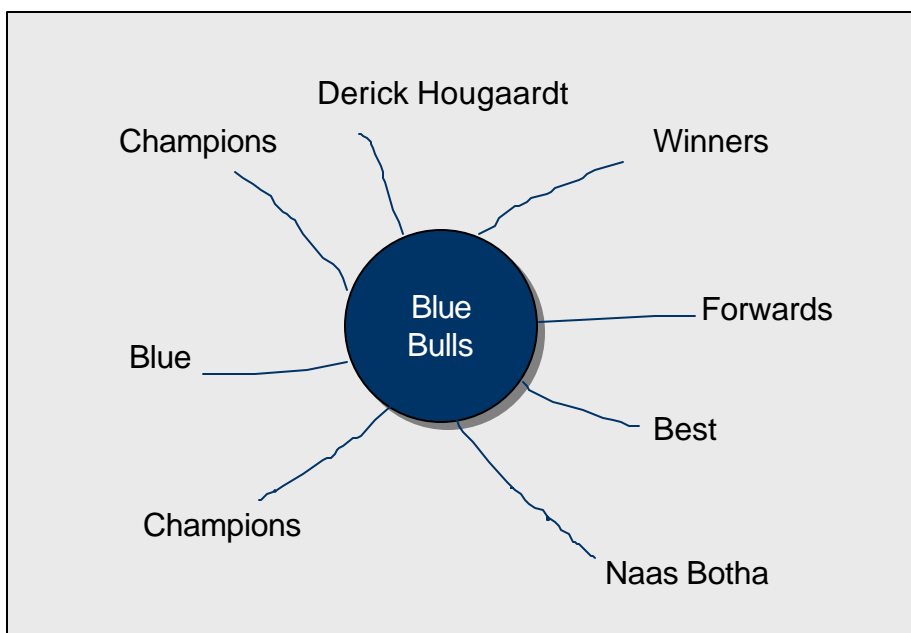
5) The Blue Bulls

The Blue Bulls' brand is about 65 years old. The brand was originally a Barberton Daisy, but has changed to the brand illustrated in figure 2.10 (see section 2.2.3.1). The daisy was, however, kept on the right-hand side of the jerseys. The Blue Bulls have won the Currie Cup the second most of all the provincial teams.

The rugby supporters in this study were aware of the colours of the Blue Bulls team, but unaware of the Blue Bulls logo. They appeared to have a great deal of trust and confidence in the team. The Blue Bulls supporters were extremely loyal to their team. Their associations with the team included various factors, but the most significant associations according to the researcher are illustrated in figure 7.5. The Blue Bulls had the fifth

highest brand equity score (and the highest for all provincial teams), namely 4,605.

Figure 7.5 Blue Bulls' associations



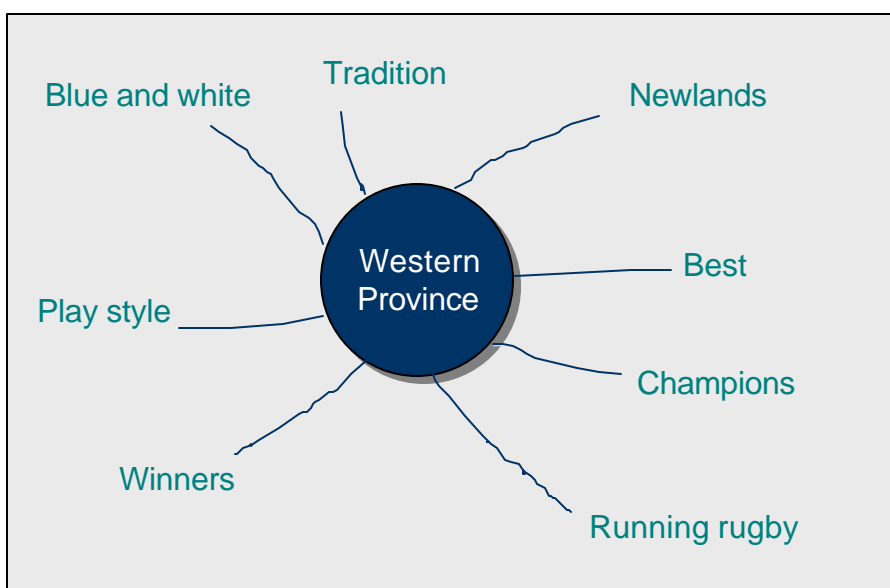
6) Western Province

Western Province is the oldest rugby brand in the country, being 121 years old (see section 2.2.3.14). The colours and the logo of this brand has remained the same when the other South African rugby unions introduced their new brands. Western Province has also won the Currie Cup the most in the history of the tournament (Colquhoun, 2003: 139).

The rugby supporters in this study indicated that they were aware of the colour, but not the logo of Western Province. They had a great deal of trust and confidence in Western Province. Western Province supporters

were extremely loyal to their team. Their associations are illustrated in figure 7.6 (as summarised by the researcher). Western Province scored a brand equity of 4,574, which is the sixth highest of all the South African teams, and the second highest of all the provincial teams.

