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FINAL REPORT

Prepared for:

National Department of Tourism

**ANALYSIS OF THE SUPPLY OF TOURISM
PRODUCTS FOR THE FIVE KEY DOMESTIC
MARKET SEGMENTS**

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DEFINITIONS

Accommodation	Any facility that regularly (or occasionally) provides 'paid' or 'unpaid' overnight accommodation for tourists. Consist of products like hotels, motels, lodges, bed & breakfasts, guesthouses, backpackers, caravan parks, camping sites etc. (Knowles, 1994:5).
Activities	Attractions and events are resources that provide the raw material on which an activity depends and some attractions are a resource for a number of different activities (Swarbrooke, 2002). Activities are short term, ad hoc; using infrastructure that is not necessarily tourism-specific; planned or unplanned; can be done on 'spur of the moment'. Includes shopping, social activities, nightlife, fun, relaxation, adventure, non-professional sports activities, visiting a spa, bird watching, cultural exploration (DTGS, 2011).
Air Transport	Network carriers have extensive route coverage, regular schedules and are often part of international alliances and codeshares. Low cost carriers serve niche markets in geographic regions. Charter carriers generally serve pre-booked tours.
Attractions	A designated permanent resource which is controlled and managed for the enjoyment, amusement, entertainment, and education of the visiting public (Middleton, 1988). May or may not charge an admission fee (Walsh-Heron & Stevens, 1990). State-owned assets either at national, provincial or local government level, that are important for tourism e.g. museums, heritage sites, nature reserves, resorts, etc. (DTGS, 2011) Categories include natural (based on features of the natural environment) cultural (based on man's activities); and special types (artificially created) (Inskeep, 1991). Distinguish between primary (the main reason for taking a trip) or secondary (places visited on the way to the primary attraction) (Swarbrooke, 2002).
Authenticity	"An original experience that is true to reality". In tourism terms, a want to experience a different way of life; a manifestation of the identity of a people or a group of people (authenticity); the opposite of globalization and its resulting standardization; the discovery of places untouched by modernism; maintaining traditional methods and ways of life; travel with added value and quality of experience (Laliberté, 2005).
Backpackers	Aimed at the budget traveller and generally attracts younger people. It consists of dormitory bedrooms and shared bathrooms, lounges and kitchens. Private bedrooms and light meals may be available (Hostel Management, 2012).
Bed & breakfasts	Small businesses which are owner occupied/managed that give a genuine feel of the destination. Bed & Breakfasts are private family homes which offer a small number of rooms in the house.



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Budget hotels	This rapidly developing form of accommodation is normally located on major routes and near highway service areas and exits. They offer limited facilities to accommodate the 'on-the-road' traveller and have more extensive parking facilities (Johns, 1995:9, 329)
Buses and coaches	Luxury buses and coaches are particularly important modes of transport for tourism. Buses refer to intercity travel, while coaches refer to charter or tour group travel.
Caravan & Camping	Accommodation in touring or static caravans, chalets or tents at a camping terrain. Caravan and camping sites have upgraded their facilities with en-suite bathrooms, better kitchen areas, under cover standing spots and camping spots that have electrical sockets. It is an inexpensive means of holidaying (Cooper, 2012:176; Knowles, 1994:44; Johns, 1995:12).
Convenience & Grocery Stores	Grocery stores offer a wide variety of food products and general merchandise items like stationery, beauty care products and cleaning supplies. A large number of grocery stores are part of national and regional chain groups. Convenience stores offer commonly used food basics such as soft drinks and ready-prepared foods. Convenience stores are often part of a franchise or are independently owned and are open for most of the day and on public holidays (Payne, M. 2012).
Customer service	Qualified and capable staff with the right attitude (enthusiastic, motivated); time management (e.g. queuing); access to management (for complaints); opportunities created for visitor feedback.
Educational & Interactive	An experience that allows the visitor to gain knowledge or understanding of an object or concept through the senses or the mind (adapted from thefreedictionary.com) that may involve the communication or collaboration of people or things (e.g. the visitor and a display/machine/screen). Can either be mutually (both entities) or reciprocally (one entity) active and allows or involves the exchange of information or instructions (adapted from vocabulary-vocabulary.com). The attraction/event that, in addition to the educational tourism market, also appeals to a segment for whom education and learning are an important way to use their leisure time (Ritchie, 2003).
Events	Planned events are spatial-temporal phenomenon, and each is unique because of interactions among the setting, people, and management systems. Much of the appeal of events is that they are never the same, and you have to 'be there' to enjoy the unique experience fully; if you miss it, it's a lost opportunity. Planned events are all created for a purpose (Getz, 2008). Categories of events applicable to a leisure tourist context: <ul style="list-style-type: none"> ✓ Sport event ✓ Music events ✓ Lifestyle events (e.g. cuisine festivals; outdoor expo's; baby shows; gardening shows; stokvels etc.)



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Events (continued)	<ul style="list-style-type: none"> ✓ Cultural events (including religious gatherings e.g. ZCC) ✓ Markets (fresh produce, crafts, etc.) ✓ Special events: sardine run, etc. <p>The DTGS puts an emphasis on the use of local events to address seasonality problems, geographic spread, activation of school and sports tourism, leveraging on community led savings clubs/stokvels, community beneficiation and creating a culture of tourism amongst South Africans.</p>
Excitement & Escape	<p>The desire to seek exciting experiences (sensation seeking) is defined as “the seeking of varied, novel, complex, and intense sensations and experiences, and the willingness to take physical, social, legal, and financial risks for the sake of such experiences”. (Zuckerman, 1994 in Zuckerman & Kuhlman, 2000).</p> <p>Escape refers to breaking away / getting away from the usual environment of everyday life; being offered the opportunity to clear the mind from everyday thoughts/concerns.</p>
Family togetherness & Socialisation	<p>This category refers to affectionate closeness, communication, sharing of activities. In terms of socialisation visitors are given the opportunity to interact with other individuals/groups based on certain social norms (expectations, habits, values, motives, skills, beliefs) A process that familiarise people with, and makes them skilled at, the rules for living in society in an effective manner. (Elkin & Handel, 1978).</p>
Fast food outlets	<p>Businesses that offer low cost food with fast service of the entire meal. Their menu choice is normally limited with no scope for ‘tailored’ meals. There is no reservation system. Food items are manufactured off-site to offer high level of standardization. Outlets are often franchised or owned by large chains. The location is of utmost importance and they are mostly sited in city or town centres, on busy main roads. The food items are very affordable and served in disposable containers. Fast food outlets normally serve hamburgers, pizzas, ethnic foods, pasta, fried chicken, fish and chips, ice-cream, doughnuts, baked potatoes and sandwiches (Knowles, 1994:5; Johns, 1995:9).</p>
Food and Beverage	<p>Consist of restaurants, fast-food outlets and other catering markets. There is a combination of full service, eat on the premises, self-service outlets and take-aways (Knowles, 1994:5).</p>
Group tour	<p>A group tour makes use of the services of a professional tour manager. The tour is a structured programme of sightseeing, meals, transportation and accommodation. The tour consists of a group of people who travel together throughout the trip with a professional tour manager who is in charge of all arrangements</p>
Guest houses	<p>Guesthouses operate like small hotels with public areas for guests. It is bigger than Bed & Breakfasts and the owners do not stay in the house (Cooper, 2012:176).</p>



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Hospitality	The collective word used in the different sectors of the hotel and catering industry, a term also used to cover all products and services offered to the consumer away from home, including, travel, accommodation, food service, entertainment, recreation and gaming (Knowles, 1994).
Hotels	The largest of all accommodation types with a wide range of guest services. Hotels are often part of larger hotel groups that offer standardised experiences to guests. There are public areas such as lobbies, lounges, bars, verandas etc. There are normally on-site restaurants that are accessible to the public (SafariNow.com, 2012)
Local tour	A local tour is organised and operated in the local region. It could range from a half day general sightseeing tour to an overnight trip in the region.
Lodges	Designed to optimise the feeling of nature and offers outdoor experiences such as guided walks, game drives etc. The building style feature natural materials such as wood, stone and thatch (SafariNow.com, 2012).
Novelty & Innovation	“The quality of being new and fresh and interesting” and “a new or unusual experience or occurrence” (thefreedictionary.com). The process of making changes to something established by introducing something new (innovation) that adds value to customers (O’Sullivan & Dooley, 2009). Repackaging an existing attraction/event. “An original experience that is true to reality”. In tourism terms, a want to experience a different way of life; a manifestation of the identity of a people or a group of people (authenticity); the opposite of globalization and its resulting standardization; the discovery of places untouched by modernism; maintaining traditional methods and ways of life; travel with added value and quality of experience (Laliberté, 2005).
Private car	The private car is strictly not part of the commercial tourism industry; it nevertheless plays an important role in the tourism industry. When travelling by private car, tourists have complete freedom to travel as fast, far and to the places they wish to go. Once they have reached their destination, they also have transport at their disposal.
Public houses (pubs) and bars	Originally, public houses also known as pubs, primarily served alcoholic beverages mainly to male customers. Formerly food supply was very limited and there was an area for leisure activities such as darts, pool etc. Today’s themed pubs have a more social atmosphere and attract more females, families and affluent young people (Johns, 1995:11).
Quality environment	Site aesthetics (views, varied flora and fauna); built features (size, form, colour, materials); maintenance and upkeep (including eradication of vandalism and graffiti); cleanliness and waste management (including visible/sufficient dustbins) (Swarbrooke, 2002). Also includes the aspect of safety and security (emergency procedures; management of on-site traffic).



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Rail transport	Although rail transport still fulfils a major role in the intercity passenger market, its importance has shifted to urban and metropolitan passenger services. The main use of rail travel for tourism purposes is on the intercity services, where trains can compete effectively in terms of speed, comfort and cost with other transport modes
Rail transport (continued)	Sometimes scenic train trips are combined with other tourist activities such as visits to game reserves. Steam trains enthusiasts are also keen supporters of train trips making use of various types of steam locomotives.
Rental car	Rental cars are vehicles that are rented from a specific location where the car rental company is situated, for a specific period of time, at a pre-determined tariff which is generally based on time and mileage. Insurance and fuel is generally purchased separately.
Resorts	Accommodation in suburban or isolated rural areas with special recreational facilities. Focus on the pleasure seeking guest that are willing to pay higher rates for these facilities. Facilities and activities include: golf, swimming, spa treatments, horseback riding, hiking, fishing, tennis, diving, snorkelling etc. (Powers,1995:229).
Restaurants	It is establishments selling food for consumption on the premises only. Normally it provides a table with water/waitress services and sometimes offers take-away services. There are various types of restaurants that offer a variety of different food. This can include family-, upmarket- and themed restaurants. There is a higher level of customer expectation at restaurants (Johns, 1995:9).
Shebeens and Taverns	Shebeens are illicit bars or clubs that sell alcoholic beverages without a licence. They sell homebrewed alcohol like umqombothi, a traditional African beer made from maize and sorghum. They provide patrons a place to meet and express themselves culturally. During the apartheid's years black people were not allowed to enter licensed establishments and shebeens started in the townships. Shebeens evolved over time and some became taverns. Taverns are legalised establishments that sell food and liquor. Tavern buildings must be separate from residential dwellings and they may only sell liquor to adults between prescribed times (The Star, 2012).
Tourism Industry	Establishments whose principal productive activity is a tourism characteristic activity, i.e. the sum of all tourism characteristic activities (STATS SA), e.g. accommodation establishments, tour operators, travel agencies. In respect of GDP contribution, the tourism industry accounts for the DIRECT impact.
Transport	In the tourism industry, transport bridges the gap between origin and destination. Transport supplies the means by which tourists reach their destinations as well as the means of movement at their destinations. While the means of transport is sometimes the attraction such as a cruise or a trip on the Blue Train, transport mainly facilitates the movement of tourists. While transport may



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	not be the primary reason for travel, it remains an essential part of the total tourist product.
Visitor facilities & On-site variety	<p>All facilities required by visitors to fulfil basic needs, including sufficient ablution, information and on-site signposting, communication, parking, catering, parent-and-baby facilities. Something for all visitor types and tastes in all weather conditions. A diverse range of on-site attractions, including secondary on-site attractions such as shops, themed catering and entertainment (Swarbrooke, 2002).</p> <p>Facilities should be designed to be user-friendly (efficiency – in the right locations, ease of movement for disabled, helping visitors to orientate themselves) (Swarbrooke, 2002). Universal design of the facility implies design so that all the elements of the “built environment to be aesthetic and usable to the greatest extent possible by everyone, regardless of their age, ability, or status in life” (Center for Universal Design, 2010). Making provision for movement, information dissemination, participation in activities.</p> <p><i>[A disability may be physical, cognitive, mental, sensory, emotional, developmental or some combination of these].</i></p>



EXECUTIVE SUMMARY

Research on the five key domestic tourist market segments identified in the Domestic Tourism Strategy and SAT Domestic Campaign is comprehensive but there is a lack of research on the product offerings in terms of meeting the needs of these segments. The five segments are: Spontaneous Budget Explorers, New Horizon Families, Seasoned Leisure Seekers, High Life Enthusiasts and Well-to-do Mzansi Families.

The overall aim of the study was “to determine the particular experience needs of the five key domestic market segments that will inform more appropriate and specific product development, with specific reference to accommodation facilities, food and beverage services, attractions, transport services, events, packages and tours and activities/special interest offerings as key product categories.” The needs of each market segment were translated into criteria relating to product offerings within each sector against which product offerings could be measured for example, affordability, level of activity, intensity of social interaction, level of adventure, spontaneity, flexibility, capacity requirements etc. Geographic boundaries were set for the information to be gathered on product offerings. Four “tourism nodes” were selected in different provinces and information and data collection restricted to these nodes. These were the Central Karoo, West Coast, Bushbuckridge and OR Tambo regions.

A mixed methods approach using both quantitative and qualitative techniques was used to evaluate the product offerings within each tourism node against the needs criteria of each market segment. So, while it did not produce a comprehensive database of products per province it ensured that relevant data on each tourism node was collected. This resulted in the identification of gaps in the product offerings in terms of the market needs of each segment against which recommendations could be made for specific product development within that node. The data required to evaluate the product offerings in each node against market needs had to be obtained from individuals working in various capacities in the tourism industry. Judgement and snowball sampling was thus used to select potential respondents, with a total of 139 potential respondents being identified. A web-based self-administered questionnaire was developed consisting of both structured and open-ended questions. The focus of the questionnaire was to determine the gaps in the available product offerings in the identified tourism nodes with specific reference to accommodation



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facilities, food and beverage services; attractions, events and special interest offerings; transport services, packages and tours. The quantitative questions related mainly to the rating of the adequacy of available products to meet the needs of tourists visiting the region in general. The qualitative open-ended questions were designed to elicit more comprehensive information on shortcomings, problems, constraints and suggestions for improvement in specific areas.

A total of 50 responses were received (36% response rate), with varied frequency across the four nodes. Central Karoo elicited 18 responses, West Coast 22, Bushbuckridge 8 and OR Tambo District 4. Follow-up telephone and personal in-depth interviews were used to ascertain more in-depth information to support the data from the questionnaire where required (especially in the OR Tambo district). Secondary resources were accessed to support the primary data where needed. Data was analysed using frequency analysis providing a first indication of consensus or disagreement between respondents. Content analysis was used to analyse the primary and secondary data with the content of the comments made on the questionnaire and in the interviews being analysed according to each sector.

In analysing the results the study achieved its objective by positioning each market segment in terms of how the current product offerings in each sector in a tourism node would meet the needs of that market segment. This was done by expressing a relationship between the needs of each of the market segments and the tourist product offerings in each of the nodes as shown in Figure 1. The placement of a segment on the two scales was made according to a six-point scale where every point on the scale is represented by a tourism sector (e.g. transport) being found to have a positive outcome.

The results show that in each of the four nodes the ability of the current product offerings to meet the needs of the identified market segments differs. In the Central Karoo the ability of the product offerings to meet the needs of all five segments fall within the lower quadrants, ranging from very limited demand for the destination and limited appropriate supply for the High Life Enthusiasts (HLE) segment to a high demand but inadequate supply for the New Horizon Families (NHF) segment. In Bushbuckridge the results again range from limited demand from the High Life Enthusiasts for the destination with a slightly greater ability of



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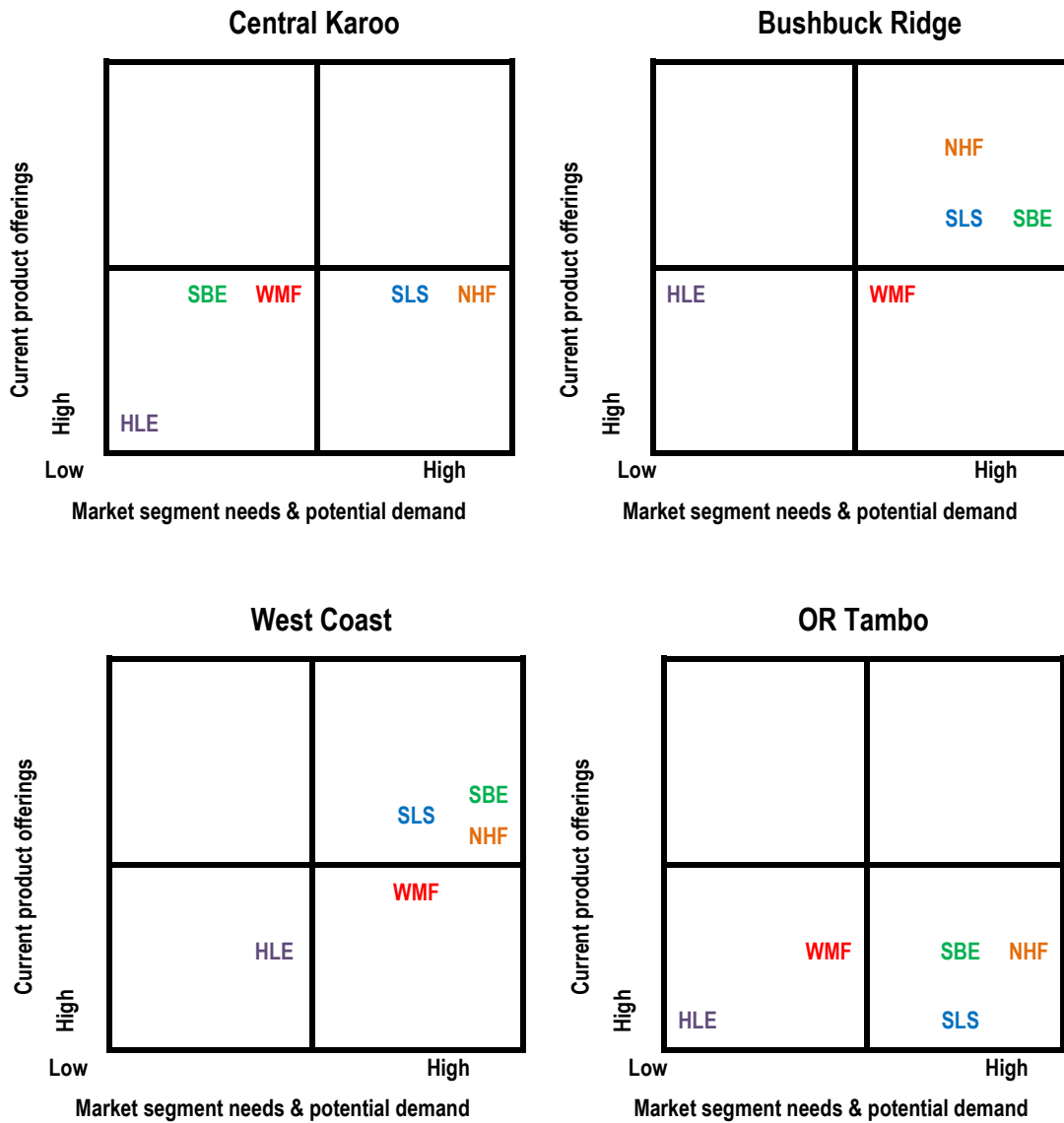
the destination to meet their needs if the development of products or stimulation of demand could occur. Bushbuckridge appears to have the most appropriate product offerings for the New Horizon Families while the demand for this destination seems to be highest from the Spontaneous Budget Explorers. The West Coast shows a distinct potential demand for the destination by four of the segments, namely Spontaneous Budget Explorers (SBE), New Horizon Families, Seasoned Leisure Seekers (SLS) and Well-to-do Mzansi Families (WMF) with the potential of the destination to meet their needs ranging from fairly low to fairly high. The OR Tambo district needs to be looked at more circumspectly given the lack of information on the district. Three of the segments, namely the New Horizon Families, Spontaneous Budget Explorers and the Seasoned Leisure Seekers show a distinct demand for the destination with the Well-to-do Mzansi Families appearing to have some demand and the High Life Enthusiasts very little. The product offerings in this region are currently underdeveloped or unknown by the markets so its' perceived ability to meet the needs of the market segments appears low. The position of each market in the tourism node had to be interpreted by looking at the findings in depth because the position of the market segment could be as a result of inadequate supply where the region has many gaps in its offering and has much to do to improve its product offering, or alternatively, the product offering may be adequate but the market is unaware of it. From the demand side the results had to be interpreted against the possibility that there is limited demand for the region or that there is an untapped demand because of the unawareness of what the destination has to offer.



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Figure 1: Current product offerings in terms of market segment needs and potential demand per node





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The purpose of positioning the market segments as a relationship between current offerings and demand was to provide a foundation for decision-makers to formulate appropriate responses to the gaps highlighted in the product offerings. Decision-makers need to decide whether the appropriate response to gaps in a particular market segment should be addressed through the improvement of the tourist offerings or through a greater focus on developing the demand, or both.

The value of the research lies in the development of a model which enables the matching of supply and demand based on specific market segments and regions. The research provides a foundation for further research. Product offerings of all sectors can be matched with the potential demand of the five market segments in other identified tourism nodes. Product offerings of one specific sector can be matched with the potential demand of the five market segments. There can be any permutation of matching all or one of the five market segments to potential demand in identified tourism nodes for all sectors or per sector.

Apart from time and resource constraints the research had certain limitations. The questionnaire was very long and, given the nature of the information required, quite complex which probably inhibited responses although through the efforts of the research team a relatively high response rate was obtained. The research could be done in more depth if one region was selected. Each region is complex and has unique characteristics which could not be adequately captured in this research. A focus group method could also be effectively applied to this research, perhaps with more information being gleaned on recommendations and strategies forthcoming. However, this requires much more time and resources to implement. Notwithstanding the limitations the research provided an effective tool for further studies of this nature.



SECTION 1: BACKGROUND AND CONTEXT OF THE STUDY

1.1. Introduction

In collaboration with the National Department of Tourism an approach/methodology to providing an analysis of the supply of tourism products for the five key domestic market segments as identified and comprehensively described in SA Tourism's Domestic Segmentation document of 2010, was undertaken.