Figure 7.6 Western Province associations

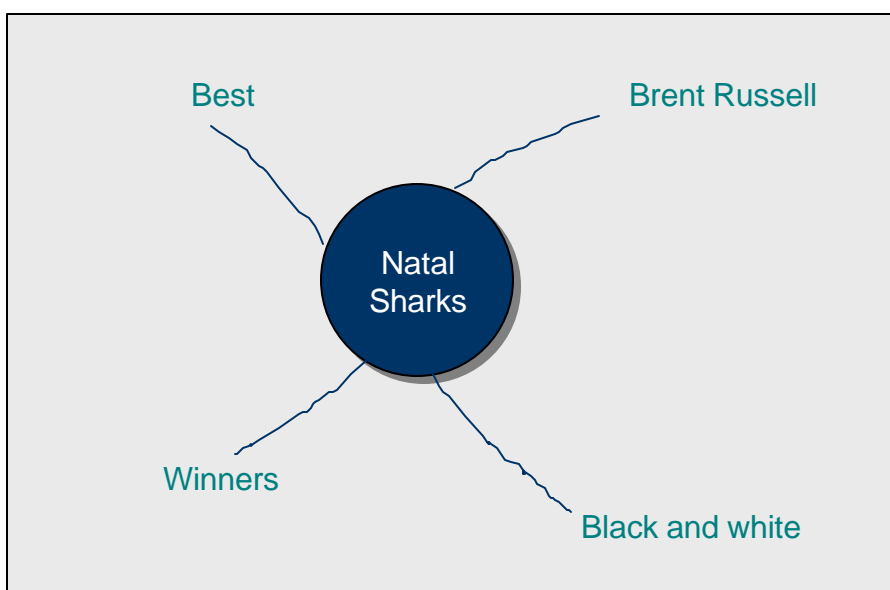


7) The Natal Sharks

The Sharks' brand was introduced in the early nineties, when it replaced the traditional wildebeest brand of the Natal Rugby Union (see section 2.2.3.12). Although the team has played in black and white for a number of years, rugby supporters in this study were confused with the grey of the Super 12 Sharks team. They were aware of the Sharks' logo. The respondents had a great deal of trust and confidence in the team. The Natal Sharks' supporters were extremely loyal to their team and their

associations with it are illustrated in figure 7.7 (as summarised by the researcher). The Natal Sharks ranked seventh with a brand equity score of 4,45.

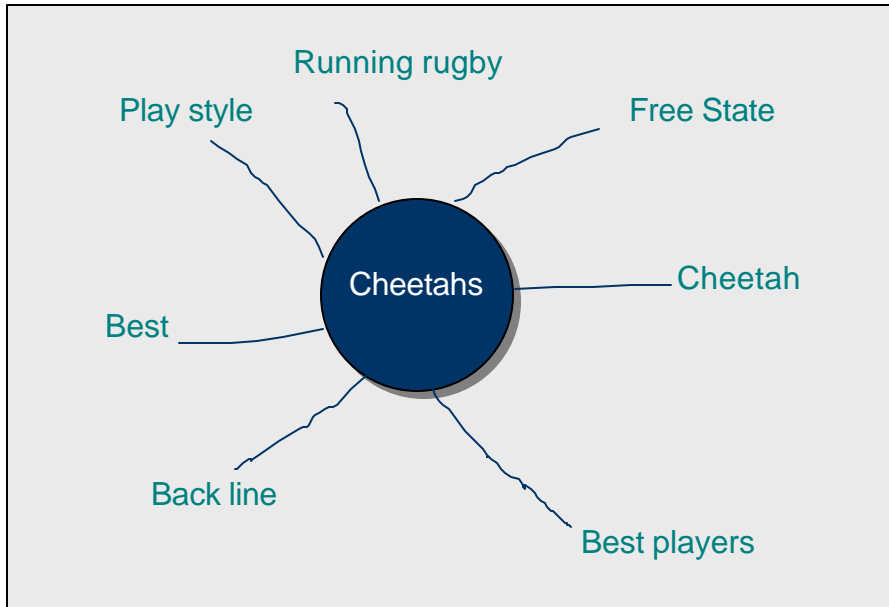
Figure 7.7 Natal Sharks' associations



8) The Cheetahs

The Free State Rugby Union is 109 years old (see section 2.2.3.6), and won the Currie Cup once as the Orange Free State (Colquhoun, 2003: 139). The rugby supporters in this study were aware of the colours and logo of the Cheetahs. They had quite a lot of trust and a great deal of confidence in their team. Cheetahs' supporters were also extremely loyal to their team. Their associations with the team are illustrated in figure 7.8 (as summarised by the researcher). The Cheetahs scored the eighth highest brand equity score, namely 4,434.