The 5 key market segments are:

- Spontaneous Budget Explorers
- New Horizon Families
- High Life Enthusiasts
- Seasoned Leisure Seekers
- Well-to-do Mzansi Families

1.2 Rationale for the study

The National Department of Tourism has recognized domestic tourism as one of the key contributors to the economy (DEAT, 2004; Rogerson & Lisa, 2005:89). Until recently, government planners and policy makers of developing countries have focussed more on international tourism and ignored the potential benefits from the emerging domestic tourist market (Scheyvens, 2002:143; Rogerson & Lisa, 2005:88). Thomas (2005:38) specifically mentions the neglecting of domestic tourism research across Africa. Successful tourist destinations have very strong domestic tourism markets of roughly 70% and an international tourism market of 30%. South Africa differs significantly as we have a 40% domestic tourism market and a 60% international tourism market (DEAT, 2008:54). However, domestic tourism activities in South Africa are more difficult to track compared to international travel as cross border travel visitors have been included in the statistics (Keyser, 2002; Rogerson & Lisa, 2005).

In 2001, the World Tourism Organisation (WTO) predicted that developing countries, particularly China, India, Brazil, Thailand and Mexico will have strong development in their domestic tourism sector in the next 20 years (Rogerson & Lisa, 2005:88). China's domestic travel dominates their international tourism industry with the 784 million domestic tourists



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contributing US\$ 43.6 billion to their economy (Wang & Qu, 2004). Various studies have been done on China as a tourism destination since the significant growth of the tourism industry (Gormsen, 1996; Qiao, 1996; Zhang, 1997; Cai & Knutson, 1998; Wang & Qu, 2004; Wu, Zhu & Xu, 2000). These studies reveal that domestic tourism promotes local economic growth, develops economic structures, stimulates employment and encourages domestic demand (Wu, Zhu & Xu, 2000:296). There are similarities between South-Africa and China's tourism development. Similar to China South-Africa is a large country with different regions each with unique economic configurations (Gauteng vs Northern Cape). There is also a substantial gap between the various income groups (Wu, Zhu & Xu, 2000:296).

The growth of domestic tourism could be stimulated by a growth in citizens' income; an increase of leisure time; structural adjustment of the national economy; and the involvement of the local government in policy making (Wang & Qu, 2004). Furthermore, the development of domestic tourism can be greatly encouraged by the involvement of government. In countries like China, tourism policies changed from controlling, to non-intervention and then to positive encouragement (Wu, Zhu & Xu, 2000:298).

Increase sustained domestic tourism supports the development of tourism services and products. Tourism supply must align with tourism demand, meeting the needs of market segments.

Tourist satisfaction depends on the ability of the supplier to satisfy customer needs at the right time with the right products, in other words, to match the supply and demand factors. Therefore, product development plays a critical role. Effective product development can speed up time to market, improve the quality of products, reduce production costs, and smooth out demand variation. Product development is a complex process that requires joint efforts from different players within the leisure industry. It requires a good understanding of customer needs, and involves a careful analysis of product components and elements to identify potential products that will suit continuously changing consumer tastes. Although product development is the focus of numerous manufacturing industry studies, it is a relatively neglected area of research within the tourism context (Zhang, Song & Huang, 2009). This lack of attention may be due to the composite nature of tourism products



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(Smith, 1994). Discussion of tourism product formulations began with Medlik and Middleton in the seventies (1973). However, with very few exceptions, notably the studies of Agarwal, Ball, Shaw, and Williams (2000), Bramwell (1998), and Smith (1994), there has been very little analysis of tourism product development, in contrast to the significant research efforts directed toward tourism marketing. In tourism, as in all service industries, satisfying customer needs with the appropriate products is of utmost importance. If tourists are satisfied with a travel product, they will purchase the product again, and there is a better chance that they will recommend it to others (see, for example, Kozak, 2001; Tian-Cole & Crompton, 2003). Hence, the issue of tourism product development is worth further investigation.

1.3. Problem statement

In order to improve domestic tourism contribution towards the economy of the country, the National Department of Tourism recently launched a Domestic Tourism Growth Strategy (DTGS) in conjunction with South African Tourism's new Domestic Tourism marketing campaign. The aim of these initiatives is to lead a new approach in the sustained development and growth of domestic tourism and its contribution to the South African tourism economy.

The Domestic Tourism Growth Strategy highlights a number of key factors that are necessary to develop a successful domestic tourism market in South Africa. One of the key factors identified is product diversification. Research shows that a tourism product includes a combination of components such as physical goods, services experiences, events, persons, places, properties, organisations, information and ideas. Tourism products, whether tangible or intangible can be based on a variety of resources (e.g. natural, cultural, historical, religious, special interest, etc.). For the purposes of this research study specific tourism product categories include accommodation facilities, food and beverage services, attractions, transport services, events, packages and tours and activities/special interest offerings.

Even though tourism products or attractions can have universal appeal, markets segments can be identified with specific product needs. South African Tourism's (SAT) new domestic marketing campaign under the tagline "whatever you are looking for, it's right here in South



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Africa”, identifies five key domestic market segments and their travel behaviour and preferences” (NDT Terms of Reference for the Project 2012).

While the research on the five key domestic market segments is comprehensive there is a lack of research on the product offering in terms of meeting the needs of the different market segments identified in the Domestic Tourism Strategy and SAT Domestic Campaign. The purpose of this research project is to take the first step towards closing this gap.

1.4 The purpose of the study

The overall aim of the study is “to determine the particular experience needs of the five key domestic market segments that will inform more appropriate and specific product development, with specific reference to accommodation facilities, food and beverage services, attractions, transport services, events, packages and tours and activities/special interest offerings as key product categories.”

In interpreting the overall aim for this particular study, the purpose is understood to be the evaluation of current product offerings within the various categories against the needs of the five domestic market segments; and with the identification of any gaps to make recommendations for more effective product development.

1.5 The objectives of the study

The objectives of the study taken from the Terms of Reference are to:

- “Determine the product needs (particularly in terms of accommodation facilities, food and beverage services, attractions, transport services, events, packages and tours and activities/special interest offerings) of the different market segments identified in the Domestic Tourism Strategy and SAT Domestic Campaign;
- Review the currently available tourism product offerings (with particular reference to accommodation facilities, food and beverage services, attractions, transport services,



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events packages and tours and activities/special interest offerings) in terms of their appropriateness to meet the particular needs of each identified domestic market; and

- Provide recommendations for specific product development that need to be promoted and supported to meet the needs of each of the identified domestic market segments.”

These objectives will be viewed from the perspective of each category of product offering. For the purposes of brevity, in this report, reference will be made to three categories under the following headings:

- Accommodation as well as food and beverage (this category refers to various types of accommodation establishments)
- Attractions and events (this category also includes activities and special interest offerings)
- Transportation and packages (this category refers to various transportation modes and tours)



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SECTION 2: THEORETICAL BACKGROUND AND LITERATURE REVIEW

Two decades ago, Inskeep (1991) suggested that in order to understand the supply of tourism within a region (provinces) it is necessary to look at regional access and the internal transportation network of facilities and services; the needs of tourist attractions and their locations; location of tourism development areas including resort areas; as well as the quality and quantity of tourist facilities and services (Inskeep, 1991).

This literature survey is further structured under the three product categories.



Transportation and Packages

Transportation

Individual transport operators need to have a clear understanding of the existing and likely patterns of demand for tourist transport, to ensure that they are able to meet the requirements of tourists. High quality market intelligence and statistical information are vital in the strategic planning process and day-to-day management of transport, so that the services offered are responsive and carefully targeted at demand (Page, 1999). According to Page (1999) the types of information required by transport decision makers associated with tourist transport provision are usually gathered through the marketing research process and are likely to include the following:

- The geographical origin and spatial distribution of demand in the generating region
- The demographic and socioeconomic characteristics of tourist travel demand (e.g. age, sex, family status, social class, income and expenditure)
- The geographical preferences, consumer behaviour and images of tourists for holiday destinations and tourist travel habits, including the duration of visit
- When it is likely to occur (e.g. temporal and seasonal distributions of use)
- Who is likely to organise the holiday (e.g. independently or as part of a package)
- The choice of transport likely to be used in the tourist transport system
- Future patterns of demand (e.g. short haul and long-term forecasts of tourist travel)
- Government policy towards tourist transport operations
- The implications of tourist travel demand for infrastructure provision and investment in tourist modes of transport

To gather this information, Page (1999) suggests three common types of tourism surveys:

- Pre-travel studies of tourists' intended travel habits **and likely use of tourist transport**
- Studies of tourists in transit or at their destination, to provide information on their actual behaviour and plans for the remainder of their holiday or journey
- Post travel studies of tourists once they have returned to their place of residence

This study focuses on tourists' likely use of transport. To meet the demand for tourist transport, businesses and operators can employ a range of concepts to analyse what they



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need to do to match supply to demand. According to Sinclair and Stabler (1997:83) in any analysis of transport supply issues, a range of criteria need to be investigated in different market conditions. These are:

- The number and size of firms
- The extent of market concentration
- Entry and exit barriers
- Economies/diseconomies of scale and economics of scope
- Costs of capital, fixed capital and costs of operation
- Price discrimination and product differentiation
- Pricing policies (e.g. price leadership, price wars and market share strategies)

Much of the existing knowledge available on these issues has been generated through interviews with managers in each sector of the transport industry about their commercial practices. It is rare to find researchers being given access to commercial information on supply (and demand) issues, due to the confidential and sensitive nature of the data (Page, 1999). This study provides a broad view of transport modes in particular regions and is not an in-depth analysis of transport supply.

Tour Packages

Tour wholesalers create many different kinds of tours. Some are very basic and consist only of transport to the destination and accommodation, and allow travellers flexible departure dates. At the other extreme are multi-destination tours that include all food, entertainment, sightseeing, escorts and gratuities, in addition to accommodation and transport. Over the years there has been an increase in the number of firms offering special-interest tours, and that number is expected to grow substantially. The most popular special-interest tours are outdoor adventures. The growing interest in eco-tourism suggests that demand for these tours will increase in the future. Other types of special-interest tours are historic and archaeological tours, art lovers' tours, honeymoon packages, photography and gourmet tours. Some tour wholesalers now allow tourists to customise their packages, either by designing shorter tours and allowing travellers to combine them together in various ways, or by printing brochures of selected suppliers and allowing tourists to combine the components (Lubbe, 2000). These are sometimes referred to as "freelance itineraries" or "independent tour packages" (Mancini 1996). More operators are offering



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consumers flexibility when choosing a package and independent packages are becoming increasingly popular.

Attractions and events

The attractions and events sector forms the core motivator of the tourism industry, enticing a visitor to visit a destination. Attractions as a sector are complex to describe since they include a vast range of features. In this study, the focus will fall on attractions purposefully built or identified as natural attractions that attract tourists, as well as on events, activities and special interest offerings.

Attractions and events are generally targeted at various market segments according to age, gender, stage in the family lifecycle, social class, place of residence, visitor type (day or stay-over), group size (individual or groups), seasonality of visitation (season, month, day of the week and time of day), as well as the personality of visitors (lifestyles). Another recent and more appropriate form of targeting market segments focus on the benefits that these visitors seek that may include aspects such as status, nostalgia, education, value for money, service levels, variety, accessibility, additional facilities, excitement, and so on (Swarbrooke, 2003). Getz (2009) suggests that the focus should be on who travels for events and why; who attends events while traveling; as well as what 'event tourists' do and spend.

The "attractions product" should be viewed as a 'bundle of benefits' being offered to a visitor (Swarbrooke, 2003) and as such a number of elements have to be considered:

- The visitors have to be given the opportunity to "co-create" their own experience.
- The visitor desires an authentic experience (personalization, customization).
- A range of intangible elements affect the experience (sense of place)
- There are three levels of a service offering (core, tangible, augmented) as presented by Kotler (1994).

Available attractions, events, activities and special interest offerings could be evaluated according to these criteria.

Getz (2005) suggests that the available offering of the "events product" may be determined according to the so-called event portfolio on offer. The aim is to determine how demand is currently being satisfied through a range of events that differ in scale and frequency. In the



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context of domestic tourism, local and regional events must take the seasonal and geographic spread of tourism numbers into account. Getz says that existing studies on events within a tourism context “has now grown beyond anyone’s capability of reading it all” (Getz, 2009:410).

A number of studies have addressed the issue of matching supply with demand for the four categories under investigation (events, attractions, activities and special interest offerings).

- Behaviour of sports tourists participating in outdoor and adventurous activities is the second most researched area in sports tourism (Weed, 2006 in Weed, 2009:621) and several studies exist that explore the nature of demand (motivation, behaviour and sport event experiences).
- Cultural celebrations, including festivals, carnivals, religious events, the arts and entertainment in general (mainly concerts and theatrical productions) are often studied under cultural tourism and have been covered in a substantial number of papers (Getz, 2009). Marais (2009) for example looked at the different success factors influencing the experience of visitors to a wine festival and how this relates to management practices. Williams and Saayman (2012) examined the relationship between travel motivators and the key success factors of visitors to the Cape Town International Jazz Festival.

Such studies provide insight into the motivations of tourists attending events and provide some insight into how the adequacy of the current offerings within the attractions, events, activities and special interest offerings sectors could be evaluated.

Accommodation, food and beverage

Cooper (2010:139) states that the hospitality sector plays a very important role in all tourism systems and Clancy (2011:81) states that accommodation globally represents the greatest share of the overall tourism expenditure. Hospitality, and specifically accommodation, are key elements in the tourism industry because they form the travel base when tourists explore destinations (Hall & Page, 2006:108). The World Bank (2012) acknowledges the importance of accommodation facilities and the contribution thereof for



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destination competitiveness. According to Ernst and Young (2010) South Africa's hotel and accommodation industry is not on par with international standards and the upgrade of facilities is essential. At the same time research on South Africa's current hospitality industry inadequate, especially viewed against the changes in the domestic markets (Timothy & Teye, 2009; Thomas, 2005:38; Keyser, 2002).

South Africa's re-entry into the global tourism economy brought many changes in the hospitality sector from 1990 to 2010. During the Apartheid years black people were prohibited from hospitality establishments such as hotels, resorts, guesthouses and restaurants. As a result domestic tourism among black people was very restricted. After the fall of the Apartheid-era in 1994, a strong growth in black tourists occurred, especially as a new black middle class emerged with political and economic freedom which led to the expansion of South Africa's domestic hospitality sector (Rwigema, 1996:647).

The accommodation sector has a highly segmented character (Timothy & Teye, 2009). Timothy and Teye (2009) highlight the supply of different accommodation forms as a result of shifting markets, new trends and changing accommodation products. The focus of the hospitality section in this study will be on the post-apartheid transition of the hospitality sector and how the supply of South Africa's accommodation establishments fulfil the needs of the five newly identified market segments.



SECTION 3: RESEARCH METHODOLOGY

3.1 Approach to the study

The research team evaluated the product offerings against the identified needs of each market segment. The needs of each market segment were translated into criteria relating to product offerings within each sector, for example, affordability, level of activity, intensity of social interaction, level of adventure, spontaneity, flexibility, risk aversion, capacity requirements *et cetera*. **Appendix 1** provides an example of the criteria derived for assessing attractions¹: generic criteria across sectors as well as criteria unique to a sector were included.

As a first checkpoint in the study the criteria were formulated in an interim document to ensure agreement between the research team and the NDT. Due to the time and capacity constraints of the project it was necessary to restrict the number of criteria against which the product offerings are viewed.

Certain boundaries were set for the information to be gathered on product offerings. Four “tourism nodes” were selected in different provinces and information and data collection restricted to these nodes (see **Appendix 2** for the Maps and Motivation of selected nodes). These were the Central Karoo, West Coast, Bushbuckridge and OR Tambo regions. This provided for a more intensive investigation into areas that currently have a greater need for information or that have been identified as potential growth points by Tourism authorities.

3.2 Research method

A mixed methods approach using both quantitative and qualitative techniques was used to evaluate the product offerings within each tourism node against the needs criteria of each market segment. So, while it did not produce a comprehensive database of products per province it ensured that relevant data on each tourism node was collected. This resulted in

¹ Criteria were developed for each sector, namely attractions, events, transport, tours and accommodation.



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the identification of gaps in the product offerings in terms of the market needs of each segment against which recommendations could be made for specific product development within that node.

3.3 Target population and context

The data required to evaluate the product offerings in each node against market needs had to be obtained from individuals working in various capacities in the tourism industry. The sample selected for each node consisted of tourism professionals from provincial, regional and local tourism associations; industry-based associations (e.g. SATSA), sector-based associations within the regions (e.g. the Bed- and Breakfast Association) as well as referrals from those approached to respond to questions (specifically identified tourism professionals who have the required level of knowledge to enable participation in the project).

Judgemental and snowball sampling was used to select potential respondents with a total of 139 (potential) respondents being identified. The respondents had to fulfil certain criteria such as a minimum level of involvement in the local tourism industry, number of years involved in tourism and a level of expertise on the region. The total list of potential respondents is attached as **Appendix 3**.

3.4 Measuring instruments

A web-based self-administered questionnaire was developed consisting of both structured and open-ended questions. The “Qualtrics” survey instrument was used to structure the questionnaire to provide for electronic responses. Provision was made for paper-based questionnaires as well (**Appendix 4** provides a copy of the questionnaire). The focus of the questionnaire was to determine the gaps in the available product offerings in the identified tourism nodes with specific reference to accommodation facilities, food and beverage services, attractions, events and activities/special interest offerings; transport services, packages and tours. The questionnaire included a cover letter and brief description of the five market segments. The questions were designed to elicit both quantitative and qualitative data:



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- The quantitative questions related mainly to the rating of the adequacy of available products to meet the needs of tourists visiting the region in general.
- The qualitative open-ended questions were designed to elicit more comprehensive information on shortcomings, problems, constraints and suggestions for improvement in specific areas. Respondents were able to respond to the open-ended questions via both the web and paper-based questionnaire. A second phase of data collection was undertaken via a primary data collection process from a respondent. Follow-up telephone interviews which were used to ascertain more in-depth information where required or to clarify responses (**Appendix 5** provides an example of the telephone interview).

3.5 Ethical considerations

3.5.1 Voluntary participation

Participation in this research study was voluntary and participants had to give consent to participate. Respondents were able to choose not to participate and could withdraw their consent to participate at any time. There would be no repercussions should they decide to withdraw from this study (refer to cover letter in **Appendix 4**).

3.5.2 Protection of confidentiality

While respondents were requested to provide their details (name, position, organisation etc.) they were assured of confidentiality of responses in the introductory letter (refer to **Appendix 4**).

3.5.3 Ethical clearance

Ethical clearance for the project was obtained from the Research Ethics Committee of the Faculty of Economic and Management Sciences at the University of Pretoria (**Appendix 6**).



SECTION 4: PILOT STUDY

The development of the questionnaire went through a number of rounds. The research team involved with each sector initially developed the questions relating to their specific sector. The questionnaire was then extended to questions on the profile of tourists to the region and generic questions relating to all sectors.

A pre-test of seven questionnaires was done with well-established tourism professionals with a number of constructive adjustments made to the questionnaire where suggested. The following individuals were approached for pre-testing:

Ms Leane Grobbelaar – Tshwane University of Technology

Ms Adri Smit – Tourism Murraysburg

Mr Antonie Wildenboer – Reservation House

Ms Tania Steyn – Franschoek Wine Valley

Mr Wouter Koekemoer - Tshwane Tourism

Mr Sugan Pillay – SA Tourism

Mr Franco Jordaan - GM Court Classique Hotel Pretoria



SECTION 5: DATA ANALYSIS

5.1 Quantitative Data

Frequencies were captured through the “Qualtrics” instrument. The comments were also captured on the system, which provided a first indication of consensus or disagreement between respondents.

5.2 Qualitative Data

Content analysis was used to analyse the primary and secondary resources as it is an objective and systematic research technique that can successfully measure semantic content. Content analysis extends far beyond simple word counts. Data is coded and categorized providing for rich and meaningful data.

The content of the comments made on the questionnaire was analysed according to each sector. The following steps were followed:

- i. The comments were viewed against the objective of the question to assess the meaning.
- ii. Comments were linked to relevant criteria identified in the matrices developed for each sector in accordance with identified market segment needs.
- iii. The comments made on one sector were viewed against the results and any comments made on the same topic in another sector.
- iv. Where applicable comments were viewed in the context of the respondent’s profile i.e. the town in which he/she is located or the position he/she holds.
- v. An overall assessment was made in terms of respondents’ opinions on the product offerings in a particular sector.
- vi. Interviews were evaluated for related comments on the sector which validated or contradicted the responses on the questionnaire. Some of the interviews went far wider than the context of the questionnaire and all information was not directly pertinent to the objectives of the study(**Appendix 5** provides an example on an interview conducted).



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5.3 Secondary Data

Where the information on product offerings in a node or sector was regarded to be inadequate specific secondary sources on the affected areas were sourced and studied in order to provide more comprehensive and detailed information on the gaps and the possible recommendations.



SECTION 6: RESEARCH FINDINGS

6.1 The relationship between segments and product offerings per node

The overall aim of the study was to do an analysis of the supply of tourism products for the five key domestic market segments. The research objective was to review the currently available tourism product offerings (with particular reference to accommodation facilities, food and beverage services, attractions, activities, transport services, events packages and tours and activities/special interest offerings) in terms of their appropriateness to meet the particular needs of each identified domestic market segment.

The study achieved this objective by positioning each market segment in terms of how the current product offerings in a specific tourism region (node) meet the needs of the market segment. This was done by expressing a relationship between the needs of each of the market segments and the tourist product offerings in each of the nodes. These relationships are shown in Figure 1 followed by the conclusions drawn from these results. The purpose of expressing these relationships is to provide a foundation for decision-makers to formulate appropriate responses to the gaps highlighted in the product offerings. Decision-makers need to decide whether the appropriate response to gaps in a particular market segment should be addressed through the improvement of the tourist offerings or through a greater focus on developing the demand, or both.