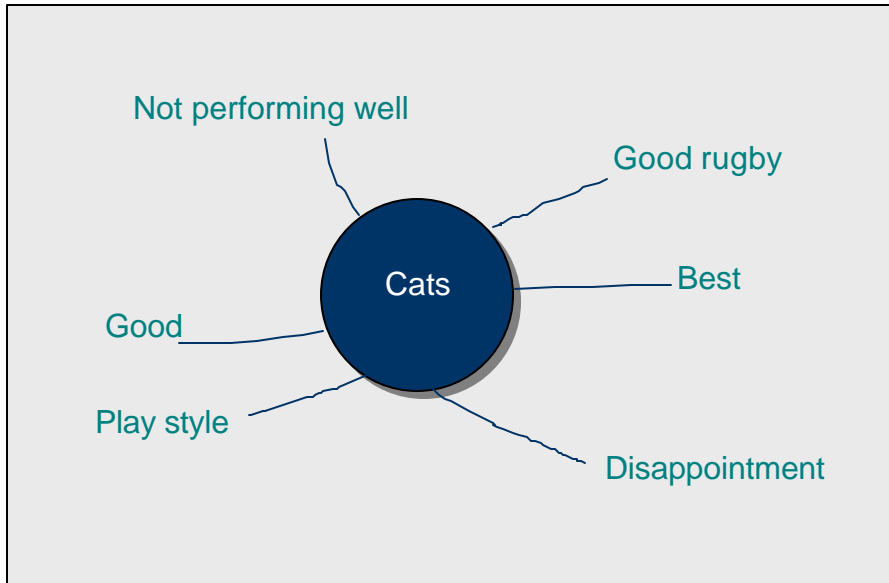
Figure 7.8 Cheetahs' associations



9) The Cats

The Cats brand also only originated in 1998, and went through various changes (see section 2.3.1.4). The rugby supporters in this study were unaware of the colour and logo of the Cats. Most respondents confused the colour of the Cats with the colour of the Golden Lions. The respondents did not have a great deal of trust and confidence in the team. The Cats' supporters were extremely loyal to their team. Their associations are illustrated in figure 7.9 (as summarised by the researcher). The Cats had the lowest brand equity score of all the regional teams, and were placed ninth, with a score of 4,289

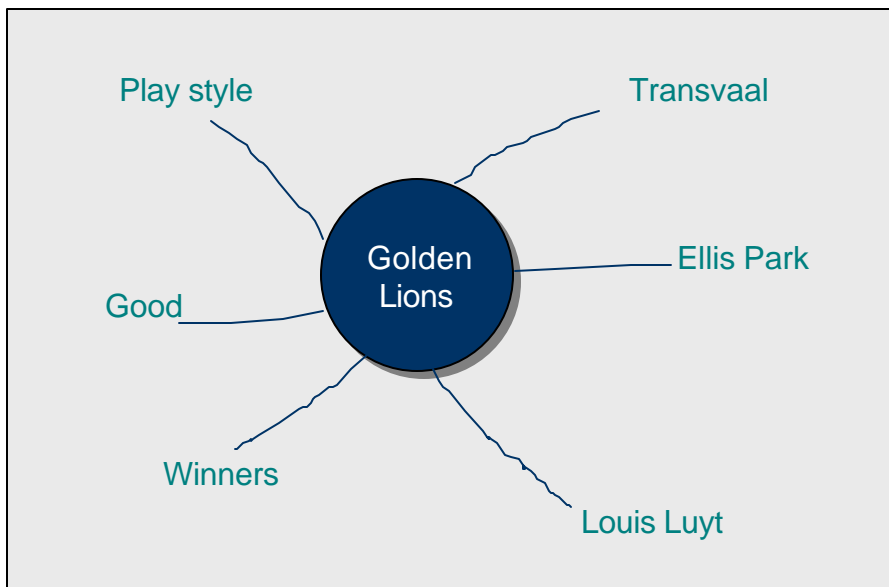
Figure 7.9 Cats' associations



10) *Golden Lions*

The Golden Lions Rugby Union is the fourth oldest rugby union in South Africa (see section 2.2.3.7). The respondents were aware of the colour and logo of the Golden Lions. They had quite a fair amount of confidence in the team. Golden Lions' supporters were also extremely loyal to their team. Their associations with the Golden Lions are illustrated in figure 7.10 (as summarised by the researcher). The Golden Lions achieved a brand equity score of 4,245, which placed them tenth.

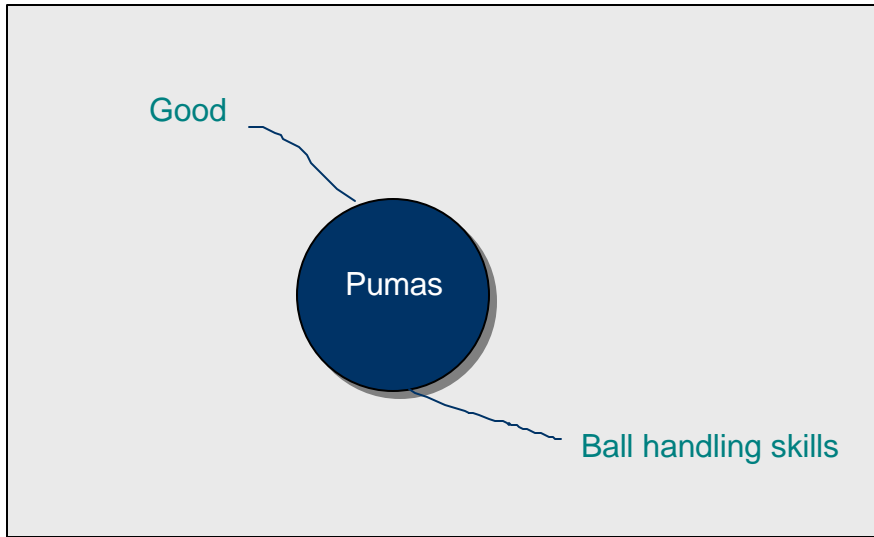
Figure 7.10 Golden Lions' associations



11) *The Mpumalanga Pumas*

The Mpumalanga Rugby Union is the youngest provincial rugby union in South Africa, being only 35 years old (see section 2.2.3.11). The respondents in this study were aware of the colour of the Pumas, but unaware of the logo. They had a great deal of trust but not much confidence in the team. The Pumas' supporters were extremely loyal to their team. Their associations with the team are illustrated in figure 7.11 (as summarised by the researcher). The Mpumalanga Pumas had the eleventh highest brand equity score, namely 3,556.