The six sector-specific product offerings² are:

	Transport
	Package tours
	Local tours
	Accommodation
	Attractions (natural and man-made)
	Events and activities/special interest offerings

² Data obtained on food and beverage establishments proved inadequate for analysis and did not provide reliable results for inclusion in the study



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The sectors were viewed against the needs of each of the market segments as identified in the SA Tourism 2010 Market Segmentation document (SA Tourism, 2011) shown as follows:

SBE	Spontaneous Budget Explorers
NHF	New Horizon Families
HLE	High Life Enthusiasts
SLS	Seasoned Leisure Seekers
WMF	Well-to-do Mzansi Families

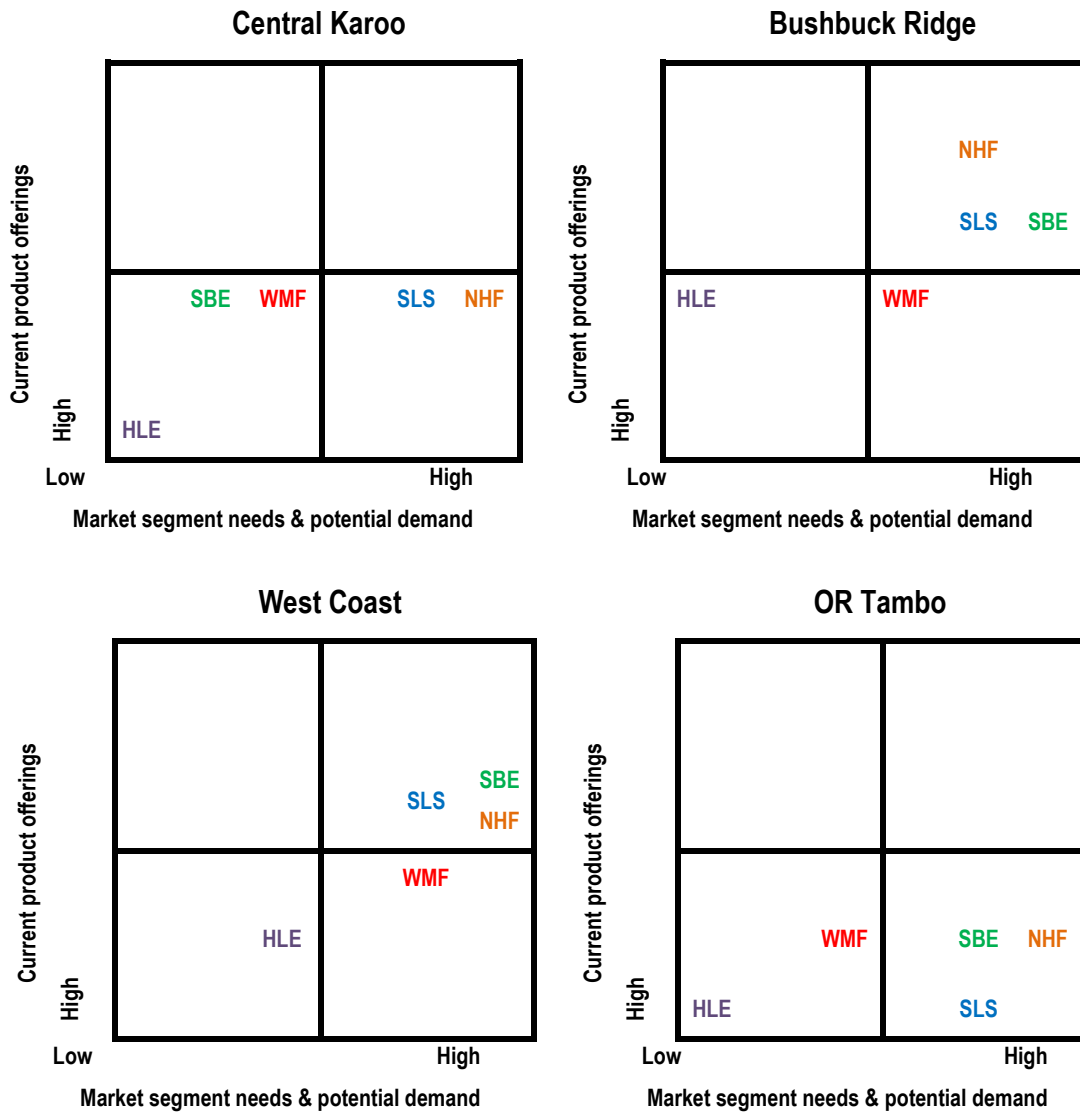
Each market segment was plotted based on the rating given to each sector in terms of the current product offering (supply) and needs of the market (demand) within each node (e.g. ✓ ✕) as depicted in Figure 1. The plotting area was divided into four quadrants showing the current offerings (supply) on the vertical axis and market needs (demand) on the horizontal axis. The placement of a segment on the two axes was made according to a six-point scale where every point on the scale is represented by a tourism sector (e.g. transport) being found to have a positive outcome and represented by a tick. The coding and plotting procedure is explained in the next section.



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Figure 1: Current product offerings in terms of market segment needs and potential demand per node





6.2 Conclusions on the relationship between demand (market needs) and supply (current product offerings) in each node

CENTRAL KAROO

CENTRAL KAROO SBE POSITION

SBEs fall within the low demand/low supply quadrant with supply at the higher end of the quadrant.

While current product offerings are adequate, there appears to be an untapped demand. This may be because there seems to be a demand for package tours to the region, although supply is limited and suitable accommodation for the market is also limited. There is adequate supply and demand for attractions and events.

CENTRAL KAROO NHF POSITION

NHFs fall within the low supply/high demand quadrant with supply at the higher end of the quadrant.

There is clear demand from this market segment to visit the region but certain challenges in relation to supply of current offerings. The major gaps appear to be the provision of suitable packages to the region and local tours offered within the region. There is also a need for child-friendly events.

CENTRAL KAROO HLE POSITION

HLEs fall within the low supply/low demand quadrant with current supply being mostly unsuitable for this market.

The only product offering that may appeal to this market are the desired “must see” attractions, although these are not well managed with limited customer service, which is very important to this market.

CENTRAL KAROO SLS POSITION

SLSs fall within the low supply/high demand quadrant with current supply at the higher end of the quadrant.



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There is a distinct demand by this market to visit the region. Transport to the destination, attractions and events offer what this market may need while accommodation and local tours are inadequate in terms of suitable supply.

CENTRAL KAROO WMF POSITION

WMFs fall within the low supply/low demand quadrant with both at the higher end of the quadrant. Transport, attractions and events seems to be suitable and adequate for this market while there are gaps in the accommodation, packages and local tours sectors. As far as the accommodation is concerned, there are no high-end establishments for this market. This is not a market for group tours to the region as they generally prefer to travel in private vehicles. There appears to be an untapped demand for the wide range of lifestyle events in the region.

BUSHBUCKRIDGE

BUSHBUCKRIDGE SBE POSITION

SBEs fall within the high demand/high supply quadrant with supply at the lower end of the quadrant.

There is a clear demand from this market segment to visit the region. There are some gaps in the current product offerings in terms of package tours to the region (there are not enough and they are not well-promoted). The variety of events is limited with a focus on sport while this market also requires lifestyle and cultural events.

BUSHBUCKRIDGE NHF POSITION

NHFs fall within the high supply/high demand quadrant.

There is a demand from this market segment to visit the region and supply of product offerings seem to be adequate except for package tours to the region that are limited. There are sufficient events and activities available for this market if better promoted and repackaged for the family market.

BUSHBUCKRIDGE HLE POSITION

HLEs fall within the low supply/low demand quadrant with current supply at the higher end of the quadrant.



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There is practically no demand for this region in terms of the needs of this market. While transport is adequate, the market does not desire it. This is not a market for package or local tours. Accommodation meets the needs of this market. The attractions do not offer unique and sophisticated experiences while sport and lifestyle (weddings) events are suitable for a potentially untapped market that seeks to boost their status.

BUSHBUCKRIDGESLS POSITION

SLs fall within the high supply/high demand quadrant with current supply at the lower end of the quadrant.

There is a distinct demand by this market to visit the region. This segment is not group tour enthusiasts and events should be developed in terms of cultural and arts festivals as well as special interest activities (e.g. birding).

BUSHBUCKRIDGE WMF POSITION

WMFs fall within the low supply/high demand quadrant with supply at the higher end and demand at the lower end of the quadrant.

This is not a market for group tours to the region as they generally prefer to travel in private vehicles. Man-made attractions do not offer comfort and relaxation. There is also no provision for family-friendly edutainment. There are no satisfactory events or activities for this market that focus on comfort and child-friendly facilities.

WEST COAST

WEST COAST SBE POSITION

SBEs fall within the high demand/high supply quadrant with supply at the lower end of the quadrant.

There is a clear demand from this market segment to visit the region. There are some gaps in the current product offerings in terms of package tours to the region (there are not enough and accommodation does not cater for large groups, which affects socialisation). There is a variety of events, but they do not address this market's desire for shopping and nightlife.



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WEST COAST **NHF** POSITION

NHFs fall within the high supply/high demand quadrant with supply at the lower end of the quadrant.

There is a clear demand from this market segment to visit the region and supply of product offerings seem to be adequate except for package tours to the region that are limited.

Attractions offer limited educational and interactive aspects for the needs of accompanying children, while events (such as the wine route and crayfish festival) largely focus on the adult market.

WEST COAST **HLE** POSITION

HLEs fall within the low supply/low demand quadrant with demand at the higher end of the quadrant.

As far as supply is concerned, only events appear to be adequate for enhancing this market's need for social status and glamour. While a variety of local tours do exist, many of the local activities may not be perceived as glamorous. There are limited higher-end accommodation establishments with good quality products (e.g. Bushman's Lodge).

WEST COAST **SLS** POSITION

SLSs fall within the high supply/ high demand quadrant with supply at the lower end of the quadrant.

There is a distinct demand by this market to visit the region. This segment is not group tour enthusiasts. Attractions appear to be lacking in terms of authenticity and nostalgic experiences which this market desires.

WEST COAST **WMF** POSITION

WMFs fall within the low supply/high demand quadrant with supply at the higher end of the quadrant.

This is not a market for group tours to the region as they generally prefer to travel in private vehicles. There are limited higher-end accommodation establishments with good quality products (e.g. 4 and 5 star hotels). Many events and activities exist in this region although none that specifically address the edutainment aspect desired by adults for their children in this market.



OR TAMBO DISTRICT

OR TAMBO DISTRICT SBE POSITION

SBEs fall within the high demand/low supply quadrant.

While there are enough accommodation establishments to fulfil the needs of this market, the market may be unaware of them. Transport to the destination, as well as within the destination, does not meet the requirements of this market. Road conditions may be problematic as it was indicated that visitors often need 4x4 vehicles to access products. There is an inadequate supply of packaged tours to the destination. There are not enough events (especially festivals) or coordinated special interest activities available.

OR TAMBO DISTRICT NHF POSITION

NHFs fall within the low supply/high demand quadrant with demand at the higher end of the quadrant.

There is a clear demand from this market segment to visit the region, but with gaps in the supply. There is an inadequate supply of packaged tours to and within the destination. The natural attractions are not accessible or child-friendly, which is important for this market. There are no cultural events or special interest activities available especially for children.

OR TAMBO DISTRICT HLE POSITION

HLEs fall within the low supply/low demand quadrant with both at the lowest end of the quadrant.

The OR Tambo District does not currently offer what this market desires in terms of status, exclusivity and quality across all the sectors.

OR TAMBO DISTRICT SLS POSITION

SLSs fall within the low supply/high demand quadrant with supply at the lowest end of the quadrant.

There is a demand by this market to visit the region. There are gaps in all the sectors in to meet the needs of this market.



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OR TAMBO DISTRICT WMF POSITION

WMFs fall within the low supply/low demand quadrant with demand at the higher end of the quadrant.

There are no flights to this region except to Mthatha which requires car rental links. This is not a market for group tours to the region as they generally prefer to travel in private vehicles or by air. There is a demand for local tours but there is a lack of awareness. There are a number of suitable high-quality establishments, but many of these establishments are not star-graded, creating a negative perception. The current natural attractions are not well-managed and do not provide experiences desired by this market (e.g. educating children in terms of heritage). There also appears to be a lack of well-managed events in terms of provision for children.

6.3 Rating each market segment per node

The potential demand of each market segment (based on the needs of the market segment) was rated against the current supply of product offerings in each sector and node as depicted in Figure 2 using the following codes:

Current supply meets potential demand	✓✓
Current supply inadequate for potential demand	×✓
Limited supply and limited potential demand	××
Current supply and untapped potential demand	✓×

The matrix in Figure 2 (below) provides the ratings given to each market segment in each node.

The columns show the various sectors under each node in relation to a specific market segment and the rows show a specific sector in terms of all the nodes in relation to a specific market segment. Based on the quantitative and qualitative analysis a code (either a tick ✓ or a cross ×) was allocated to the sector.

The first code refers to the supply of the current product offerings and the second code refers to the demand of the market segment in terms of their needs for that specific product offering.

A tick (✓) on the supply side means that the supply is adequate to meet the needs of the market segment. A cross (×) means that the supply does not meet the needs of the market



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either because there may not be such an offering or that the offering has gaps which need to be overcome.

A tick (✓) on the demand side means that there is a recognised demand for the product. A cross (✕) means that there is either little demand for the product based on the needs of the market segment, or that there may be an untapped market potential.

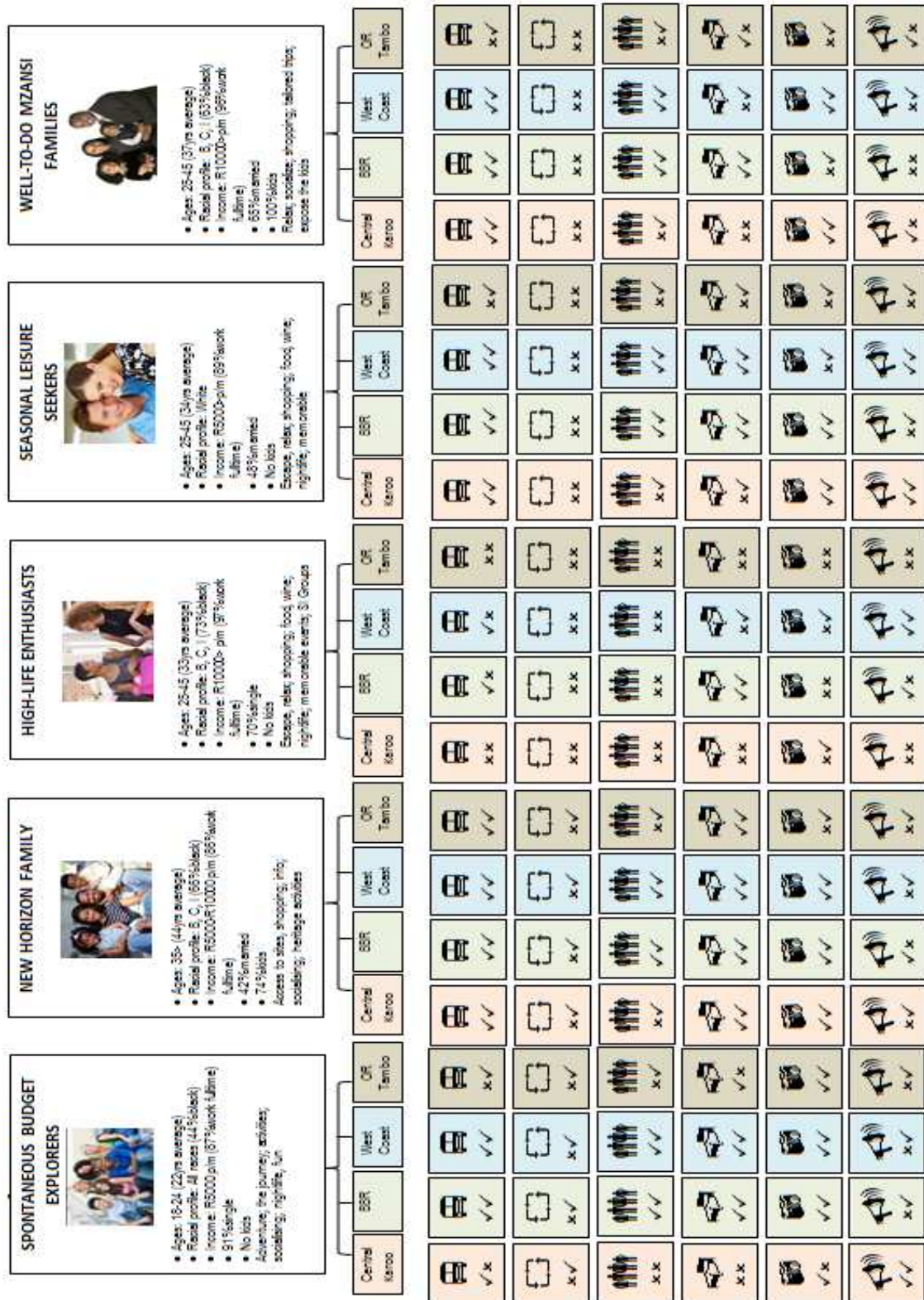
The codes indicated on the matrix depicted in Figure 2 are derived from the analysis of the findings as described in section 6.3.



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Figure 2: Market segment ratings per sector per node





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6.4 Description of findings per node

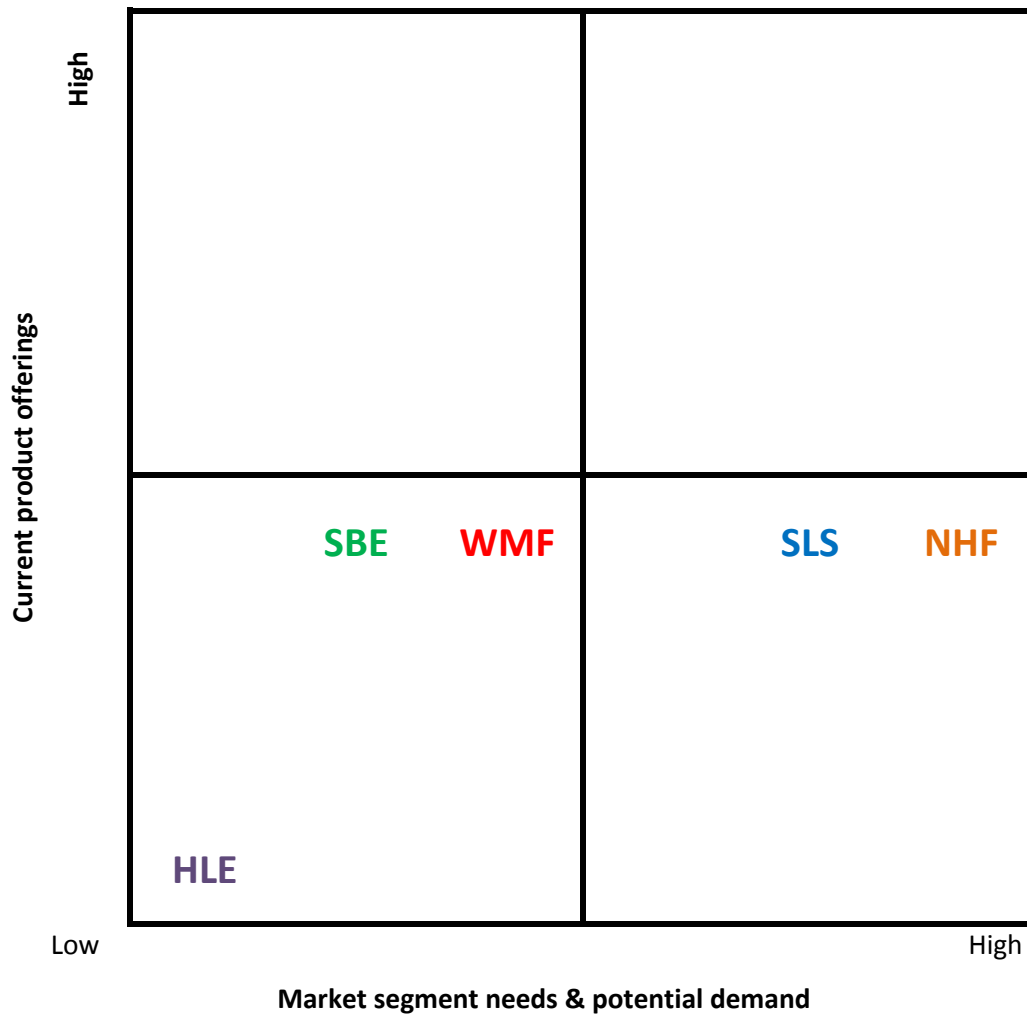
The description of the findings per node presented in each of the following sections is organised as follows:

- The graphic depiction of the position of each market in terms of its product offerings and potential demand within the tourism node.
- A discussion on the general profile of the tourists that visit the region.
- A general description of the sector in the region.
- A discussion on the suitability of the region in terms of the five domestic target market segments
- A discussion on the gaps in the sector's product offerings
- A discussion on information availability to potential and/or current tourists in the area
- Recommendations per sector per region



6.4.1 CENTRAL KAROO

Current product offerings in terms of market segment needs and potential demand





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GENERAL PROFILE OF TOURISTS TO THE CENTRAL KAROO

Figure 3: Group size: Central Karoo

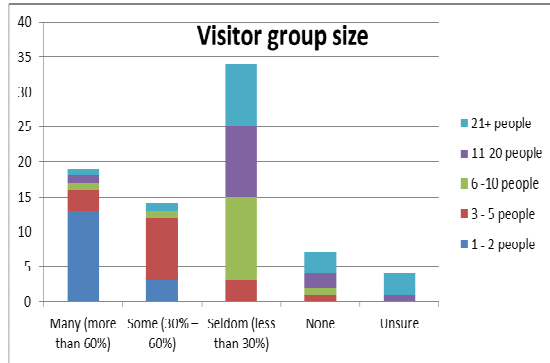


Figure 4: Visitor profile: Central Karoo

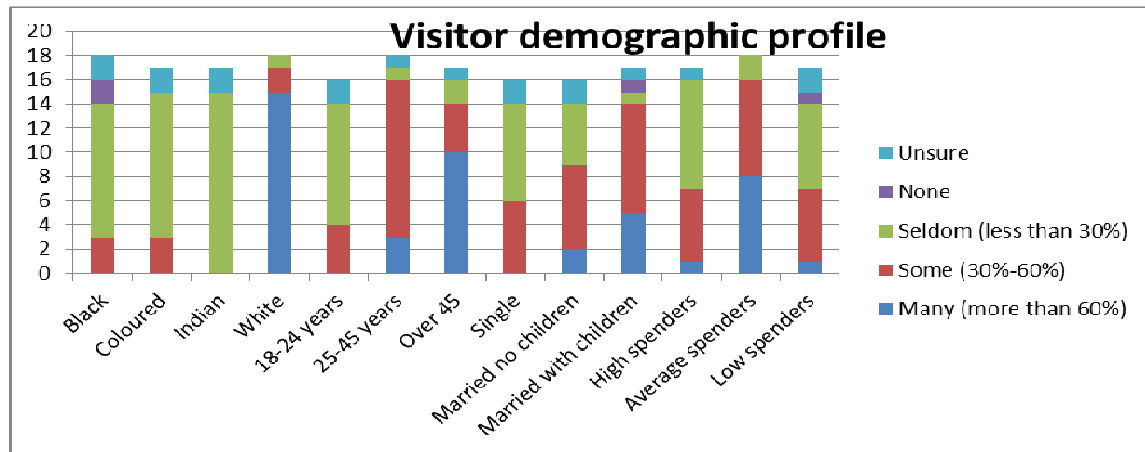
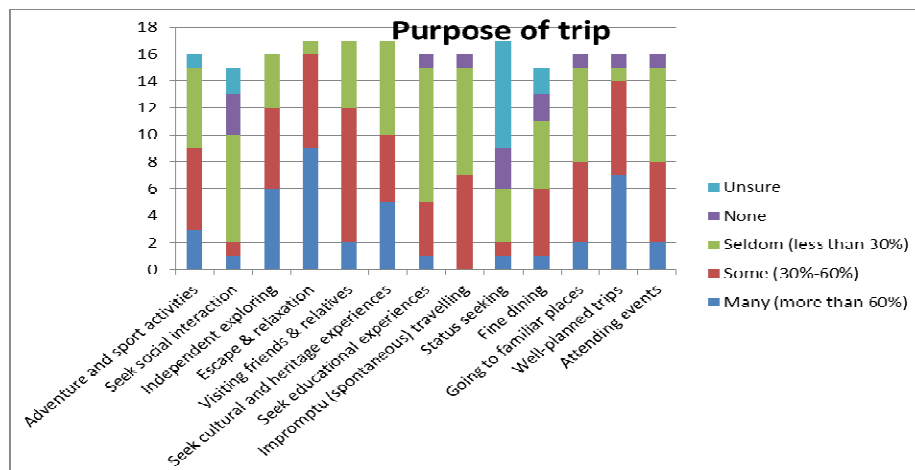


Figure 5: Purpose of trip: Central Karoo





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According to the respondents (18 in total) tourists to the region can be described as follows:

The majority of tourists are white from the over 45 age group.

Most tourists are over 25 years with a substantial number under 45.

Tourists are seldom classified as high-spenders.

Currently blacks as well as tourists in the 18 – 24 age group seldom visit this area.

Tourists to the region generally visit for escape and relaxation, independent exploring, visiting friends and relatives and as part of well-planned trips.

Tourists generally do not come to the region to seek social interaction, educational experiences or for spontaneous exploring.

Tourists to the region mostly travel in groups of five or less, with most in groups of less than three.

Groups of six and more seldom visit the region.

High seasonal months are regarded as December, January and April.

Mid-season is from September to November.

The majority of visitors are from the Western Cape followed by visitors from Gauteng.



ATTRactions IN THE CENTRAL KAROO

Natural attractions

Natural attractions are perceived as safe with easy access to the location as well as accessible to the disabled. A fair measure of attractions is included in group tour packages with relatively good quality facilities. Some of the natural attractions are not easily accessible such as the Gamkaskloof, Die Hel and the Swartberg Pass, although 4x4 vehicles are suitable. These areas are not accessible by bus. Most of the natural attractions do not entertain ablution facilities as they are in unspoilt natural environs.

Authenticity and education are perceived as the best qualities of natural attractions. Criteria such as value for money and well-managed are rated next best, followed by innovation and interactivity, with customer service perceived as the worst (since there are probably no guides/interpretation centres at natural attractions). The most notable experiences are escape/relaxation, followed by excitement/adventure.

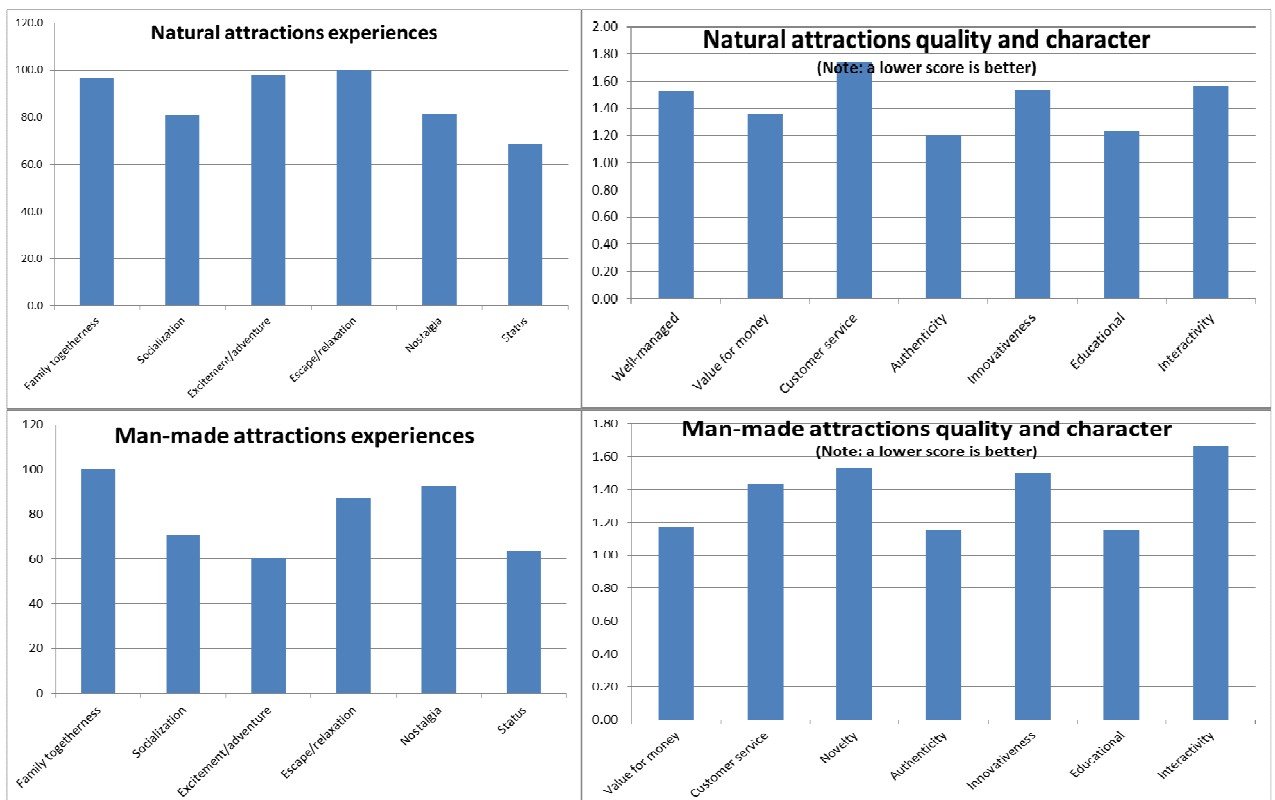


Man-made attractions

General criteria for man-made attractions indicate that safety and ease of access to the location are rated highest. Followed by well-managed and inclusion in group tour packages. Good quality facilities and access to the disabled are rated lowest. Man-made attractions are perceived as authentic and educational, and good value for money. They are perceived as needing more customer service, innovation and lacking in interactivity. Family togetherness is regarded as the most important visitor experience at man-made attractions. Nostalgia and escape are rated as next most important experiences, followed by socialisation and status being the lowest.

Agricultural shows and olive festivals are most frequently mentioned as main events, followed by art and literary festivals. Sports events are least mentioned.

Figure 6: Suitability for the five domestic target market segments: Attractions Central Karoo





ATTRactions IN TERMS OF THE NEEDS OF EACH MARKET SEGMENT

The discussion on each market segment begins with a short summary (*in italics*) of the needs of the specific market segment as derived from the SA Tourism Domestic Segmentation document of 2010, followed by the core findings. Based on these findings a rating is given for each market segment.

SBE (✓ x)

Enjoy multiple destinations and different surroundings. They seek a variety of unusual activities involving socialising with friends, adventure and fun. Shopping and nightlife is also important. They seek value for money.

Natural attractions are successfully supplied in terms of location and accessibility for this market, although the possibility to socialise with friends is limited. Man-made attractions are available but have limited interactivity and novelty also undermining the need for this market to socialise.

NHF (✓✓)

This market enjoys accessible natural places with child-friendly facilities. They want to relax and spend quality time with family and friends. Education and entertainment are of paramount importance, as they want to broaden their children's horizons in terms of cultural and heritage activities.

The supply of the natural and man-made attraction product satisfies the demand of this market.

Attractions are easily accessible and safe, with educational and authentic aspects for both adults and children. Family togetherness and relaxation can be experienced which this market desires.

HLE (x✓)

Singles that pursue the finer things in life. They enjoy must-go or must-see destination of high quality, with exclusive products to boost their social status. They like a variety of traditional South African, but unusual experiences. Socialising with friends is paramount.



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Although the natural attractions are safe and relatively accessible, and can be perceived as 'must sees', they do not sufficiently boost the need for social status of this market and are not well-managed with limited customer service.

SLS(✓✓)

Married, generally no kids, escape and relaxation. Seek products with unique scenery, cuisine. This market seeks a reason to visit a destination i.e. a festival. They pursue special interest activities and hobbies of low impact. Socialising and relaxing with friends and sharing nostalgic moments are important to this market

The natural (Gamkaskloof, die Hel) and man-made (Swartberg Pass) attraction product of the region generally satisfies the demand of the market. The overall scenic beauty of the Karoo, socialising with friends and sharing memories appeals to the needs of this market.

WMF(✓✓)

Travel with children to new scenic destinations of high quality and comfort. This market enjoys hassle-free, quality time with friends and family. They seek entertainment with little 'surprises' and have the desire to expose their children to experiences they were not fortunate enough to have had.

Natural and man-made attractions are both relatively well suited, although they have limited good quality facilities and customer service. Man-made attractions also lack in excitement. However, in terms of family togetherness, relaxation and education this region's supply meets the demand of the market.

GAPS IN THE CURRENT ATTRACTIONS OFFERING

The Karoo does not need artificial attractions. Karoo hospitality in a Karoo environment is quite successful and the assets of the Karoo need to be marketed: peace, relaxation, nature, stillness, authenticity...as well as educating visitors about the Karoo fauna and flora, geological formations, pre-history, paleontology, etc. The development of thematic routes is a possibility, e.g. an Anglo-Boer War route, a rock art and fossil route.

In terms of Laingsburg there are major gaps in too few attractions and no distinct product offering to tourists to increase numbers and spend in the area. As Laingsburg Tourism is relatively "fresh" in their "new" approach to tourism, many plans (business plans) have been developed and proposed to the provincial government. The key in providing products and



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services that will attract tourists may be in “clustering” attractions in the area, such as including Matjiesfontein with Laingsburg in a potential small-town route tour.

Laingsburg Tourism is currently working with Central Karoo Tourism to improve tourism within the region. Laingsburg Tourism has a new plan to change the image of Laingsburg from a “Flood Town” to an “Art Town” and are developing new products and services to strengthen this theme, such as major art (with an agriculture theme) to incorporate with a new putt-putt (mini-golf) course. They also want to use mosaic to enhance the “art” image of Laingsburg.

In the region there is a gap in craft and adventure/extreme sport, although Prince Albert is quite established from a tourism point of view. Other towns in the municipality (Prince Albert road. Leeu-Gamka and Klaarstroom) lack tourism attractions and facilities. There is also political instability and a lack of co-operation to get events off the ground and implemented.



EVENTS AND ACTIVITIES IN THE CENTRAL KAROO

Safety is regarded as the most important criteria of an event, followed by well-managed and authenticity of the event. Value for money and interactivity are next most important. Good service and novelty are next rated with innovation at events regarded as the least met criteria of all.

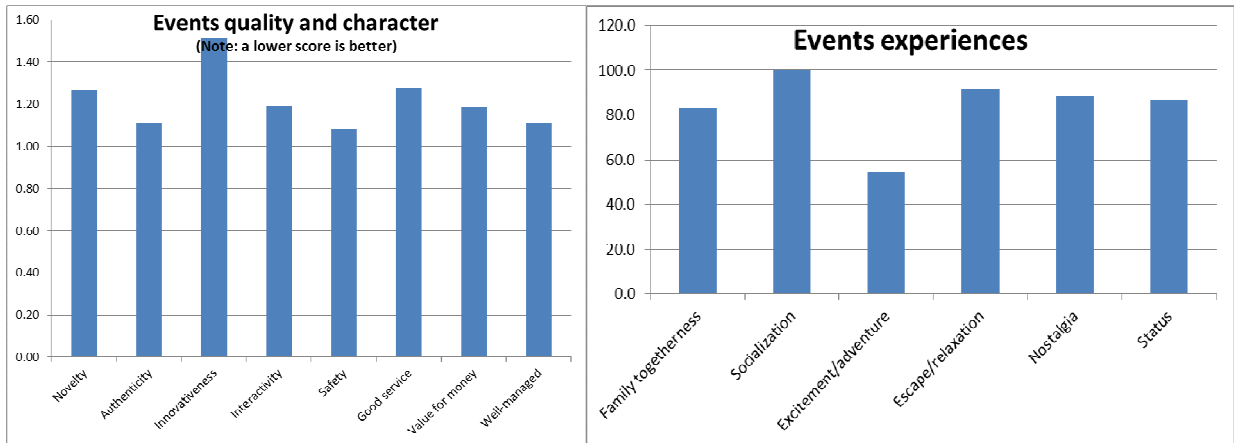
In contrast to attractions, the main event experience is socialisation followed by escape/relaxation, nostalgia and status. The least is family togetherness as an experience. Family togetherness is the highest with excitement/adventure the lowest perceived experience. With regard to family togetherness, lifestyle and religious events are very popular, followed by cultural and sports events being the least popular. Socialisation is very important with lifestyle and cultural events indicating this trend, followed by sport and religious events. For excitement, sports events are the most popular, followed by lifestyle, cultural and religious events. For escapism and relaxation cultural and lifestyle events are pursued, followed by sports events. For status, lifestyle events are frequented.



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**Figure 7: Suitability for the five domestic target market segments: Events and activities
Central Karoo**



SBE (✓✓)

Enjoy multiple destinations and different surroundings. They seek a variety of unusual activities involving socialising with friends, adventure and fun. Shopping and nightlife is also important. They seek value for money.

Events are supplied and satisfy the demand of this market as they are innovative (unusual), novel with value for money. Many lifestyle, cultural (culinary and literary) and sport (Karoo marathon) events satisfy the need for this market to socialise with friends.

NHF (x✓)

This market enjoys accessible natural places with child-friendly facilities. They want to relax and spend quality time with family and friends. Education and entertainment is of paramount importance, as they want to broaden their children's horizons in terms of cultural and heritage activities.

There are many events but they do not address the demand of this market in terms of edutainment for the children and cultural events are not geared to accommodate children. Child-friendly activities such as quad biking and river rafting are also not prevalent. However a sufficient number of activities are available for the accompanying adults.

HLE (xx)

Singles that pursue finer things in life. They enjoy must-go or must-see destinations of high quality, with exclusive products to boost their social status. They like a variety of traditional South African, but unusual experiences. Socialising with friends is paramount.



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Events and activities are not sufficiently unusual, innovative or novel to satisfy the needs of this market. Although relatively authentic events may be hosted they are not of high enough status or of 'designer quality' to boost this market.

SLS(✓✓)

Married, generally no kids, escape and relaxation. Seek products with unique scenery, cuisine. This market seeks a reason to visit a destination i.e. a festival. They pursue special interest activities and hobbies of low impact. Socialising and relaxing with friends and sharing nostalgic moments are important to this market

Events in all areas are sufficient as well as special interest low-impact activities such as birding, fossil hunting, dining, photography, etc. are well developed for this market.

WMF(✓x)

Travel with children to new scenic destinations of high quality and comfort. Enjoy hassle-free, quality time with friends and family. Seek entertainment with little 'surprises'. Desire to expose their children to experiences they were not fortunate enough to have had.

Although there is an abundance of supply in terms of events and activities, they lack in terms of novelty, innovativeness and interactivity, and do not at this stage satisfy the demand of the market for entertainment with a surprise element. Activities such as horse riding, rock climbing and fishing are popular.

GAPS IN CURRENT EVENTS OFFERING

The Central Karoo has no major event at all besides the various agricultural shows. To create one major event would be a booster. There remains huge room for improvement and expansion in terms of event offerings.

Laingsburg does not have enough events that could potentially attract more tourists, with the major issue being funds/money. Therefore Laingsburg doesn't have enough "power" to pull tourists to the area as it has to compete with other (stronger) attractions and towns within the larger region. Events are always in competition with others in the region due to the same dates/months, and people also need sufficient leisure time to travel to these events.



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POTENTIAL TOURISTS FINDING INFORMATION ABOUT THE ATTRACTIONS & EVENTS ON OFFER

The Karoo has a good tourism website, although the region is not well marketed nationally and internationally. There is no common brand/marketing/website for the Karoo as an entire region. There is excellent information available on websites but very little printed information available at kiosks. The local tourism office and website is very informative with a very good, regularly updated website and an efficient and informative Tourism Office. Prince Albert is very well represented in travel books, magazines, websites, internationally as well as locally. There is an excellent Prince Albert tourism website:
www.patourism.co.za

TOURISTS IN THE AREA FINDING INFORMATION ABOUT THE ATTRACTIONS & EVENTS ON OFFER

Prince Albert has a good tourism office. Information is available online or at the tourism bureau or at some of the guesthouse/hotel. Not all towns have good information centres. It is not easy to find information about all the events and activities and attractions, as there are no "office" nor signage to information offices.

RECOMMENDATIONS FOR THE CENTRAL KAROO IN TERMS OF ATTRACTIONS, EVENTS AND ACTIVITIES

Natural and man-made attractions can improve the quality of their facilities and management/customer service to attract the high-end market (HLE and WMF). Interactive edutainment events with a cultural flavour, as well as child-friendly activities are recommended. The Karoo region could collaborate to host an annual Karoo Week, where all the Karoo towns can work together to attract tourists.

A PRACTICAL SUGGESTION

A travelling 'designer' event', with an alternating theme could be hosted annually with stops in Beaufort West/Kwa-Mandelkosi, Leeu-Gamka, Prince Albert, Laingsburg and Matjiesfontein. An event such as an 'Art Design Indaba' (extension of the 100 Art dustbins



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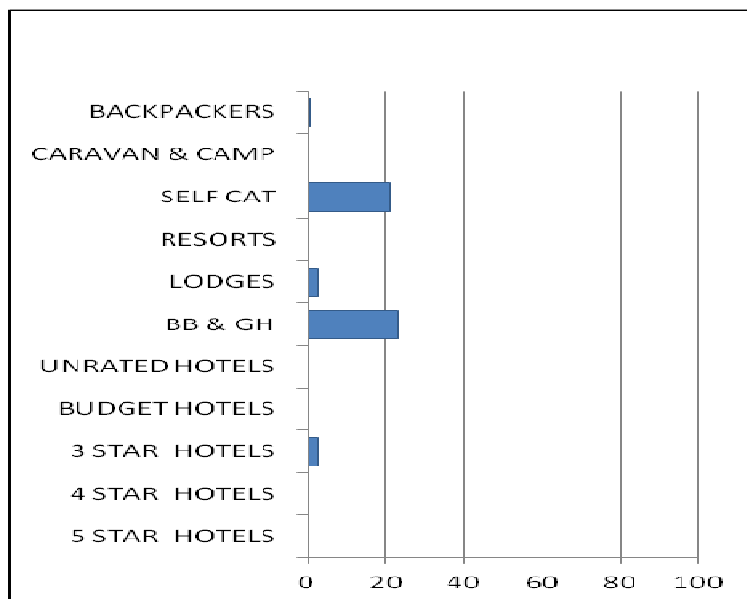
in Prince Albert)/'Designer Cuisine Indaba' (e.g. cheese/karoo lamb in Beaufort West)/etc.; can be extended to include Sutherland with a 'Designer Cosmos Indaba' to coincide with cosmos/stargazing occurrences.



ACCOMMODATION IN THE CENTRAL KAROO

There is a fair number of accommodation establishments available in the Central Karoo which includes mainly guest houses, bed & breakfasts and self-catering units. They are fairly accessible and prices range from reasonable to very high. Online booking systems are satisfactory and some towns can improve their marketing. There is not sufficient accommodation for large groups which limit the facilities for package tours.

Figure 8: Accommodation in Central Karoo



Source: Safarinow (2012)

SBE (x x)

Spontaneous budget explorers prefer the following types of accommodation establishments: bed and breakfasts; guest houses; budget hotels; self-catering units; backpackers; hostels and camping. Affordability, easy booking procedures and flexible



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accommodation programmes are important for this market segment. They enjoy on-site adventure activities, to have fun with friends and to meet new people.

There are very few backpackers and camping sites in this tourism node. Suppliers generally do not offer activities on site for the 18- 24 age group and have limited areas for social interaction. The Central Karoo is not a coastal region, which is preferable for SBEs, and also doesn't offer sufficient shopping facilities and nightlife activities. Three Star accommodation rates are in general affordable and offer value for money.

NHF(✓✓)

New Horizon Families prefer the following types of accommodation establishments: bed and breakfasts; guest houses; 3 star and budget hotels and self-catering units.

Affordability, accessible locations and child-friendly accommodation are important for this market segment. They favour natural places where they can partake in relaxing family activities and educate their children.

There are sufficient self-catering units which enable parents to plan more economical trips. There is a lack of children facilities and inter-leading family rooms in small town guest houses. There are not sufficient activities in the area for NHFs and their children. They cannot make use of the discounted rates during low-season as they normally go on vacation during school holidays.

HLE(××)

High life enthusiasts prefer the following types of accommodation establishments: 4 and 5 star hotels, lodges and self-catering units. High quality products, easy booking procedures and all-inclusive packages are important for this market segment. They enjoy home-grown accommodation establishments close to urban areas with a variety of activities and unusual tourist experiences.

The Central Karoo does not serve the HLEs because there are limited lodges and 4 and 5 star hotels. There are a sufficient number of self-catering units. HLEs prefer urban areas and not the small towns of the Central Karoo. The area doesn't offer high quality products that contribute to their social status. HLEs would rather prefer other 'must-go' tourist destinations instead of the Central Karoo.



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SLS(x✓)

Seasoned leisure seekers prefer the following types of accommodation establishments: 3, 4 and 5 star hotels, lodges, bed and breakfasts; guest houses and self-catering units. Value for money, special interest offerings and unique destinations are important for this market segment. They prefer accommodation establishments in natural areas that offer local cuisine and low-impact activities.

The node offers sufficient bed & breakfasts, guest houses and self-catering units for SLSs but the node offers limited 4 and 5 star hotels and lodges. The node is ideal for SLSs as there are surrounding areas that they can explore and a variety of low impact activities. This is a suitable location where they can relax and spend quality time with family and friends.

WMF(x x)

Well to-do-mzansi families prefer the following types of accommodation establishments: 3, 4 and 5 star hotels, lodges, bed and breakfasts; guest houses and self-catering units. High quality products, child-friendly accommodation and all-inclusive packages are important for this market segment. They enjoy exclusive accommodation establishments in natural areas with a variety of family activities to educate their children.