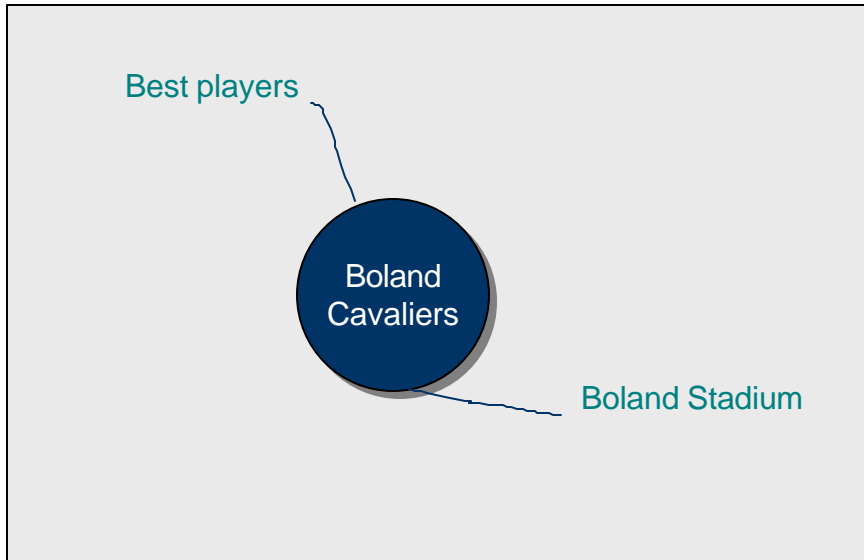
Figure 7.11 Mpumalanga Pumas' associations



12) *The Boland Cavaliers*

The Boland Rugby Union is also a fairly young rugby union, being only 65 years old (see section 2.2.3.2). The few supporters who indicated that they were aware of the Cavaliers were aware of the colours but not the logo. They did not appear to have much confidence in the team. The Cavaliers' supporters were extremely loyal to their team, and their associations with the team (as summarised by the researcher) are illustrated in figure 7.12. The Boland Cavaliers scored 3,433 in the brand equity score, which placed them twelfth.

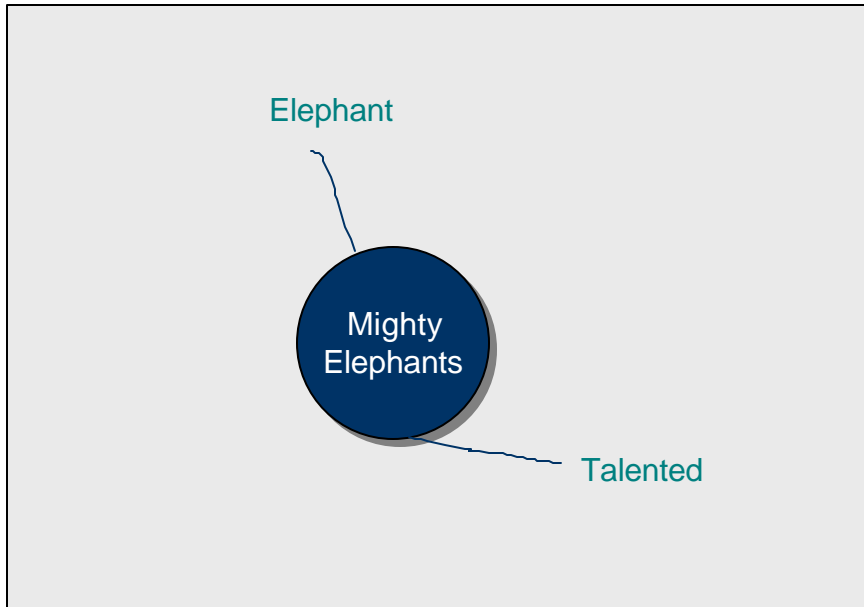
Figure 7.12 Boland Cavaliers' associations



13) *The Mighty Elephants*

The Eastern Province Rugby Union is the third oldest rugby union in South Africa (see section 2.2.3.4). The respondents who indicated that they were aware of the Mighty Elephants were aware of both the colours and logo of the team. They also had a fair amount of trust and confidence in the team. The team's supporters were extremely loyal to their team. Their associations with the team are illustrated in figure 7.13 (as summarised by the researcher). The brand equity score of the Mighty Elephants was 3,339, which was ranked thirteenth.