The node does not cater for the WMFs as there are not sufficient 4 & 5 star hotels and lodges. They can stay over in bed & breakfasts, guest houses and self-catering units. On-site activities might not interest the WMFs and rates are normally not inclusive.

GAPS IN THE CURRENT ACCOMMODATION OFFERING

In the Central Karoo district there are a limited number of accommodation establishments, with guest houses and self-catering establishments forming the bulk of it. This creates a major gap in the market and ignores the needs of various market segments due to the limited type of accommodation establishments on offer. Although most of the operators in the area are using the web for bookings, a number of the smaller establishments must still make the transition. Limited activities are provided by establishments and therefore the opportunity for social interaction is totally restricted. Inclusive pricing for packages are basically non-existent and the perception of value for money in the area is very moderate. Service levels in the area are fairly moderate and more marketing of accommodation



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establishments should be done on a broader basis.

RECOMMENDATIONS FOR THE CENTRAL KAROO IN TERMS OF ACCOMMODATION

To make this node more attractive for the five new market segments, accommodation establishments must pay attention to family accommodation facilities and activities on site. Package tours and inclusive rates should be considered and strategic alliances should be established amongst tourism operators in the area. This will enable operators in the area to grow their occupancy levels and co-operatively work together for the benefit of all stakeholders. This will also enable the operators to distinguish themselves as quality establishments.



TRANSPORT TO THE CENTRAL KAROO

There is a strong view that the distance of the closest airport to the region is detrimental to growing tourist numbers. Air access is restricted by lack of airport (closest is George) and an existing airstrip not suitable for larger aircraft. Public transport inadequate - the towns that are not on the N1 route are difficult to access via intercity buses (only stop in Beaufort West and Laingsburg) and rail services (only stop Kimberley?).

Currently car is the most effective mode of transport to the region for small parties.

Air access limits connection to car rental facilities.

Minibuses - Lack of awareness about potential of this mode as a tourist generator – current users not seen as potential tourists. There is overwhelming support for more of this mode to increase tourist numbers but information and promotion seem to be problem areas.

Most of the towns in the area are not linked to the main rail system. Not enough information or promotion of this mode and bookings appear to be difficult.

General road conditions classified as good.

SBE (✓✗)

They drive to the destination but for further destinations they may take a bus or fly on a low cost carrier. Part of the holiday is the journey. Socialising, adventure, fun. Affordability.



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Private vehicle suitable but only for small numbers, limit socialisation en route (possible with Minibuses).

Low cost carriers (LCCs) are available to George

Certain areas inaccessible (Swartberg Pass) – hindrance. Most SBEs won't have a 4x4. Affordability – rail not available (stops in Matjiesfontein), minibuses (not for tourists at this stage – no information), intercity busses (must link with other mode eg car rental then affordability becomes compromised).

To develop tourism for this segment would require a coordinated effort of improving the supply of services while at the same time promoting the region to stimulate demand.

NHF (✓✓)

Drive or take a bus to their destination. Educate their children.

Affordability, accessibility by road.

Road conditions to certain attractions may be problematic.

Private vehicle ideal for families, while intercity buses to certain towns within the region are also available.

HLE(xx)

Singles - Boost status, finer things in life –drive to destinations close by and fly to destination further afield, likely to hire a car if they fly somewhere but aren't impressed having to drive a car that is less luxurious than what they drive at home.

Can't fly, must drive, car rental available, region does not suit profile. Although self-drive is available, distance from airport problematic.

SLS(✓✓)

Married, generally no kids, escape and relaxation

Drive close by, fly further afield.

SLS falls within current market profile, will self-drive and seek escape.

WMF(✓✓)

Drive or fly depending on how close the destination is. Educate their children.

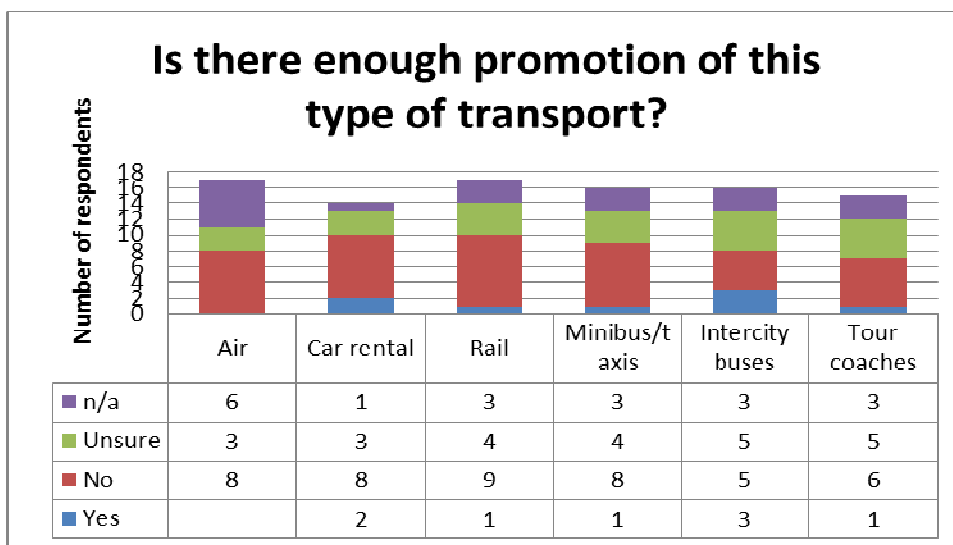
They will self-drive with family (kids) and they have money for vehicle rental, so they can travel to remote areas with 4x4. Inaccessibility is thus not too much of a problem.



TOURISTS FINDING INFORMATION ABOUT TRANSPORT

From Figure 9 (below) it seems clear that there is a lack of promotion on all modes of transport within the node. What is more, information on the modes of transport also seems to be insufficient.

Figure 9: Promotion of transport in Central Karoo



GAPS IN THE CURRENT TRANSPORT OFFERING

There is a strong view that the distance of the closest airport to the region is detrimental to growing tourist numbers. Air access is restricted by lack of airport (closest is George) and existing airstrip not suitable for larger aircraft.

Public transport inadequate - the towns that are not on the N1 route are difficult to access via intercity buses (only stop in Beaufort West and Laingsburg) and rail services.

Minibuses - Lack of awareness about potential of this mode as a tourist generator – current users not seen as potential tourists.

Overwhelming support for more tour coaches to increase tourist numbers but information and promotion seem to be problem areas.

Most of the towns in the area are not linked to the main rail system. Not enough information or promotion of this mode and bookings appear to be difficult.





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RECOMMENDATIONS FOR THE CENTRAL KAROO IN TERMS OF TRANSPORT

Air access is the main deterrent to this region and utilisation of the local airstrip should be considered for smaller groups. More promotion on the rail link from Matjiesfontein to the whole region should be looked at. Minibuses should be developed as a mode for tourists to and within the region. Consideration should be given to better accessibility to the region via intercity busses.

TOURS TO AND WITHIN THE CENTRAL KAROO

 Group tours (to the region)	 Local tours (within the region)
<p>It seems that approximately 10 – 15% of tourists that come to the area are part of organised group tours. Not enough group tours to region, according to respondents. Some problems with accommodation for groups in season in some areas. Accessibility of attractions might be a deterrent. Information on tours not always adequate. Consensus that promotion of group tours to the area is bad. One respondent said “There is no product to sell”. Demand is lacking. Opinions on affordability of tours divided. Incoming tour operators deemed professional.</p>	<p>There is a divided opinion on whether there are enough local tours available. Travel information Centres and accommodation establishments appear to be most effective in promoting local tours. Promotion on regional websites generally felt to be effective. Booking facilities quite easy for local tours. Traditional media (e.g. radio, TV, billboards newspapers) not used/effective at all in promoting local tours. Tour operators seem to be quite effective in promoting local tours. Opinions must be viewed against town of origin of respondent.</p>
<p>SBE (x✓) <i>Ideal packages for SBEs should sell ‘fun with friends’ e.g. driving trip promotions, road trip (tour of SA on a bus for two weeks with other young South Africans. Packages</i></p>	<p>SBE (xx) <i>Activity-driven day trips</i> Not many local activities perceived to be available. This region offers peace, relaxation, nature, stillness and authenticity.</p>



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<p><i>provide SBEs with the opportunity to visit multiple destinations without too much organisational hassle while enabling them to pay most of the costs upfront. Overland safaris are ideal.</i></p> <p>Promotion of tours to region seems to be the main problem. Group tours to the region are often only stop-over tours for further travel, region is not the destination.</p> <p>Accommodation for large groups limited.</p> <p>Region has potential for exploring, many adventure activities are available but not utilised yet for this market.</p>	<p>This market wants adventure and socialisation.</p>
<p>NHF (x✓)</p> <p><i>Products that centre around learning new things and spending time with family. Child-friendly holiday packages and educational trips. Will take a bus to destination, affordable product, culture, heritage and nature.</i></p> <p>Limited group and packaged tours except as stopovers. If area better known, perhaps could serve as a destination.</p>	<p>NHF (x✓)</p> <p><i>Heritage activities. Day trips that have an educational element would be ideal.</i></p> <p>Plenty of educational and adventurous activities available but not well-packaged into local tours.</p>
<p>HLE (xx)</p> <p><i>Want glamour and comfort from their holidays</i></p> <p>Not a market for group tours and packages.</p>	<p>HLE (xx)</p> <p><i>Have the option for numerous activities but allow the consumer to choose to do activities as and when they please.</i></p> <p>Many local activities but may not meet profile of this group in terms of glamour.</p>
<p>SLS (xx)</p> <p><i>Enjoys special interest activities and hobbies. Incorporate something different and memorable such as beautiful scenery</i></p>	<p>SLS (x✓)</p> <p><i>Enjoys different activities and new experiences</i></p> <p>Many local activities available but not well</p>



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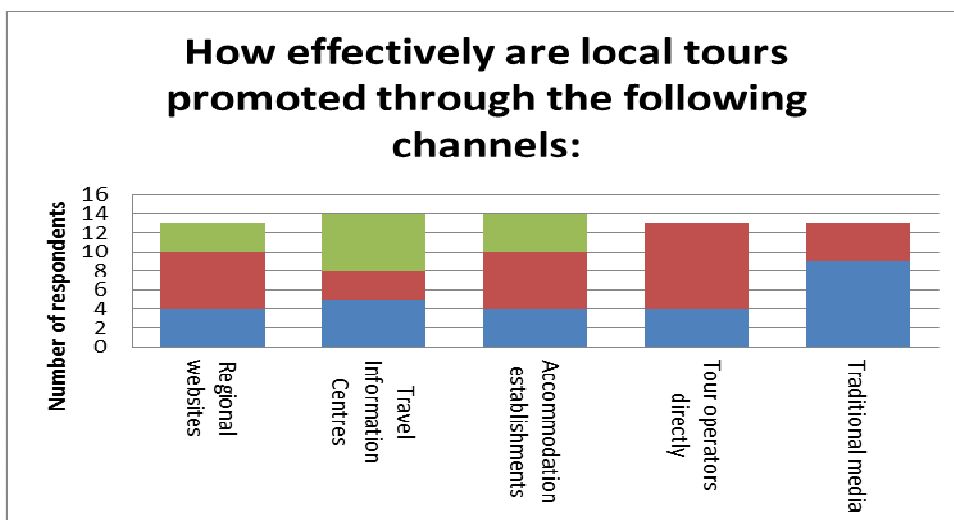
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<p><i>and local culture.</i></p> <p>Not regular group tour enthusiasts.</p>	<p>promoted or packaged.</p>
<p>WMF (x x)</p> <p><i>Products that are comfortable and hassle-free with a variety and abundance of activities and entertainment such as all-inclusive premium packages and family safaris. Large group tours not suitable, individual-type packages more effective.</i></p> <p>Limited supply currently in “organised” format for this group.</p>	<p>WMF (x ✓)</p> <p><i>Like variety and educational activities for children.</i></p> <p>Lots of activities that meet these requirements but generally not well packaged or promoted.</p>

TOURISTS FINDING INFORMATION ABOUT PACKAGES ON OFFER

Travel information Centres and accommodation establishments appear to be most effective in promoting local tours. Promotion on regional websites generally felt to be effective. Booking facilities quite easy for local tours. Traditional media (e.g. radio, TV, billboards newspapers) not used/effective at all in promoting local tours. Tour operators seem to be quite effective in promoting local tours (see figure). Opinions must be viewed against town of origin of respondent.

Figure 10: Effectiveness of promotion of local tours: Central Karoo





GAPS IN THE CURRENT PACKAGES OFFERING

Most respondents believed that more tour coaches to the area will increase tourists to the Central Karoo. Access to certain attractions in the region seems to be a problem hindering tour packages. Promotion of group tours to the area is limited, especially at national level. Some respondents also believed that there are not enough tour packages to the area, because there are not enough attractions available to include in packages. Accommodation seems to be limited, especially for larger groups.

OVERALL RECOMMENDATIONS

Some towns do exceptionally well e.g. Laingsburg and Prince Albert but the region as a whole does not coordinate well to produce regional-type group tour packages that highlight the attractions of the whole area. Regional cooperation is needed. Local activities are not well promoted and more support should be provided to local operators to promote their local packages or activities e.g. regional website and local TIC as a coordinating body for promotion. Resources should be used to provide more information on region's local activities.

Prince Albert – A success story for local tours

A problem experienced in most of the researched nodes is that of promotion of local tours. One town in the Central Karoo which has overcome this problem by creating an informative, attractive website, promoting and providing information on all the local tours available in the area is Prince Albert. The website provides comprehensive information on every activity and local tour offered in the town. Most of the local tour operators promoted on the website have also created their own websites, and direct links to these websites are found on the Prince Albert website. Prince Albert has a Facebook page, and although not providing specific information on packages on the page, it does provide up-to-date information on happenings in the town.



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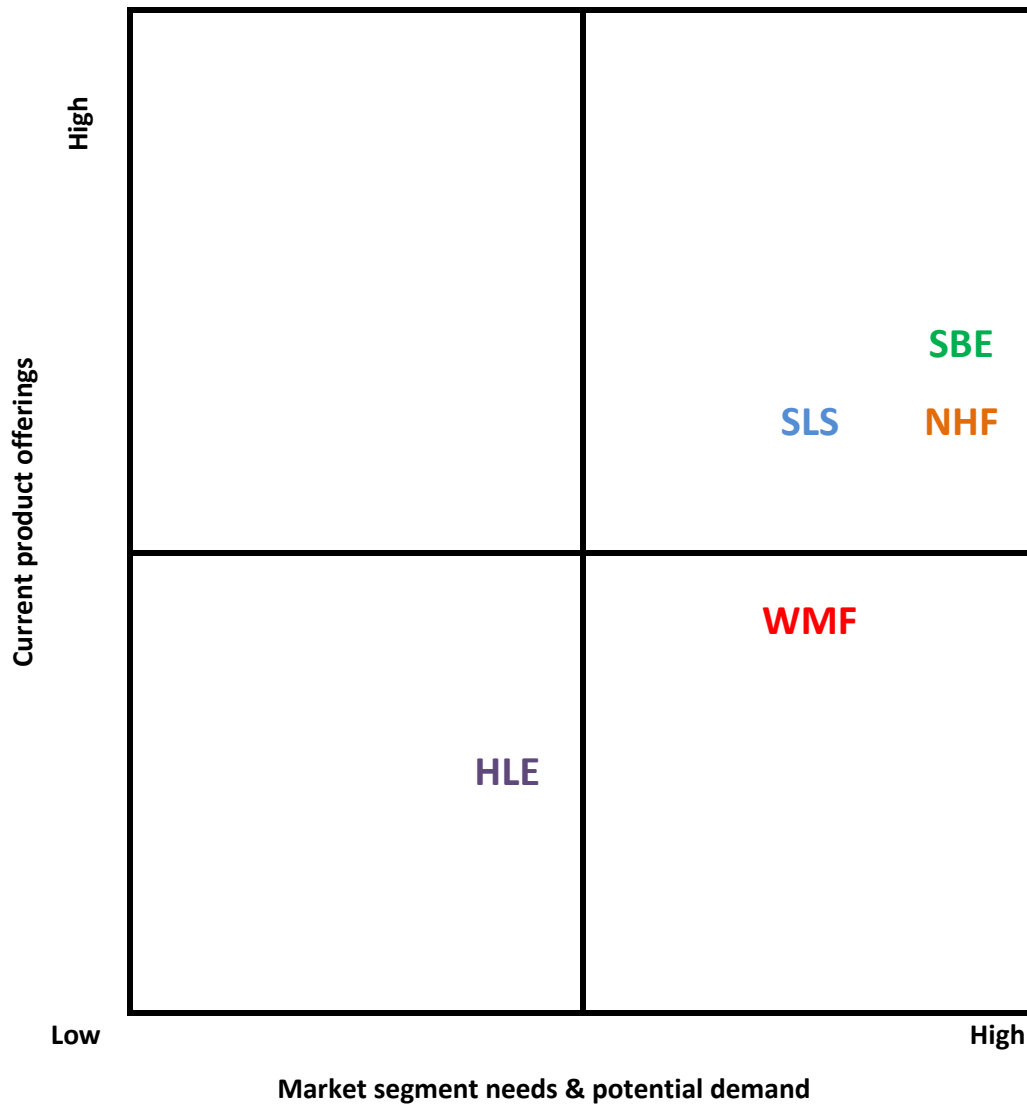
The screenshot shows a Windows Internet Explorer browser window displaying the Facebook page for Prince Albert Tourism. The browser's address bar shows the URL: <http://www.facebook.com/pages/Prince-Albert-Tourism/188321521224000?ref=stream>. The Facebook page features a cover photo of a town with a church and mountains. A post on the page reads: "Prince Albert - 250 Years 1762 - 2012 honour our Roots - Inspire our Youth or ont Verlede - Inspireer ons Jou". The page has 80 likes and a "Message" button. The right sidebar contains sponsored ads for Mercedes-Benz, Spitz, and Sunshine Academy of Metaphysics. The Windows taskbar at the bottom shows the time as 09:05 AM on 2012/12/05.

The screenshot shows a Windows Internet Explorer browser window displaying the website <http://www.patourism.co.za/index.htm>. The website has a navigation menu on the left with links: Home, Prince Albert, Kluisroom, Leea Ganka, Contact us, Newsletter, Where to stay, Where to eat, What to do, What to buy, Essential services, Forthcoming events, Museum, Saturday market, Map, Scenic drives, and Swarberg Pass. The main content area features the heading "Prince Albert Western Cape South Africa" and "250 YEARS OLD IN 2012". Below this is a link: "FOR INFORMATION ON OUR 2012 CELEBRATIONS CLICK HERE". A large image shows a dirt road through a landscape with mountains and a sign that says "Prince Albert". A quote at the bottom reads: "The nothingness (die niks), the wide open spaces and the deafening stillness... balm for the soul at". The Windows taskbar at the bottom shows the time as 09:22 AM on 2012/12/05.



6.4.2 WEST COAST

Current product offerings in terms of market segment needs and potential demand





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GENERAL PROFILE OF TOURISTS TO THE WEST COAST

According to the respondents (22 in total) the tourist profile of the West Coast can be described as follows:

Figure 11: Visitor group size: West Coast

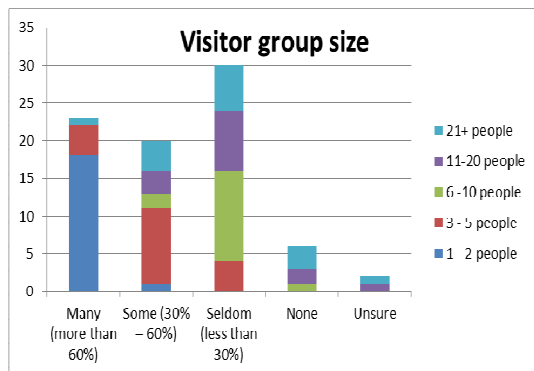


Figure 12: Visitor demographic profile: West Coast

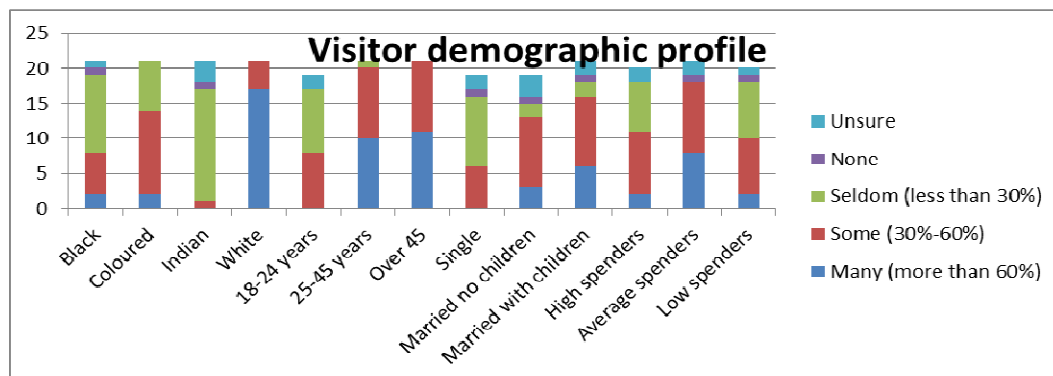
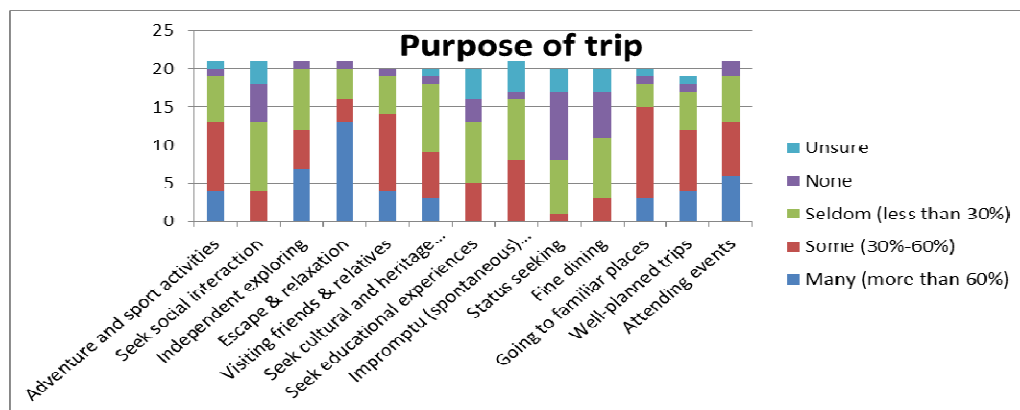


Figure 13: Purpose of trip: West Coast





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The majority of tourists are white over the age of 25.

A substantial number are under 45.