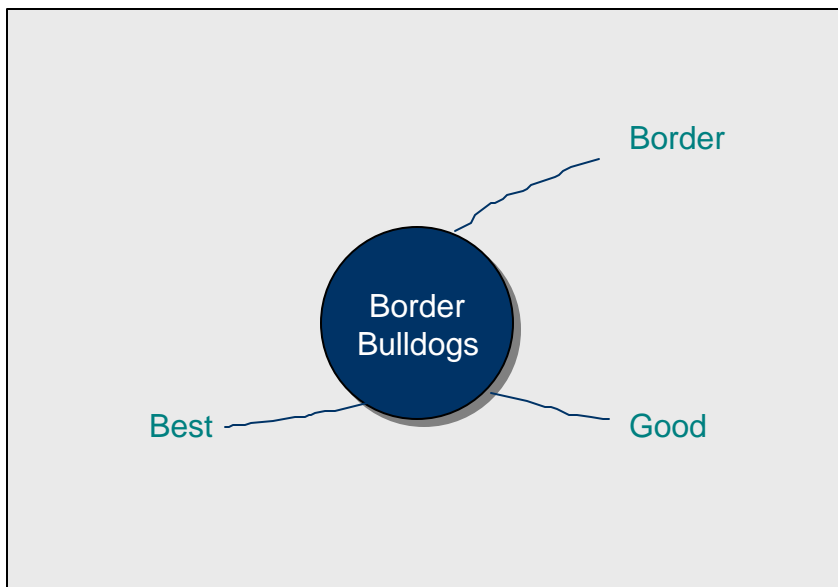
Figure 7.13 Mighty Elephants' associations



14) *The Border Bulldogs*

The Border Rugby Union was founded in 1891 (see section 2.2.3.3). The few rugby supporters who indicated that they were aware of the Border Bulldogs were unaware of the colours of the team, but aware of the logo. The respondents did not have a great deal of trust and confidence in this team. Bulldog supporters, however, were extremely loyal to their team. Their associations with the team are illustrated in figure 7.14 (as summarised by the researcher). The Border Bulldogs scored 3,201 in the brand equity score, which placed them fourteenth.

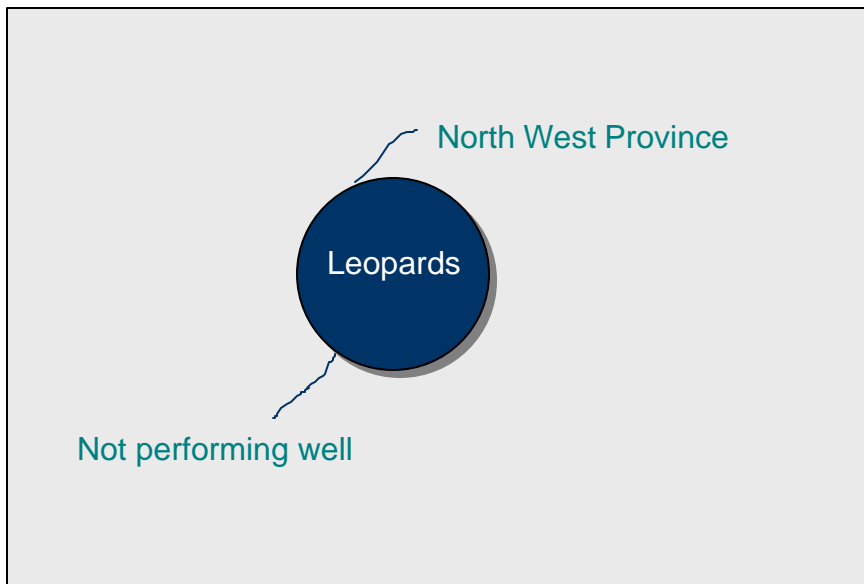
Figure 7.14 Border Bulldogs' associations



15) *The Leopards*

The Western Transvaal Rugby Union was founded in 1920 and recently changed their name to the Leopards Rugby Union (see section 2.2.3.10). The rugby supporters who indicated that they were aware of the Leopards were unaware of the Leopards' colours, but aware of the logo. They also did not have much trust and confidence in the team. The Leopards' supporters indicated that they were loyal to their team. Their associations with the team are illustrated in figure 7.15 (as summarised by the researcher). The Leopards achieved a brand equity score of 2,605, which placed them fifteenth.

Figure 7.15 Leopards' associations



16) *The Eagles*

The South Western District Rugby Football Union was founded in 1899 (see section 2.2.3.13). The few respondents who indicated that they were aware of the Eagles were unaware of their colours but aware of their logo. They had a fair amount of trust and confidence in the team. Since none of the respondents in this study supported the Eagles, no conclusions could be drawn about brand loyalty and brand associations. The Eagles scored the third lowest brand equity score, namely 1,697.

17) *The Griquas*

Griqualand West Rugby Union is the second oldest rugby union in South Africa, being 118 years old (see section 2.2.3.9). The few rugby supporters in this study who indicated that they were aware of the

Griquas, were aware of their colours, but unaware of their logo. They also did not have a great deal of trust and confidence in the team. Since none of the respondents in this study indicated that they supported the Griquas, no conclusions could be drawn about brand loyalty and brand associations. The Griquas scored the second lowest brand equity, namely 1,232.

18) *The Falcons*

Eastern Transvaal Rugby Union was founded in 1947 (see section 2.2.3.5). The few respondents who indicated that they were aware of the Falcons were aware of the colour and the logo of the team. They did not have much trust and confidence in the team. Since none of the respondents in the study supported the Falcons no conclusions could be drawn about the brand loyalty and brand associations of the Falcons' brand. The Falcons scored the lowest brand equity score, namely 1,195.