Most tourists are classified as average-spenders.

Currently blacks and Indians seldom visit the area.

Coloureds sometimes visit the area.

The 18 – 24 age group of tourists are classified as sometimes visiting this area.

Tourists to the region generally visit for escape and relaxation, independent exploring, attending events, visiting friends and relatives, going to familiar places and adventure seekers.

Travel as part of well-planned trips.

Tourists generally do not come to the region to seek social interaction, educational experiences, status, fine dining or for spontaneous exploring

Tourists to the region mostly travel in groups of five or less, with most in groups of less than three.

Groups of six and more sometimes visit the region.

High seasonal months are regarded as December, January, February, April, August and September.

Mid-season is March, October, November.

The majority of visitors are from the Western Cape followed by visitors from Gauteng.



ATTRACTIONS IN THE WEST COAST

Natural attractions

The majority of the natural attractions in the region are included into tour packages. They are easily accessible, however are not perceived to be accessible to the disabled in all cases. Safety is rated high, and the quality of facilities is satisfactory.

Authenticity is regarded as the main characteristic of natural attractions, while innovation is regarded as the weakest quality. This may relate to the manner in which these attractions are made available to visitors through interpretive measures such as signage and tour guides. Majority of the natural attractions do not charge any entry fees and are therefore regarded as value for money. The majority of respondents are of the opinion that the attractions offer experiences of family togetherness, escape and relaxation. These



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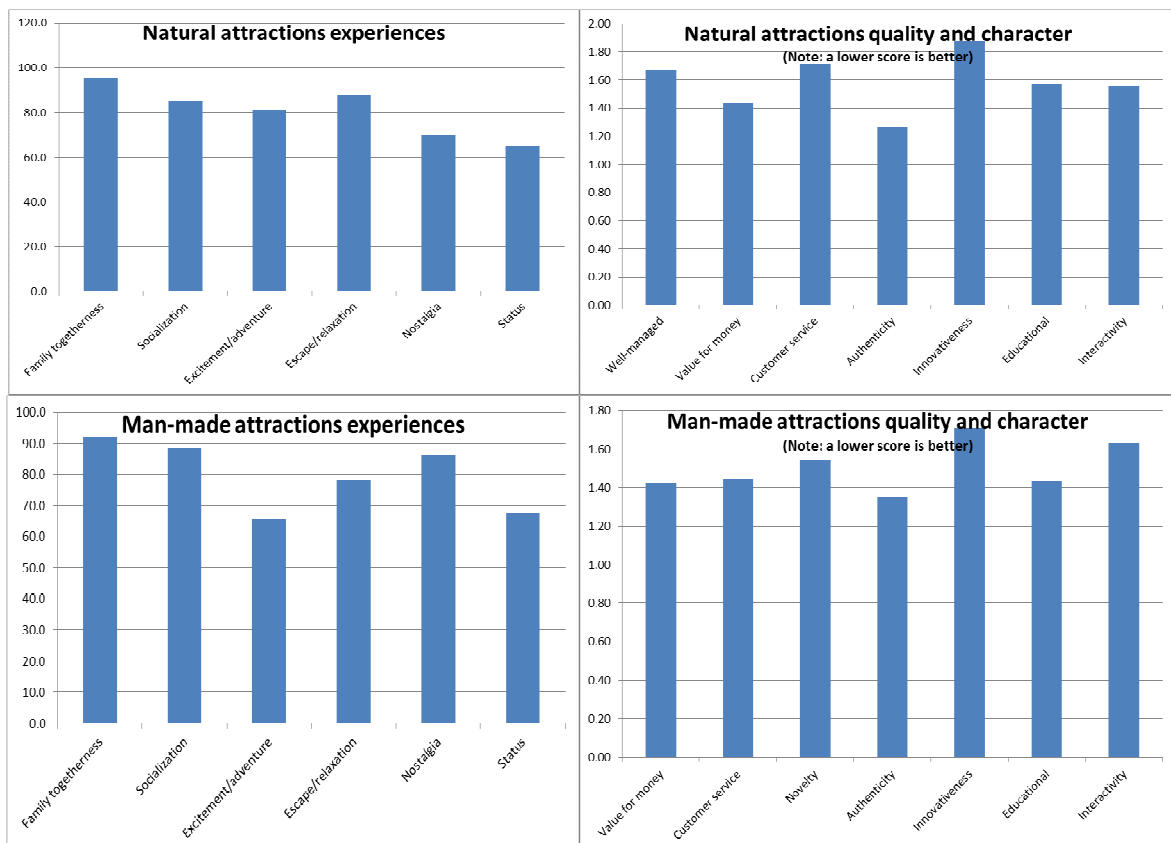
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attractions are not necessarily regarded as 'must-see' and therefore lack an element of status passed on to visitors.

Man-made attractions

Man-made attractions are regarded as safe, well-managed and easily accessible (though not always for the disabled). Other comments include: that safety is at one's own risk with no life guards on beaches. The man-made attractions are also regarded as being authentic. Of concern is the fact that they are rated poorly in terms of innovation, interactivity and novelty, which are important criteria for man-made attractions. The attractions are perceived to offer family togetherness, socialisation and feelings of nostalgia to visitors, but are lacking in excitement and a sense of adventure.

Figure 14: Suitability for the five domestic target market segments: West Coast





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SBE (✓✓)

Enjoy multiple destinations and different surroundings. This market seeks a variety of unusual activities involving socialising with friends, adventure and fun. Shopping and nightlife are also important. Value for money is important.

This region is generally suitable for this market segment with natural attractions (e.g. the West Coast biosphere reserve, Verlorenkloof, Cederberg Mountains, fauna and flora) and man-made attractions (e.g. San rock art, mission stations, wine routes) satisfying demand for socialising, adventure and variety.

NHF (✓✓)

This market enjoys accessible natural places with child-friendly facilities. They want to relax and spend quality time with family and friends. Education and entertainment are of paramount importance, as they want to broaden their children's horizons in terms of cultural and heritage activities.

This market is generally satisfied with the available product offering in terms of natural and man-made attractions, although the natural and man-made product attributes could improve in terms of educational and interactive aspects to address the needs of the accompanying children.

HLE (x✓)

Singles - finer things in life. They enjoy must-go or must-see destinations of high quality, with exclusive products to boost their social status. They like a variety of traditional South African, but also unusual experiences. Socialising with friends is paramount.

The natural attractions' experiences do not appeal to this market as they demand customer service and sophisticated experiences for social status; while man-made attractions are authentic (e.g. bird island at Lamberts bay) with good quality facilities but they are not perceived as the necessary status experiences by this market.

SLS(x✓)

Married, generally no kids, escape and relaxation. Seek products with unique scenery, cuisine. This market seeks a reason to visit a destination i.e. a festival. They pursue special interest activities and hobbies of low impact. Socialising and relaxing with friends and sharing nostalgic moments are important to this market



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Natural and man-made attractions are supplied to this market, although the product attribute of authenticity is lacking in both instances; and the nostalgic experience lacking at the natural but not at the man-made attractions. Socialisation at both attractions appears satisfactory.

WMF(✓✓)

Travel with children to new scenic destinations of high quality and comfort. This market enjoys hassle-free, quality time with friends and family. They seek entertainment with little 'surprises' and have the desire to expose their children to experiences they were not fortunate enough to have had.

Satisfactory natural and man-made attractions in terms of being well-managed, accessible, safe and with good facilities. The criteria of excitement, Interactivity and education should be enhanced for the children's market.



EVENTS AND ACTIVITIES IN THE WEST COAST

The major festivals in the region, as well as the flowers are packaged within organised tour packages. There are festivals during every month of the year, with the majority being presented during the months of August to October to coincide with the flower season.

The region offers a great variety of cultural and lifestyle events in various locations. They are perceived to be safe to attend and also offer an opportunity for visitors to interact. They may however lack in innovation and novelty, with a great repetition in the nature of the festivals (culinary as focus).

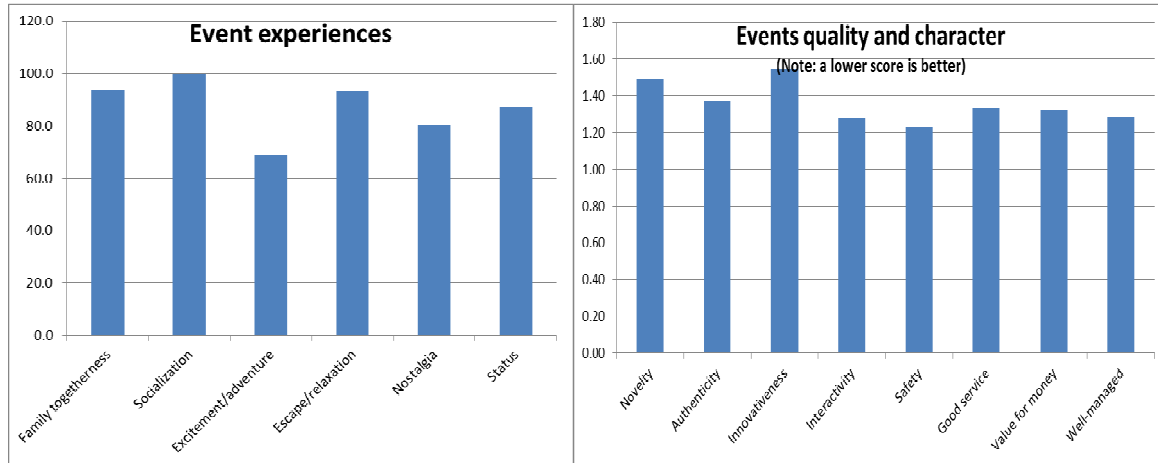
The events are not perceived as being exciting or adventurous in nature. They do offer visitors opportunities for socialisation, family togetherness and escape/relaxation as a main feature, which fits in with the known character of such cultural and lifestyle events.



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Figure 15: Suitability for the five domestic target market segments: West Coast



SBE (x✓)

Enjoy multiple destinations and different surroundings. They seek a variety of unusual activities involving socialising with friends, adventure and fun. Shopping and nightlife is also important. They seek value for money.

Various art, cultural and cuisine festivals exist but do not address this market's desire for variety in shopping and nightlife.

NHF (x✓)

This market enjoys accessible natural places with child-friendly facilities. They want to relax and spend quality time with family and friends. Education and entertainment is of paramount importance, as they want to broaden their children's horizons in terms of cultural and heritage activities.

Events and activities in terms of edutainment are demanded by this market, but not supplied, as most events are focused on an adult market (e.g. wine route activities, crayfish and cultural festival, the West Coast Marathon and Berg River Canoe Marathon – all for adults).

HLE (✓✓)

Singles that pursue the finer things in life. They enjoy must-go or must-see destination of high quality, with exclusive products to boost their social status. They like a variety of traditional South African, but unusual experiences. Socialising with friends is paramount.

Traditional cultural and lifestyle events such as wine and crayfish festivals (e.g. Uoung wine show, Shiraz and Art, Wonderful wine, Crayfish and Cultural festival, Olive festival, Rocking



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the daisies) are demanded by and supplied to this market to enhance their need for socialising which contributes to their social status.

SLS(✓✓)

Married, generally no kids, escape and relaxation. Seek products with unique scenery, cuisine. This market seeks a reason to visit a destination i.e. a festival. They pursue special interest activities and hobbies of low impact. Socialising and relaxing with friends and sharing nostalgic moments are important to this market

The supply of events and activities is generally satisfactory with social experiences and relaxation high. Many events and activities in all categories are available for this market, from sport and cultural to lifestyle and religious (e.g. road and cycle marathon, music, art and cuisine festivals, wildflower and agricultural shows.

WMF(x✓)

Travel with children to new scenic destinations of high quality and comfort. This market enjoys hassle-free, quality time with friends and family. They seek entertainment with little 'surprises' and have the desire to expose their children to experiences they were not fortunate enough to have had.

Many events and activities exist in this region although none that specifically address the edutainment aspect desired by adults for their children in this market.

GAPS IN THE CURRENT ATTRACTIONS AND EVENT OFFERING

There are still a lot of attractions that can be developed to reach the main stream, as the area's unique selling propositions (USP) are not utilized; smaller more authentic. Experiences are needed; more nightlife, spa facilities, well-packaged cultural products and entertainment centres. Although there are many smaller events the West Coast needs one 'major' event to draw tourists; this could be a packaged tour experience. There are many events on the West Coast but a lack of promotion of them – these events can also be promoted in Cape Town as tour packages. Tourists want to travel beyond Darling, Yzerfontein and Langebaan maybe on tour packages as this has never been offered. Cinemas and a tour bus service to surrounding towns and West Coast National Park for the elderly and disabled is needed, as well as better facilities.



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POTENTIAL TOURISTS FINDING INFORMATION ABOUT THE ATTRACTIONS & EVENTS ON OFFER

There is a newly formed tourism organisation and active marketing team creating a website and making use of the web and social media as well as brochures and maps. There are excellent information offices with brochures, a website and newsletters of events (e.g. Weslander) and event guides, although not always well publicised and promoted due to insufficient funding.

Cederberg tourism has a very up-to-date website which they maintain themselves – they can immediately make changes to the website when necessary. They also have brochures for the whole region (Cederberg) with more general information about hiking, dining and cultural activities as well as the contact details of all the offices in the Cederberg region. Their events calendar of the region is available on the national, provincial and regional websites; and is also available in the regional, sub-regional and town print media. It seems that many tourists are unaware of the mountain (Cederberg) and the flower season.

TOURISTS IN THE AREA FINDING INFORMATION ABOUT THE ATTRACTIONS & EVENTS ON OFFER

Tourists can find information as there are information centres in each town (three main centres in the regions) and many information points, although information kiosk not open on weekends. Towns have the ability to promote attractions, although events and activities are limited due to insufficient funding. Information from the information offices is adequate about accommodation, events and attractions.

About 90% of the towns on the West Coast have well signposted Tourism Information offices; and are manned by well-informed officials. The tourism office is good and locals mostly knowledgeable and helpful.

All petrol stations and shops keep information brochures for potential tourists, although most people use Garmins/mobile internet which shows the attractions on mobile internet.



RECOMMENDATIONS FOR THE WEST COAST IN TERMS OF ATTRACTIONS, EVENTS AND ACTIVITIES

Natural and man-made attractions are recommended to include an element of excitement in their offering, to improve educational and interactive aspects, and ultimately to deliver an authentic experience to address the needs of adults and accompanying children. Selected events and activities should be repackaged to include edutainment to satisfy the family market.

SOME PRACTICAL SUGGESTIONS

Natural attractions: San Rock Art Route

The development of an educational rock art route is recommended, starting at the !Khwa Hu San Centre (on R27 between Yzerfontein and Darling), to the Fossil Park in Langebaan, Aurora, Piketberg, Elandsbaai, Graafwater, Klaver and ending in VanRhynsdorp.

Man-made attractions: Mission Station Route

The development of the 10 mission stations into a packaged route is recommended: Starting at Mamre (Moravian); Wittewater/Goedverwacht (Moravian); Wupperthal (Moravian); VanRhynsdorp, Troe-Troe; Papendorp/Ebenhaeser, Elandskloof (Dutch Reformed) Vergenoeg, Rietpoort (RCC) near Vredendal.

Event Route:

Although primary research has indicated that the West Coast needs one major event for all parties to tap into. The recommendation is to rather develop:

Two Event Routes (group packages) during Aug-Oct (flower season): a Northern Events Route package starting in Bitterfontein (with donkey cart rides), Lutzville, Vredendal, VanRhynsdorp, Klaver, Clanwilliam, Lambertsbaai... and travelling south with small authentic cultural events hosted along the route in each town, and culminating in Clanwilliam/ Citrusdal. At the same time a Southern Events Route package starts in Malmesburg (with side-cultural event route packages to Darling, Hopefield, Saldanah,



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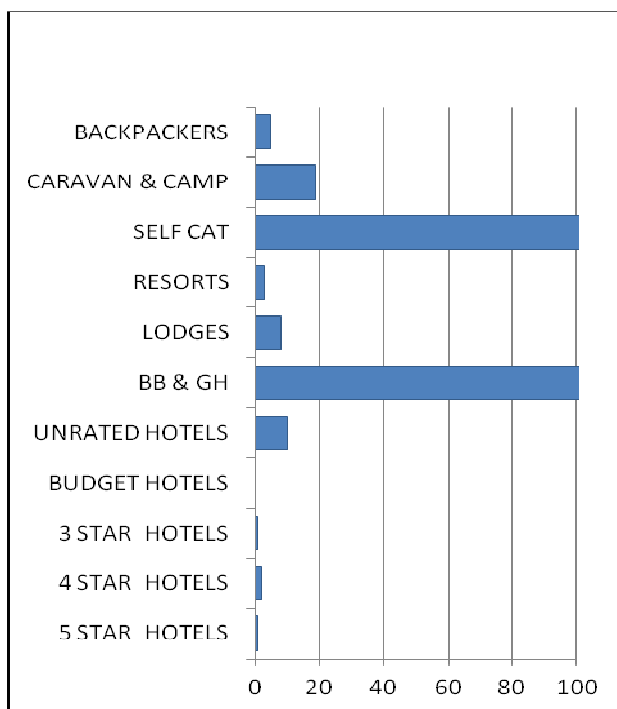
Paternoster, Velddrif) /Riebeeck Kasteel/Piketberg, travelling north and culminating in Citrusdal/Clanwilliam, where one major event is hosted during the last week of September (to coincide with school holidays for all provinces).



ACCOMMODATION IN THE WEST COAST

There is a variety of accommodation establishments with an oversupply of self-catering units. The accommodation is fairly accessible and most bookings are done online. There are establishments with adequate activities which enhance social interaction.

Figure 16: Accommodation in West Coast



Source: Safarinow (2012)

SBE(✓✓)

Spontaneous budget explorers prefer the following types of accommodation establishments: bed and breakfasts; guest houses; budget hotels; self-catering units; backpackers; hostels and camping. Affordability, easy booking procedures and flexible



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accommodation programs are important for this market segment. They enjoy on-site adventure activities, to have fun with friends and to meet new people.

The accommodation is suitable for the SBEs. There are adequate adventure activities close to accommodation establishments that increase social interaction among young people. The West Coast is a coastal region within driving distance from Cape Town and Stellenbosch where they can do shopping and experience night life.

NHF(✓✓)

New horizon families prefer the following types of accommodation establishments: bed and breakfasts; guest houses; 3 star and budget hotels and self-catering units. Affordability, accessible locations and child-friendly accommodation are important for this market segment. They favour natural places where they can partake in relaxing family activities and educate their children.

There are adequate accommodation for the NHFs and enough activities in close proximity of the accommodation establishments. Accommodation is affordable and highly accessible. The activities cater for children and adults and promote relaxation.

HLE(*✓)

High life enthusiasts prefer the following types of accommodation establishments: 4 and 5 star hotels, lodges and self-catering units. High quality products, easy booking procedures and all-inclusive packages are important for this market segment. They enjoy home-grown accommodation establishments close to urban areas with a variety of activities and unusual tourist experiences.

There is inadequate accommodation supply for the HLEs, except for the abundance of self-catering units. The area will not match their expectation of high quality products that can enhance their social status. The accommodation facilities are highly promoted on the internet and offer a variety of products. The area is not urbanized with limited access to vibrant night activities and shopping areas.

SLS(✓✓)

Seasoned leisure seekers prefer the following types of accommodation establishments: 3, 4 and 5 star hotels, lodges, bed and breakfasts; guest houses and self-catering units. Value for money, special interest offerings and unique destinations are important for this



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market segment. They prefer accommodation establishments in natural areas that offer local cuisine and low-impact activities.

The area offers a sufficient number of bed & breakfasts, guest houses and self-catering units for SLSs. The West Coast offers value for money and local food experiences that are important for SLSs. The area is a nature based destination with scenic beauty which makes it very attractive for this market segment.

WMF(*✓)

Well to-do-mzansi families prefer the following types of accommodation establishments: 3, 4 and 5 star hotels, lodges, bed and breakfasts; guest houses and self-catering units. High quality products, child-friendly accommodation and all-inclusive packages are important for this market segment. They enjoy exclusive accommodation establishments in natural areas with a variety of family activities to educate their children.

The West Coast does not cater for the needs of the WMFs. There are limited 4 and 5 star hotels and lodges. There are not inclusive rates or special offers on flights and accommodation to this area.

GAPS IN THE ACCOMMODATION OFFERING

In the West Coast region you have an abundance of accommodation establishments ranging from 5 star units to backpackers. This vast product offering can make provision for a wide target audience however, the 3, 4 and 5 star establishments are in the minority, placing a limitation on the type of market segment that can be accommodated. A lack of unity and a common vision amongst operators has a major impact on the occupancy levels in the region. Package tours and inclusive rates are well established amongst the accommodation establishments in the region, but a lack co-operation between stakeholders exists.

Despite the fact that a large proportion of your accommodation establishments do have activities on site or close to their establishments, it is not exploited to foster great social interaction.



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RECOMMENDATIONS FOR THE ACCOMMODATION OFFERING

This region needs more 4 and 5 star accommodation establishment to attract more of the high-end market, e.g. the High life enthusiasts and Well to do Mzansi families. Improve the number of backpacker establishments, especially close to attractions and venues for regional or local events. Although accommodation establishments in the area are perceived to provide value for money, more care should be given to improving service levels and customer satisfaction.



TRANSPORT TO THE WEST COAST

Air access adequate to Cape Town but must link with other modes to reach region.

Although some airstrips are available it seems as though there is a general lack of information on potential to bring in tourists and larger aircraft cannot access airstrips.

Car most effective mode of transport.

Rental car, some problems i.e. lack of car rental offices in region.

Minibus – lack of information, booking facilities and promotional activities on mode as tourist transport and generator.

Intercity busses – most believe this is a vital mode for development but cite various problems such as certain towns not served by this mode. Promotion in area not done for tourist purposes on this mode.

Tour coaches – overwhelming support for more of this mode to increase tourist numbers especially for smaller groups. Seasonality may influence use while certain areas are inaccessible. Clearly a lack of information and promotion.

Rail – most of the towns in the area are not linked to the main rail system – not enough information and promotion.

General road conditions classified as good.

SBE(✓✓)

They drive to the destination but for further destinations they may take a bus or fly on a low cost carrier. Part of the holiday is the journey. Socialising, adventure, fun. Affordability.



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Roads are in good condition. LCCs available to Cape Town, good links to car rental. Some gaps in car rental offices not in all towns (not really needed by this segment). Minibuses not utilised as tourist mode of transport, should be developed. Private car suitable for small group travel. Intercity busses are available although not all towns in the region are being served.

NHF (✓✓)

Drive or take a bus to their destination. Educate their children. Affordability, accessibility by road.

Road conditions good thus access to region suitable and travel mainly by private vehicle for accessibility to educational activities, thus the private vehicle is ideal for families.