Owing to the fact that none of the respondents in this study mentioned the Griffons, or any other national brand as a first mention, the brand equity of the Springbok Sevens, South African U-23, South African A and South African U-21 teams could not be determined. It could thus be concluded that these brands were not strong. A summary of the brand equity scores is provided in table 7.1 (in ranking order).

Table 7.1 Brand equity and winning percentages of the provincial, regional and national rugby teams of South Africa

Team	Type of team	Brand equity score	Winning percentage 2000 to 2003
Springboks	National	6,000	50%
Stormers	Regional	5,337	45%
Bulls	Regional	5,270	20%
Sharks	Regional	5,011	37%
Blue Bulls	Provincial	4,605	78%
Western Province	Provincial	4,574	73%
Natal Sharks	Provincial	4,450	74%
Cheetahs	Provincial	4,434	53%
Cats	Regional	4,289	37%
Golden Lions	Provincial	4,245	60%
Mpumalanga Pumas	Provincial	3,556	41%
Boland Cavaliers	Provincial	3,433	52%
Mighty Elephants	Provincial	3,339	44%
Bulldogs	Provincial	3,201	34%
Leopards	Provincial	2,605	45%
Eagles	Provincial	1,697	35%
Griquas	Provincial	1,232	33%
Falcons	Provincial	1,195	45%

Source: Adapted from Colquhoun (2001, 2002, 2003 & 2004)

It is clear that the Springbok brand had the highest brand equity. This correlates with the fact that the market price of a Springbok rugby ticket was R196 more than the second highest rugby ticket in the market (see sections 4.2.1.4; 2.2.3.1

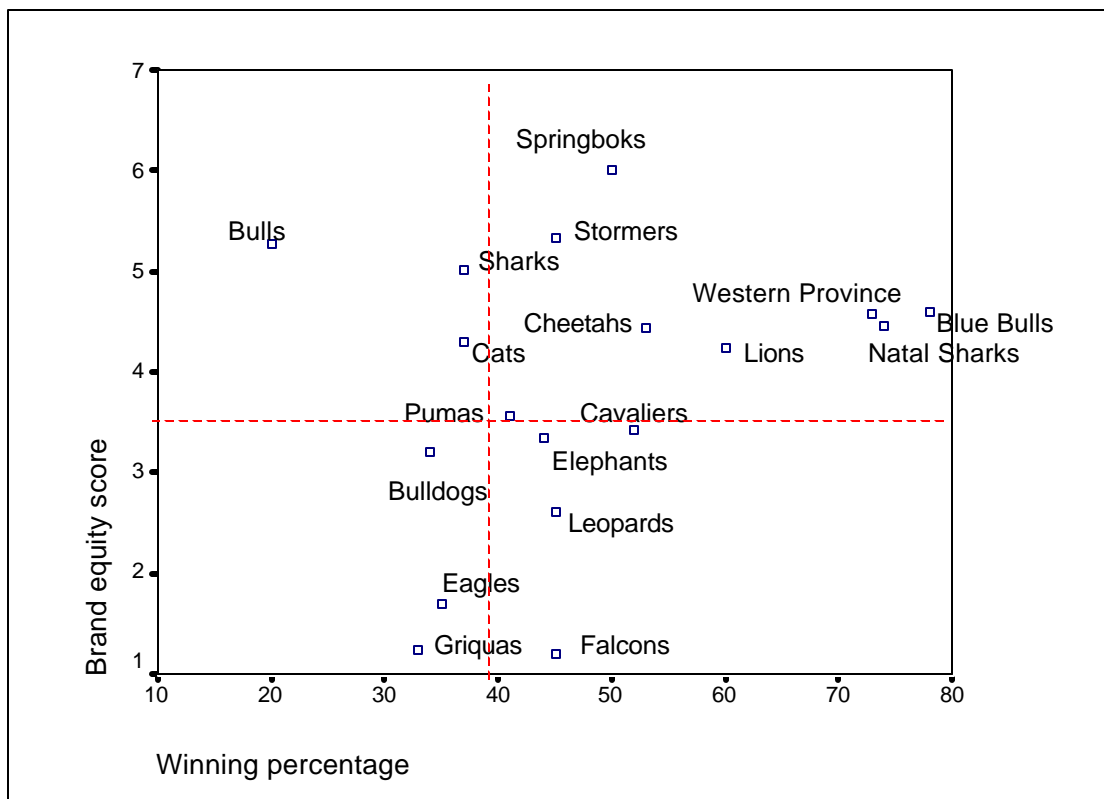
to 2.2.3.14). On all other aspects of Aaker's Brand Equity Ten model, the Stormers' brand scored higher. When comparing the brand equity scores with the winning performance of the various brands, it is evident that the Blue Bulls had the highest performance record in the last four years, followed by the Natal Sharks and Western Province (see table 7.1). The regional teams, however, had some of the lowest winning scores. *This contradicts sports marketing theory, according to which a good performance record of teams contributes to brand equity and indicates that the loyalty of supporters transcends the short term performance problems encountered by the teams.*

A large number of respondents in this study indicated that they had supported the Bulls, Cats, Sharks and Stormers for more than 10 years. The respondents were also confused about the various colours and logos of these teams, associating some of the colours and logos with those of the Currie Cup teams. Again, it could be concluded that the respondents associated the Super 12 teams with the Currie Cup teams (ie Sharks with Natal Sharks, Bulls with Blue Bulls, Stormers with Western Province and Cats with Golden Lions).