Intercity buses would be important for this market but does need some further promotion and link to rental cars.

HLE (✓✗)

Singles - Boost status, finer things in life –drive to destinations close by and fly to destination further afield, likely to hire a car if they fly somewhere but aren't impressed having to drive a car that is less luxurious than what they drive at home.

Can fly to Cape Town and link to region via car rental but region does not suit profile.

SLS (✓✓)

Married, generally no kids, escape and relaxation. Drive close by, fly further afield.

SLS falls within current market profile, will fly to Cape Town and rent a car or self-drive and seek escape.

WMF (✓✓)

Drive or fly depending on how close the destination is. Educate their children.

They will self-drive with family (kids), have money so can travel to remote areas with 4x4 and discover new places.



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GAPS IN THE CURRENT TRANSPORT OFFERING

Although some airstrips are available it seems as though there is a general lack of information on potential to bring in tourists and larger aircraft cannot access airstrips.

Rental car, some problems i.e. lack of car rental offices in region.

Minibus – lack of information, booking facilities and promotional activities on mode as tourist transport and generator.

Intercity busses – most believe this is a vital mode for development but cite various problems such as certain towns not served by this mode. Promotion in area not done for tourist purposes on this mode.

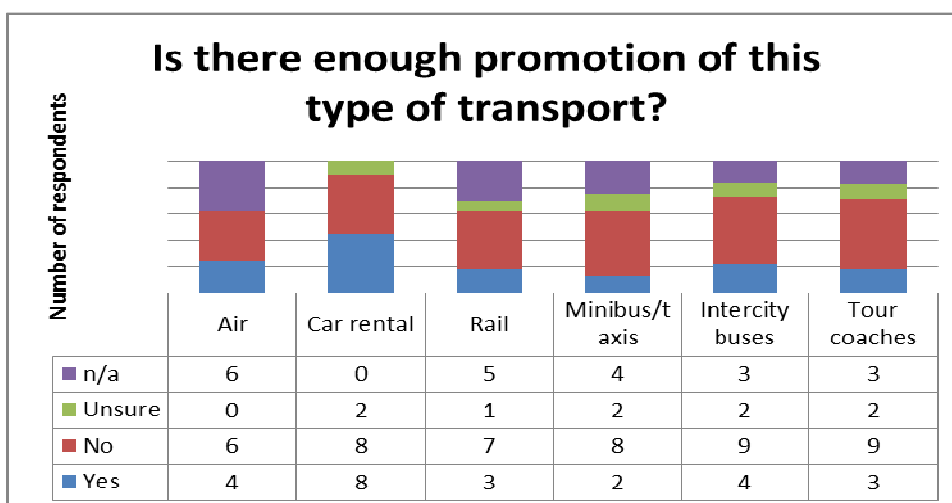
Tour coaches – overwhelming support for more of this mode to increase tourist numbers especially for smaller groups. Seasonality may influence use while certain areas are inaccessible. Clearly a lack of information and promotion.

Rail – most of the towns in the area are not linked to the main rail system – not enough information and promotion.

TOURISTS FINDING INFORMATION ABOUT TRANSPORT

The transport modes lacking most in terms of information on the mode and promotion thereof seem to be rail, minibus taxis, intercity buses and tour coaches.

Figure 17: Effectiveness of promotion for transport in the West Coast







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OVERALL RECOMMENDATIONS

Air access to this region could improve with utilisation of the local airstrips which should be considered for smaller groups. Minibuses should be developed as a mode for tourists to and within the region. Consideration should be given to better accessibility to the region via intercity buses which could stop in more towns. One idea would be to have a “hop-on – Hop-off” bus facility at special rates for this region as the number of towns and activities could generate more tourists this way.

TOURS TO AND WITHIN THE WEST COAST

 Group tours (to the region)	 Local tours (within the region)
<p>Although there are different views, the majority of respondents feel that group tours make up less than 20% of visitors to the region.</p> <p>Currently scheduled group tours to the region are insufficient for supply, although during high season e.g. flowers more tours are available. Accommodation for groups in season in some areas is insufficient. With the recommendation to split groups across accommodation establishments. Information on tours not always adequate. Much more promotion of/by small tour operators needed. Opinions of affordability of tours divided. Attractions accessible and roads good.</p>	<p>Many local tours available (perhaps an oversupply according to some respondents)</p> <p>Travel information Centres appear to be most effective in promoting local tours.</p> <p>Opinions divided on promotion on regional websites. Booking facilities could improve for local tours. Traditional media (e.g. radio, TV, billboards newspapers) not used/effective at all in promoting local tours.</p> <p>Opinions divided on effectiveness of tour operators in promoting local tours.</p> <p>Tour guides are not always available.</p>
<p>SBE (x✓)</p> <p><i>Ideal packages for SBEs should sell 'fun with friends' e.g. driving trip promotions,</i></p>	<p>SBE (✓✓)</p> <p><i>Activity-driven day trips</i></p> <p>Many local activities available but not well</p>



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<p><i>road trip (tour of SA on a bus for two weeks with other young South Africans. Packages provide SBEs with the opportunity to visit multiple destinations without too much organisational hassle while enabling them to pay most of the costs upfront. Overland safaris are ideal.</i></p> <p>Few group tours available.</p> <p>Accommodation for large groups must be split, affects socialisation.</p> <p>Region has potential for exploring and many adventure activities are available but not utilised yet for this market.</p>	<p>promoted or known.</p>
<p>NHF (x✓)</p> <p><i>Products that centre around learning new things and spending time with family. Child-friendly holiday packages and educational trips. Will take a bus to destination, affordable product, culture, heritage and nature.</i></p> <p>Limited group and packaged tours available.</p>	<p>NHF (✓✓)</p> <p><i>Heritage activities. Day trips that have an educational element would be ideal.</i></p> <p>Plenty of educational activities available.</p>
<p>HLE (x x)</p> <p><i>Want glamour and comfort from their holidays</i></p> <p>Not a market for group tours and packages.</p>	<p>HLE (x x)</p> <p><i>Have the option for numerous activities but allow the consumer to choose to do activities as and when they please.</i></p> <p>Many local activities but may not meet profile of this group in terms of glamour.</p>
<p>SLS (x x)</p> <p><i>Enjoys special interest activities and hobbies. Incorporate something different and memorable such as beautiful scenery and local culture. Special interest events (flowers) do exist in the region but</i></p>	<p>SLS (✓✓)</p> <p><i>Enjoys different activities and new experiences</i></p> <p>Many activities available.</p>



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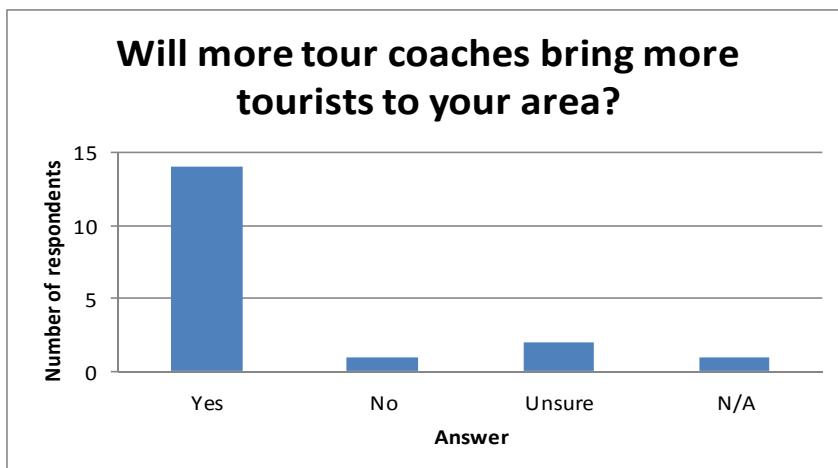
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Seasoned Leisure Seekers are not known as regular group tour enthusiasts.	
<p>WMF (xx)</p> <p><i>Products that are comfortable and hassle-free with a variety and abundance of activities and entertainment such as all-inclusive premium packages and family safaris. Large group tours not suitable, individual-type packages more effective.</i></p> <p>Supply currently in “organised” format for this segment limited.</p>	<p>WMF(✓✓)</p> <p><i>Like variety and educational activities for children.</i></p> <p>Lots of activities that meet these requirements.</p>

GAPS IN THE CURRENT PACKAGES OFFERING

The overwhelming majority of respondents felt that more tour coaches to the area, could be beneficial in attracting larger tourist numbers (see figure). Currently scheduled group tours to the region are insufficient for supply. Accommodation for groups in season in some areas is insufficient. Much more promotion of/by small tour operators needed.

Figure 18: Tour coaches in the West Coast





TOURISTS FINDING INFORMATION ABOUT PACKAGES ON OFFER

Travel information Centres appear to be most effective in promoting local tours. Opinions divided on promotion on regional websites. Booking facilities could improve for local tours. Traditional media (e.g. radio, TV, billboards newspapers) not used/effective at all in promoting local tours. Opinions divided on effectiveness of tour operators in promoting local tours.

RECOMMENDATIONS

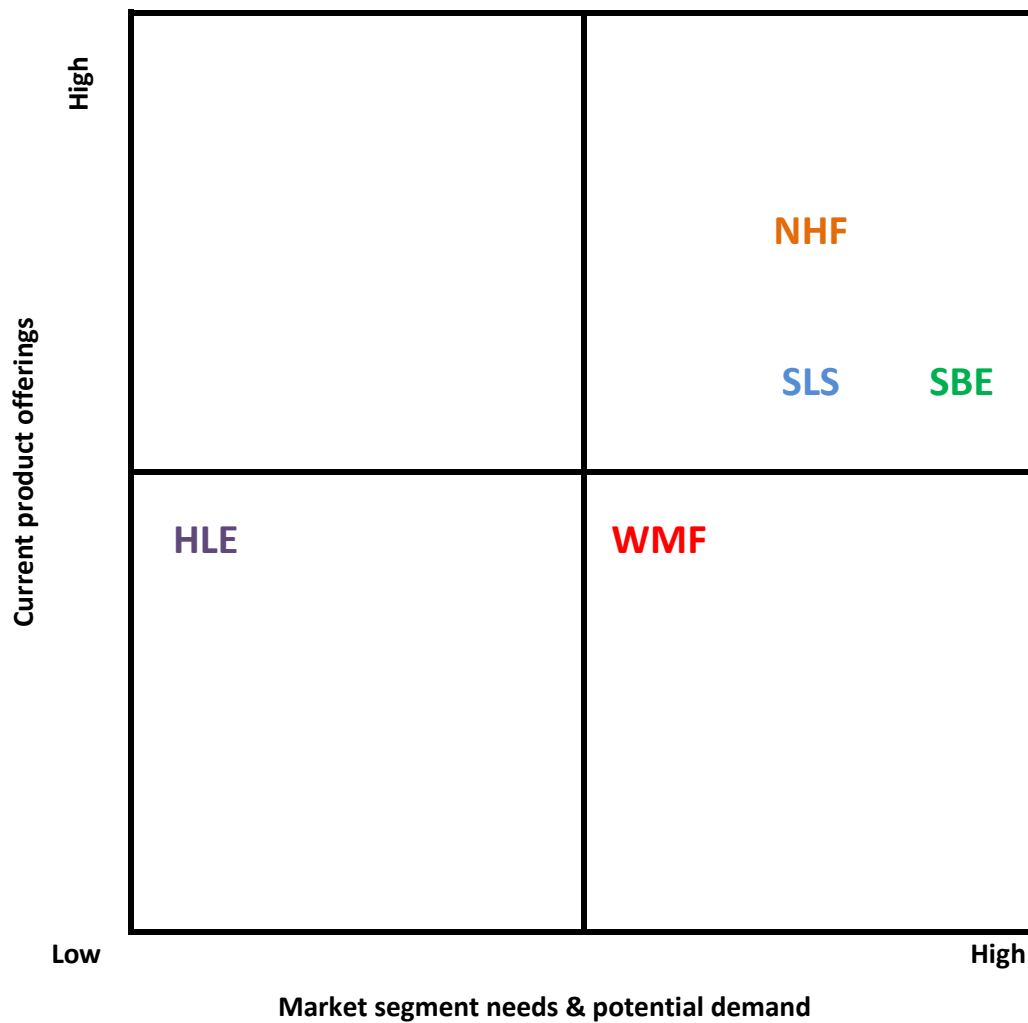
This region is well situated for increased group tours and packages due to its proximity to Cape Town and should focus on the variety of the region as a whole and not only on special events such as the flowers. The region has much variety which should be better promoted and coordinated. There appears to be many problems related to coordination between the various role-players in the tourism industry.

There are many local activities and tours available but respondents agree that more information on these is needed and promotion is insufficient. There might be a risk of over-supply of local operators which needs to be better managed.



6.4.3 BUSHBUCKRIDGE

Current product offerings in terms of market segment needs and potential demand





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GENERAL PROFILE OF TOURISTS TO BUSHBUCK RIDGE

According to the respondents (totalling 8) the tourist profile of Bushbuckridge can be described as follows:

Figure 19: Visitor age profile: Bushbuckridge

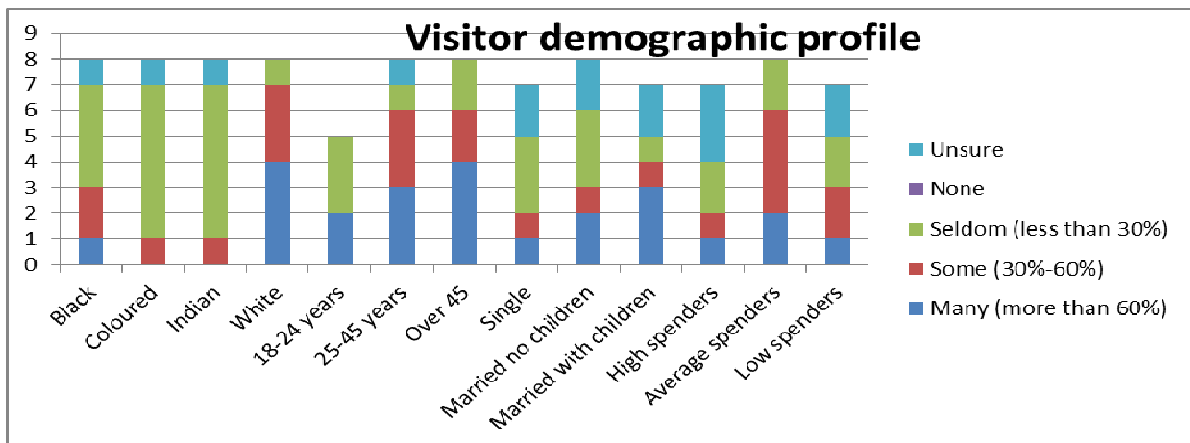
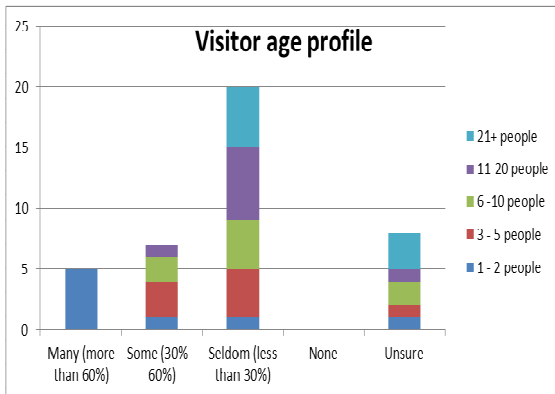
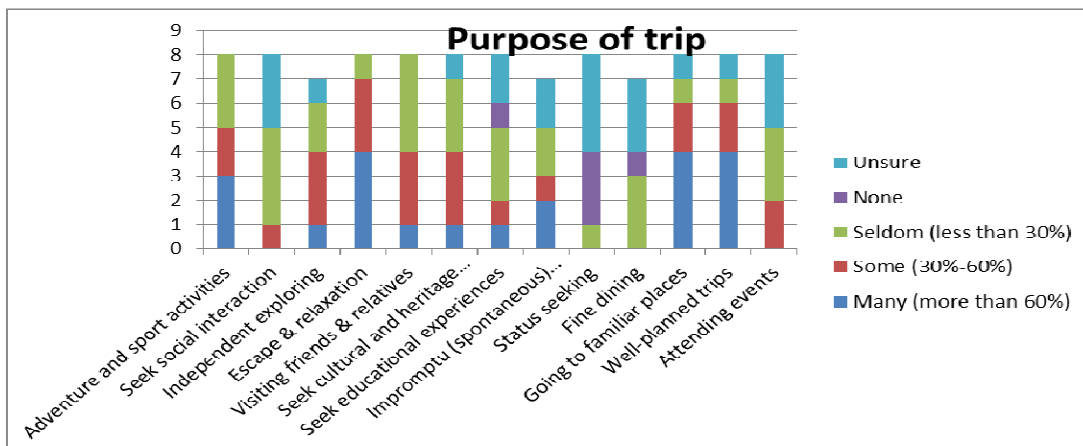


Figure 20: Visitor demographic profile: Bushbuckridge

Figure 21: Purpose of trip: visitors to Bushbuckridge





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The majority of tourists are white over the age of 25.

A substantial number are under 45.

Most tourists are classified as average-spenders.

Currently blacks do sometimes visit the area.

Indians and coloureds seldom visit the area.

Tourists to the region generally visit for escape and relaxation and going to familiar places.

Travel as part of well-planned trips.

Tourists to the region mostly travel in groups of five or less, with most in groups of less than three. Groups of six and more sometimes visit the region.

High seasonal months are regarded as April and December.

Mid-season is September.

The majority of visitors are from Gauteng followed by visitors from Mpumalanga.



ATTRACTIONS IN BUSHBUCK RIDGE

Natural attractions

Although most attractions (natural) have easy access in terms of location, some attractions have limited access such as Bourke's Luck Potholes, God's Window and mountainous sites.

The quality and character of natural attractions are perceived as authentic and value for money. Criteria such as educational, well-managed also feature quite prominently while customer service and innovation at natural sites can be improved.

Family togetherness is the most noteworthy experience at a natural attraction, followed by escape/relaxation and excitement/adventure. The attractions appear to be lacking in terms of status, socialisation and nostalgia.

Man-made attractions

Man-made attractions are generally most accessible in terms of location, are well-managed and safe, have good quality facilities, are included in group tour packages and are reasonably accessible for the disabled.

The quality and character of man-made attractions are mostly viewed as interactive, with reasonable customer service, novelty and authenticity. Man-made attractions need to



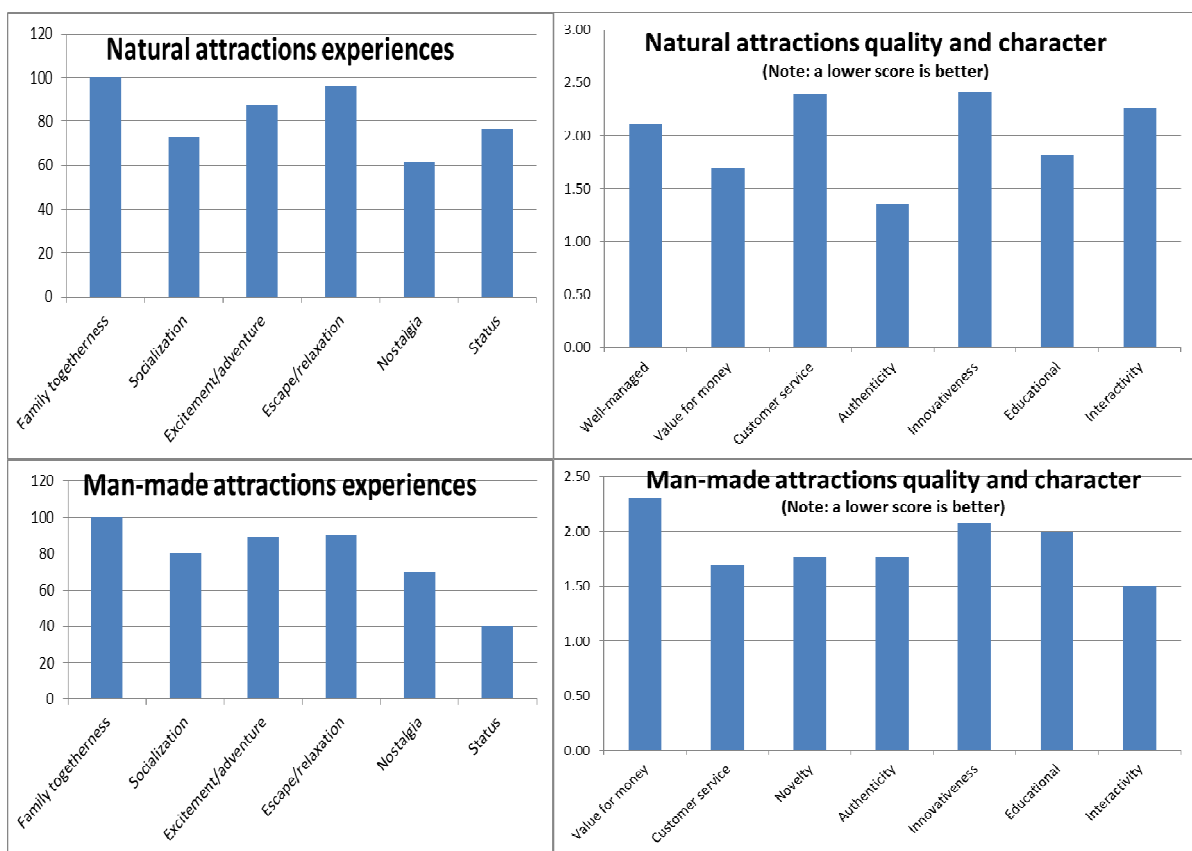
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address value for money and need to be more innovative and educational (for the children's market).

Similar to natural attractions, the most important experience at man-made attractions is also family togetherness, followed by escape/relaxation, excitement/adventure. Nostalgia is rated not that important, and status as the least relevant experience on offer.

Figure 22: Suitability for the five domestic target market segments: Bushbuckridge



SBE (✓✓)

Enjoy multiple destinations and different surroundings. They seek a variety of unusual activities involving socialising with friends, adventure and fun. Shopping and nightlife is also important. They seek value for money.

Overall, this region is suitable for this market in terms of both natural and man-made attractions. Some of the man-made attractions do not offer enough opportunities for socialization and variety of attractions for this market. Shopping experiences are also inadequate.



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NHF (✓✓)

This market enjoys accessible natural places with child-friendly facilities. They want to relax and spend quality time with family and friends. Education and entertainment is of paramount importance, as they want to broaden their children's horizons in terms of cultural and heritage activities.

Demand meets supply in most instances.