Hence, because there was confusion in the minds of supporters about the Bulls and the Blue Bulls, the Cats and the Golden Lions, the Sharks and the Natal Sharks, and finally, the Stormers and Western Province brands, it could be concluded that the Super 12 brands do in fact subtract value from the Currie Cup brands and creates confusion in the minds of the supporters.

Brand positioning is the part of the brand identity and value proposition that is to be actively communicated to target markets (Aaker, 1996:176). On the basis of this study, a brand positioning map can be drawn, which indicates the position of the various South African rugby brands according to their brand equity score and winning records. This map is illustrated in figure 7.16.

Figure 7.16 Positioning map of the various South African rugby teams according to their winning performance and brand equity score



The positioning map shows a team's brand equity score relative to its winning performance. The higher a team's brand equity score and winning performances, the further up and to the right in the top quadrant it will be

positioned. For example, Western Province has a high winning performance and relatively high brand equity score and is therefore positioned much higher and to the right than the Griquas who have a low winning percentage and an extremely low brand equity score.

7.4 RECOMMENDATIONS

The respondents in this study can be classified as being past the initial stage of the fan identification process. Most of the respondents can in fact be classified as being in the optimal internalisation stage of the fan identification process, which implies that they are well informed, to the extent that they think they are experts. However, although they regard themselves as experts, it is a worrying fact that they are confused about the various rugby brands of South Africa. This can be ascribed to the management of the various South African rugby brands.

The custodians of South African rugby, SA Rugby (see section 2.2.3) must reconsider their branding and develop branding strategies that will reduce or even eliminate the confusion amongst rugby supporters. These strategies should give clear definitions and information about the various brands, which will educate fans and eliminate confusion.

SA Rugby, together with every South African rugby union, should first strive to create brand awareness of their teams. When they focus on creating positive brand awareness in the minds of supporters, they will also establish

positive brand associations which, in turn, will contribute to a positive brand equity. The perceived quality of their brands could, firstly, be enhanced if management have an understanding of what quality means to rugby supporters. According to sports marketing theory (and confirmed by results in this study), good team performances (ie entertaining), and not necessarily winning performance, contribute to perceived quality which in turn contributes to brand equity. Positive perceived quality in the minds of supporters, will also build brand loyalty. Rugby managers should therefore strive to serve rugby supporters in a satisfactory way, by providing them with good performances on the field by their rugby teams.

Furthermore, since little research has been done in South African on rugby supporters, SA Rugby needs to conduct marketing research among its spectator consumers. Rugby supporters' needs and expectations should be investigated to ensure that rugby supporters and potential rugby supporters move from the identification stage to the final stage in the fan identification process.

The following specific recommendations are made in terms of building brand equity for the provincial, regional and national rugby teams of South Africa:

7.4.1 PROVINCIAL RUGBY BRANDS

The Currie Cup seems to be a sound platform for building brands. Western Province, which was the most popular provincial brand, is the team that has won the Currie Cup the most in South African rugby history. The brand is also the oldest rugby brand in the country. The Blue Bulls' brand is also extremely strong, with an excellent performance record, followed by the Sharks' brand, the Cheetahs' brand and the Golden Lions' brand. ***Management should, however, establish the needs of rugby supporters, by determining a rugby support profile.*** South African rugby supporters seem to be primarily loyal to their province, and then to their country. One may conclude that because of the occurrence of provincialism in South African rugby, fans associate more with the provincial teams. Unique traditions associated with the various provincial teams, and the fact that supporters identify with and empathise with their teams are all factors that have contributed to this phenomena.

The Currie Cup took on various forms (see section 2.3.1.1) since it was introduced. Table 7.1 showed that smaller rugby unions have low winning percentages and brand equity scores. ***SARFU should, once again, introduce a strength versus strength format for the Currie Cup tournament, where the top eight teams play in one pool, and the weaker teams play in another.*** This will grant smaller unions the opportunity to improve winning performances and build brand equity in their various provinces, since the smaller unions'

support base is more locally centred (ie in the area where their headquarter is located).

Finally, the management of the smaller provincial teams should focus on marketing their teams locally and not nationally. Most of the smaller provincial teams have a support base locally, and those supporters tend to be extremely loyal. By building brand awareness, positive brand associations, brand loyalty and positive perceived quality, the smaller rugby unions would be able to create positive brand equity locally that would draw sponsors.

7.4.2 REGIONAL RUGBY BRANDS

As discussed in chapter 2, the Super 12 has become a highly popular rugby tournament. However, in South Africa, the South African Super 12 teams have confused supporters and subtracted value from the Currie Cup brands. ***SA Rugby should differentiate these teams to ensure that supporters perceive them differently from the Currie Cup teams. Because the provincial brands are so strong, SARFU should reconsider the regional brands and should keep to the provincial brands. The top four Currie Cup teams from the previous year could, for example, participate in the Super 12, contracting players from the region to strengthen the team if needed and has been recommended by various commentators of the game.***

The South African teams have not performed well since the Super 12 was introduced. As stated earlier, the traditions and associations with the provincial teams in South Africa are so strong that even fans struggle to associate with the regional teams (as indicated in this study). In their minds the regional teams are the provincial teams. The Cats scored extremely low on brand equity compared with the other Super 12 teams, because they consist of the Golden Lions and Cheetahs. ***A fifth South African Super 12 team may be an option if SARFU decides to stick with the current regional teams in the Super 12 tournament making it possible for the Free State province to gather its own franchise while giving the Golden Lions provincial team the opportunity to establish their franchise at their home base (ie Johannesburg).***

One may conclude that part of the reason for South Africa's sub par performance in the Super 12 tournament is because teams do not have their own identities and traditions. ***SARFU should reconsider the format of the South African Super 12 teams (ie revert back to Currie Cup teams), and if there is no improvement they should reconsider South Africa's involvement in the entire tournament, because South African teams' performance detracts South Africa's rugby image as a whole.***

7.4.3 NATIONAL RUGBY BRANDS

There seems to be little confusion about the national rugby brand, but ironically, the Springbok brand is not the top brand in the minds of consumers.

Furthermore, SA Rugby should focus on the management of the Springbok team, because supporters are concerned about the professional side of rugby in the country.

South African rugby was faced with various challenges since it became professional in 1995. A main concern might be the fact that the Springboks had nine coaches in 11 years (Moodie, 2004: 2). In other successful rugby countries, such as England, this is not the case where they have had one coach that started coaching their team even before the 1999 Rugby World Cup. A second concern might be the continuous controversies surrounding SARFU and SA Rugby. Factors such as contract disputes, firing of coaches and claims of racism are constant news and media events. One may conclude that these factors will lead to players feeling uncertain, and fans feeling sceptic.

SARFU needs to reconsider the branding strategy of the Springboks. An aggressive marketing campaign needs to be launched that enforces the traditions of this century old brand while minimising the barriers of provincialism. During the 2003 Rugby World Cup such an attempt was made when the “our blood is green” campaign was launched. Fans, and the public,

should constantly be reminded that this is a truly South African brand. Uncertainties and doubts should be addressed and minimised through continuity in management, coaches and players. ***The Springbok, and all other national brands (ie Springbok Sevens, South Africa U-23, South Africa A and South Africa U-21), should be promoted. One way of promoting the brands, is to organise separate touring opportunities for teams, and invite touring teams to South Africa to play against them. International touring teams will also have the benefit that provincial teams will gain exposure by competing against them.*** This seems to be in SARFU's future plans for the 2005/2006 rugby season.

7.5 RECONCILIATION OF THE OBJECTIVES OF THE STUDY

The main objective of the study was to determine the brand equity of the provincial, regional and national rugby teams of South Africa. This objective was achieved in the study (see table 7.1). It was showed that the Springbok brand has the highest brand equity, followed by the Stormers, Bulls and Sharks.

The secondary objectives of the study were to

- To investigate South African rugby supporters' brand awareness of the various South African rugby teams. This was achieved in chapter 6.

- To examine South African rugby supporters' brand associations with South African rugby teams. This was achieved in chapter 6.
- To analyse South African rugby supporters' brand loyalty to South African rugby teams. This was achieved in chapter 6.
- Examine South African rugby supporters' perceived quality of the South African rugby teams. This was achieved in chapter 6.
- To identify future research, which is discussed next.

7.6 AREAS OF FUTURE RESEARCH

The following areas for future research were identified:

1. This study was conducted at the beginning of the 2004 Super 12 season. Although the respondents were asked to mention three Super 12 teams, three provincial teams and a national team, further research is necessary to determine whether the brand equity of the various teams would remain consistent if the same research study were to be conducted during other times of the year such as during the Currie Cup season or out of season.
2. In sports marketing theory, sports consumers consist of sports spectators and sport participants. Research among South African rugby players regarding their awareness of, associations with, perceived quality of and loyalty to the various provincial, regional and national South African rugby teams is also

necessary, to determine the true brand equity of the provincial, regional and national rugby teams of South Africa.

3. This study determined the brand equity of the various rugby teams of South Africa by applying Aaker's Brand Equity Ten Model to the provincial, regional and national rugby teams of South Africa. Further research into brand equity modelling will fine tune the model used in this study. Factors such as future brand earnings and cash flows are needed to determine a rand value for the South African rugby brands.

7.7 CONCLUSION

In this study the brand equity of the provincial, regional and national rugby teams of South Africa was determined, by investigating the brand awareness of, brand association of, perceived quality of and loyalty to the various South African rugby brands.

This study has illustrated that South Africa has a proud rugby tradition, with some well known and strong rugby brands, of which some are older than 100 years. South Africa was considered by many as a force to be reckoned with in the rugby world. However, poor performances on and off the field are challenging this. Factors such as constant controversies in management, hiring and firing of rugby coaches, poor performances of teams on the field, and uncertainty and confusion among fans contributed to uncertainties within the sport.

The next two years will be crucial for South African rugby. If the performance of the South African rugby teams in the Super 12 tournament does not improve during this time, South Africa's involvement in this tournament should be reconsidered. The constant sub par performances of South African teams are harmful to the image of South African rugby. Separate touring opportunities should be arranged for national teams to build brand awareness, brand association, brand loyalty and perceived quality.

SA Rugby should assist on developing branding strategies for the provincial, regional and national rugby teams. This will result in minimising brand confusion and building brand awareness, and positive brand association. Once this is done South African rugby will hopefully achieve the highest respect and admiration it so rightfully deserves.