HLE (x x)

Singles that pursue the finer things in life. They enjoy must-go or must-see destination of high quality, with exclusive products to boost their social status. They like a variety of traditional South African, but unusual experiences. Socialising with friends is paramount. The natural attractions offer the desired status. However man-made attractions are insufficient in terms of unique and sophisticated experiences that are not being offered. Extensive product development in terms of man-made attractions (e.g. casino, spas) is required.

SLS(✓✓)

Married, generally no kids, escape and relaxation. Seek products with unique scenery, cuisine. This market seeks a reason to visit a destination i.e. a festival. They pursue special interest activities and hobbies of low impact. Socialising and relaxing with friends and sharing nostalgic moments are important to this market

Demand meets supply in all instances.

WMF(x✓)

Travel with children to new scenic destinations of high quality and comfort. This market enjoys hassle-free, quality time with friends and family. They seek entertainment with little 'surprises' and have the desire to expose their children to experiences they were not fortunate enough to have had.

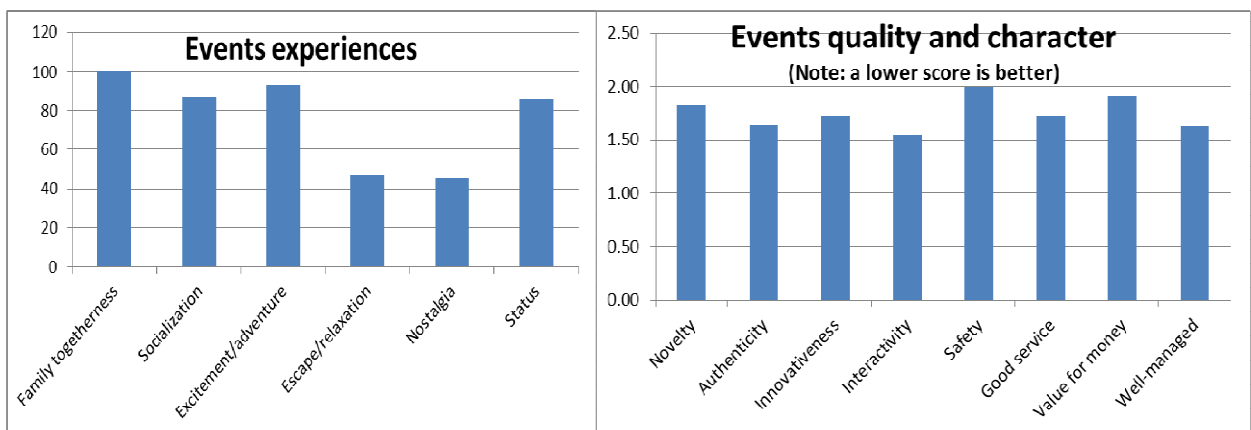
Natural attractions are suited but need to be improved in terms of management and interactivity for children. Man-made attractions need to be developed to offer more relaxing and comfortable environs for these families. Family friendly edutainment needs to be developed at existing attractions, but new attractions could also be developed.



EVENTS AND ACTIVITIES IN BUSHBUCK RIDGE

Most events are not included in group packages. Only four sports events (Sabie Classic, Sabie Experience, Sasol Rally and Long Tom Marathon) are included in group packages. The events are regarded as interactive, based on the fact that they are mostly sports events (cycling). They are not regarded as value for money or novel, however this may be debated when considering the scenic locations. They offer opportunities for family togetherness and most definitely excitement and adventure. They offer a certain element of status as some of the cycling events are highly rated on the cycling calendar. They are not fit for all members of the family and are focused on specific physical activities (predominantly cycling) and therefore are not regarded as relaxing. Mountain biking is the most noteworthy sporting activity, followed by canopy tours, fishing, golfing, hiking and quad biking - all based on the rich natural resources of the area. There are also several other popular activities such as abseiling, angling, ballooning, bridge swings, horse riding and river rafting. Activities that do not feature at all are bungee jumping, hunting, skydiving and sailing.

Figure 23: Suitability for the five domestic target market segments: Bushbuckridge



SBE (x✓)

Enjoy multiple destinations and different surroundings. They seek a variety of unusual activities involving socialising with friends, adventure and fun. Shopping and nightlife is also important. They seek value for money.



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The variety of events is too limited in terms of the focus on sport. This market requires more lifestyle and cultural events where they can socialise and enjoy an active nightlife.

NHF (✓✕)

This market enjoys accessible natural places with child-friendly facilities. They want to relax and spend quality time with family and friends. Education and entertainment is of paramount importance, as they want to broaden their children's horizons in terms of cultural and heritage activities.

There are sufficient events and activities available for this market as they can offer the desired experiences – especially if promoted more actively to this market. The sports events can ideally fit this market's desires for family time and entertainment, if family sport days are included i.e. the Sabie Experience where family entertainment can be promoted on the camping grounds.

HLE (✓✕)

Singles that pursue the finer things in life. They enjoy must-go or must-see destination of high quality, with exclusive products to boost their social status. They like a variety of traditional South African, but unusual experiences. Socialising with friends is paramount.

It is an untapped market as cycling is a growing sport and has a lot of status (e.g. The Sasol Rally, Sabie Extreme, Sabie Shufflers Forest Run). Fitting in with this market's desire to boost their status through lifestyle events.

SLS (✕✓)

Married, generally no kids, escape and relaxation. Seek products with unique scenery, cuisine. This market seeks a reason to visit a destination i.e. a festival. They pursue special interest activities and hobbies of low impact. Socialising and relaxing with friends and sharing nostalgic moments are important to this market

Demand meets supply in some instances, but can be developed in terms of cultural and arts festivals, as well as special interest activities (e.g. flyfishing, birding, photography).

WMF (✕✕)

Travel with children to new scenic destinations of high quality and comfort. This market enjoys hassle-free, quality time with friends and family. They seek entertainment with little



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'surprises' and have the desire to expose their children to experiences they were not fortunate enough to have had.

There are no satisfactory events or activities for this market that focus on comfort and child-friendly facilities. The events should preferably be offered at inclusive resorts or included into packages with accommodation.

GAPS IN THE CURRENT ATTRACTIONS OFFERING

There is a lack of activities and innovative experiences. Opportunities need to be identified as well as the development, training and mentoring of individuals into the industry are needed. In general, management can be improved.

The area struggles to entertain very young children and elderly retired people.

There is a major gap in man-made attractions. The area boasts numerous natural attractions which are the main draw cards for both international and domestic tourists but there is a need for more man-made attractions in order to increase length of stay and visitor spend.

GAPS IN CURRENT EVENTS OFFERING

More cultural and sporting activities are needed (different sporting codes) as there is not enough variety in the events portfolio.

Activities for young children and elderly retired people are needed.

Some of the events are not well promoted.

POTENTIAL TOURISTS FINDING INFORMATION ABOUT THE ATTRACTIONS & EVENTS ON OFFER

There is a serious lack of co-ordinated marketing efforts between the RTO, provincial government and local government, with the private sector doing more than before. There is a lot of information on the Internet and Information Centres help with information to people both locally and internationally.

It is easy to find information from local people, especially about events because they know about them.



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TOURISTS IN THE AREA FINDING INFORMATION ABOUT THE ATTRACTIONS & EVENTS ON OFFER

There are two information centres and all tourism operators work as a network spreading information on other locations.

It is easy to find information because people know about the events and activities and are proud to tell their story.

Accommodation staff is trained to advise guests on what attractions are available in the area

RECOMMENDATIONS FOR BBR IN TERMS OF ATTRACTIONS, EVENTS AND ACTIVITIES

Sufficient world class natural attractions are available in the node for all market segments although management could be addressed. Man-made attractions are underdeveloped in terms of variety, socialisation, family togetherness and edutainment and the expansion of facilities at existing man-made attractions are recommended; or the development of a new high-end inclusive resort (with facilities such as e.g. a spa, casino, entertainment centre, putt-putt and golf course). For events and activities, sport and lifestyle events can be extended with family sport packages; cultural and arts/music festivals; and the expansion of special interest group activities (including children as a market), such as birding and photography; are recommended.

A PRACTICAL SUGGESTION

In terms of attractions and events the BBR node has a dearth of world-class natural attractions. It is recommended that a circular route be marketed including Graskop, Pilgrim's Rest, Lydenburg, Sabie, Hazyview (many natural attractions) and Bushbuckridge (town) with the development of a music/cultural event (during the April and September school holidays, as Innibos is in Jun/July) at the Inyaka dam (adjacent to BBR town) – a satellite 'Innibos' called 'Ommidam', with low- and high-end accommodation development recommended in the proximity of BBR for most market segments.



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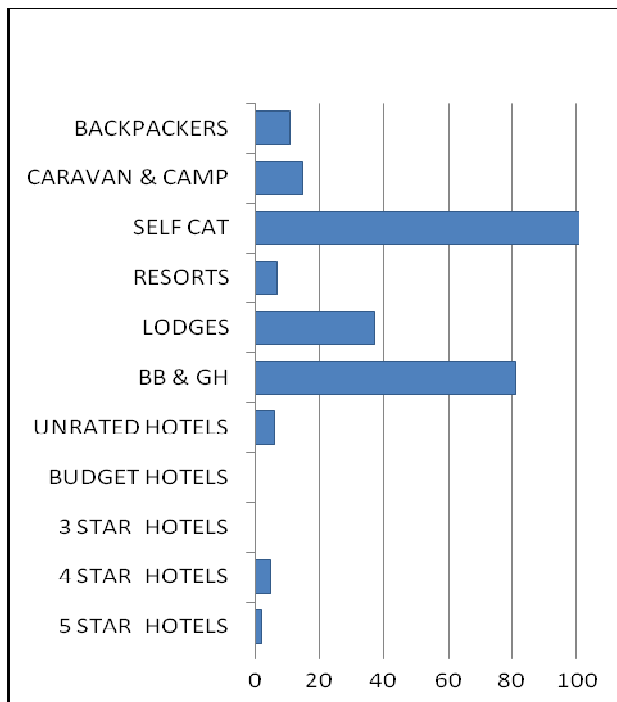
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ACCOMMODATION IN BUSHBUCKRIDGE

There are a significant number of accommodation establishments in this tourism node, with self-catering units, bed & breakfasts, guest houses and lodges as the major suppliers. The town Bushbuck Ridge itself doesn't offer accommodation, but neighbouring towns like Hazyview and Graskop offer a variety of accommodation establishments. Accommodation establishments in Hazyview, Graskop, Sabie and Lydenburg are very accessible and have a web presence. They offer Inclusive rates and there are adequate activities in the area.

Figure 24: Accommodation in Bushbuck Ridge



Source: Safarinow (2012)

SBE(✓✓)

Spontaneous budget explorers prefer the following types of accommodation establishments: bed and breakfasts; guest houses; budget hotels; self-catering units; backpackers; hostels and camping. Affordability, easy booking procedures and flexible accommodation programs are important for this market segment. They enjoy on-site adventure activities, to have fun with friends and to meet new people.



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The accommodation that is available in Bushbuck Ridge's surrounding towns suits the profile of the SBEs. There are backpackers in the node that offer reasonable rates. Lower entrance accommodation is in general very affordable and provides a variety of activities which enhance social interaction.

NHF(✓✓)

New horizon families prefer the following types of accommodation establishments: bed and breakfasts; guest houses; 3 star and budget hotels and self-catering units. Affordability, accessible locations and child-friendly accommodation are important for this market segment. They favour natural places where they can partake in relaxing family activities and educate their children.

There are sufficient accommodation establishments that suit the needs of the NHFs. It is affordable, accessible and offers a variety of activities for children. There are a lot of cultural and natural attractions in the area that will meet the educational needs of this market.

HLE(✓✓)

High life enthusiasts prefer the following types of accommodation establishments: 4 and 5 star hotels, lodges and self-catering units. High quality products, easy booking procedures and all-inclusive packages are important for this market segment. They enjoy home-grown accommodation establishments close to urban areas with a variety of activities and unusual tourist experiences.

There is a sufficient scope of accommodation establishments to satisfy the needs of the HLEs. There is a variety of lodges with good quality products and inclusive rates for package tours. The surrounding areas Bushbuck Ridge are some of the 'must-go' areas in South Africa and offer home-grown attractions such as Pilgrims Rest and cultural villages.

SLS(✓✓)

Seasoned leisure seekers prefer the following types of accommodation establishments: 3, 4 and 5 star hotels, lodges, bed and breakfasts; guest houses and self-catering units. Value for money, special interest offerings and unique destinations are important for this market segment. They prefer accommodation establishments in natural areas that offer local cuisine and low-impact activities.



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There is adequate accommodation to fulfil the needs of SLSs. Accommodation establishments provide value for money and a variety of low-impact activities. The scenic routes of Bushbuckridge motivate tourists to explore more of the surrounding areas. It is the ideal destination to relax and escape from everyday life and to partake in special interest activities.

WMF(✓✓)

Well to-do-mzansi families prefer the following types of accommodation establishments: 3, 4 and 5 star hotels, lodges, bed and breakfasts; guest houses and self-catering units. High quality products, child-friendly accommodation and all-inclusive packages are important for this market segment. They enjoy exclusive accommodation establishments in natural areas with a variety of family activities to educate their children.

The tourism node fulfils the needs of the WMFs. There are suitable 4 and 5 star establishments with high quality facilities such as day spa's and golf courses. Some lodges, hotels and resorts offer inclusive rates and entertainment programmes for children. Bushbuckridge is situated in a remote area which is preferable for WMFs who try to avoid urban areas when they go on holiday.

GAPS IN THE CURRENT ACCOMMODATION OFFERING

Although there are large number of accommodation establishments in the region, attention should be given to 5 star and 3 star establishments. A limited number of accommodation establishments with activities or close to activities or adventure sites exist and therefore limited social interaction is enhanced. The perceived value for money offerings in the region is moderate, service levels and quality of products not up to standard. There is also a lack of co-ordinated marketing in the region.

RECOMMENDATIONS

The number of backpacker establishments can be increased due to the adventure type of products available in the region. The region needs to promote its current accommodation offerings and establish a platform for co-ordinated marketing. Some of the establishments need to add or increase activities on site to promote social interaction. Promote package



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tours and inclusive rates in the region.



TRANSPORT TO BUSHBUCKRIDGE

Air access restricted due to lack of airport – closest is Kruger Mpumalanga International Airport. Limited number of airlines and flights to the area.

Currently car is the most effective mode of transport.

No problems with car rental because this node is within driving distance of its main source market.

Minibus – limited problems with this mode, could potentially be developed as a tourist generator.

Intercity buses could also be seen as a potential tourist generator since relatively few problems are experienced with this mode and towns seem to be linked on bus network.

Tour coaches also overwhelming support for more of this mode to increase tourist numbers but the demise of certain towns in the node such as Pilgrims Rest led to a decrease in tour coaches to the area.

Rail service network inadequate for area and thus no information available.

SBE (✓✓)

They drive to the destination but for further destinations they may take a bus or fly on a low cost carrier.

LCCs not available to the node, but since the source markets are within driving distance of the node, private car and rental cars seem to be the ideal modes.

Limitation of private vehicle – individual travel (1-2 people) thus lack of social interactivity on transport mode en route (possible with Minibuses).

Since relatively few problems are experienced with intercity buses in the node, this could also be a possible mode to consider for this segment, since it will satisfy the need for social interactivity. What is more, towns in the node seem to be connected to main bus network.

NHF (✓✓)

Drive or take a bus to their destination.

Private vehicle ideal for families. Intercity busses available



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HLE (✓✗)

Singles - Boost status, finer things in life –drive to destinations close by and fly to destination further afield, likely to hire a car if they fly somewhere but aren't impressed having to drive a car that is less luxurious than what they drive at home.

Since this node is within driving distance of its source markets, the HLE could use their own private luxurious car to access the node. If need be, this segment could also fly to the node, and rent a car, since car rental facilities are freely available within the region. The profile of the potential market does not match well currently but there is potential for development.

SLS (✓✓)

*Married, generally no kids, escape and relaxation
Drive close by, fly further afield.*

Since this node is within driving distance of its source markets, the HLE could use their own private car to access the node. If need be, this segment could also fly to the node, and rent a car, since car rental facilities are freely available within the region.

WMF (✓✓)

Drive or fly depending on how close the destination is. Educate their children

Since this node is within driving distance of its source markets, the HLE could use their own private car to access the node. If need be, this segment could also fly to the node, and rent a car, since car rental facilities are freely available within the region. Educational sites accessible by private vehicle

GAPS IN THE CURRENT TRANSPORT OFFERING

Air access restricted due to lack of airport – closest is Kruger Mpumalanga International Airport. Limited number of airlines and flights to the area. Tour coaches also overwhelming support for more of this mode to increase tourist numbers but the demise of certain towns in the node such as Pilgrims Rest led to a decrease in tour coaches to the area. Rail service network inadequate for area and thus no information available.

There are relatively few gaps in the transport offering in Bushbuckridge.





TOURISTS FINDING INFORMATION ABOUT TRANSPORT

For certain modes of transport, information and promotion seem to be sufficient, for example car rental. For others such as air, rail, minibuses and intercity buses there appear to be a general lack of information and promotion available.

RECOMMENDATIONS

Minibuses are well-suited for development for tourist transport to and within the region.

TOURS TO AND WITHIN BUSHBUCKRIDGE

 Group tours (to the region)	 Local tours (within the region)
<p>It seems that a fair number of visitors are on organised group tours (between 25 – 40%). Respondents believe more organised groups can be accommodated to this region. Some problems with accommodation for groups in season in some areas. Accessibility of attractions is good and roads generally perceived as good but some roads have potholes which may cause problems and be a deterrent. Information on tours not always adequate. Promotion can be improved. New products need to be developed. Tours generally seem affordable. Incoming tour operators deemed professional.</p>	<p>There appears to be enough local tours available, although some respondents suggested further development in the BBR region. Ordinary taxis sometimes used for local tours. Travel information Centre (Hazyview) quite effective with promotion. BBR has a TIC but only “bodies on handing-over day to local community”. Accommodation establishments appear to be most effective in promoting local tours. Promotion on regional websites generally felt to be effective. Booking facilities quite easy for local tours. Traditional media (eg radio, TV, billboards newspapers) not used/effective at all in promoting local tours. Tour operators seem to be quite effective in promoting local tours.</p>



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<p>SBE (x✓)</p> <p><i>Ideal packages for SBEs should sell 'fun with friends' e.g. driving trip promotions, road trip (tour of SA on a bus for two weeks with other young South Africans. Packages provide SBEs with the opportunity to visit multiple destinations without too much organisational hassle while enabling them to pay most of the costs upfront. Overland safaris are ideal.</i></p> <p>While there are a number of group tours to the region, promotion of tours seems to be the main problem. Accommodation for large groups limited.</p>	<p>SBE (✓✓)</p> <p><i>Activity-driven day trips</i></p> <p>Many local activities available with most being focused on game drives (KNP) and also a substantial number on cultural villages.</p>
<p>NHF (x✓)</p> <p><i>Products that centre around learning new things and spending time with family. Child-friendly holiday packages and educational trips. Will take a bus to destination, affordable product, culture, heritage and nature.</i></p> <p>Limited group and packaged tours for this market segment but there is a demand based on their interests.</p>	<p>NHF (✓✓)</p> <p><i>Heritage activities. Day trips that have an educational element would be ideal.</i></p> <p>Plenty of educational and heritage activities available.</p>
<p>HLE (xx)</p> <p><i>Want glamour and comfort from their holidays</i></p> <p>Not a market for group tours and packages</p>	<p>HLE (xx)</p> <p><i>Have the option for numerous activities but allow the consumer to choose to do activities as and when they please.</i></p> <p>Many local activities but may not meet profile of this group in terms of glamour</p>
<p>SLS (xx)</p>	<p>SLS (✓✓)</p>



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<p><i>Enjoys special interest activities and hobbies. Incorporate something different and memorable such as beautiful scenery and local culture.</i></p> <p>Not regular group tour enthusiasts.</p>	<p><i>Enjoys different activities and new experiences</i></p> <p>Many local activities available.</p>
<p>WMF (xx)</p> <p><i>Products that are comfortable and hassle-free with a variety and abundance of activities and entertainment such as all-inclusive premium packages and family safaris. Large group tours not suitable, individual-type packages more effective.</i></p> <p>Limited supply currently in “organised” format for this group.</p>	<p>WMF (✓✓)</p> <p><i>Like variety and educational activities for children.</i></p> <p>Lots of activities that meet these requirements.</p>

GAPS IN THE CURRENT PACKAGES OFFERING

Most respondents believed that more tour coaches to the region will increase tourists to the area. It seems that the number of tour coaches to the region has decreased due to the demise of certain towns in the node, such as Pilgrim’s Rest. The biggest problems in the area seem to be the lack of information and promotion available on packages to the area, as well as within the area (see figure). There seems to be a lack of suitable accommodation in the node for larger tour groups.

TOURISTS FINDING INFORMATION ABOUT PACKAGES ON OFFER

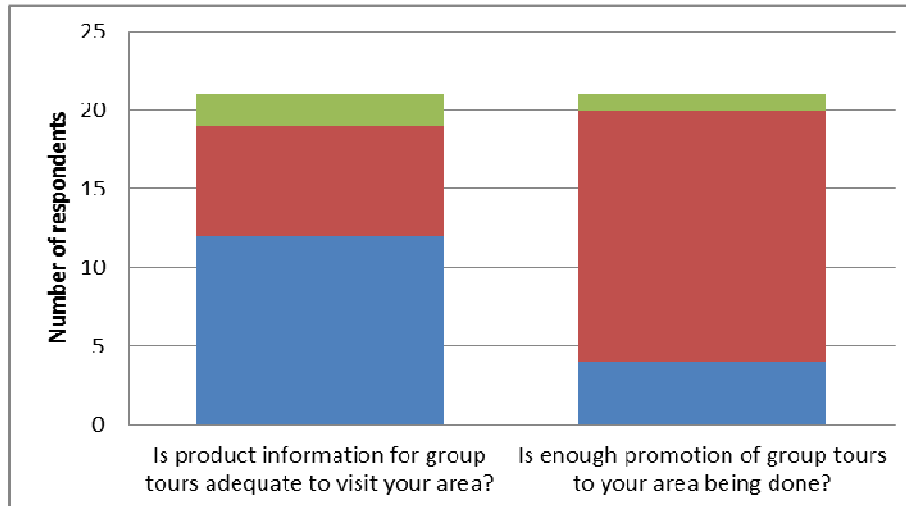
Travel information Centre (Hazyview) quite effective with promotion. BBR has a TIC but only “bodies on handing-over day to local community”. Accommodation establishments appear to be most effective in promoting local tours. Promotion on regional websites generally felt to be effective. Booking facilities quite easy for local tours. Traditional media (e.g. radio, TV, billboards newspapers) not used/effective at all in promoting local tours. Tour operators seem to be quite effective in promoting local tours.



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Figure 25: Information on tours: Bushbuckridge



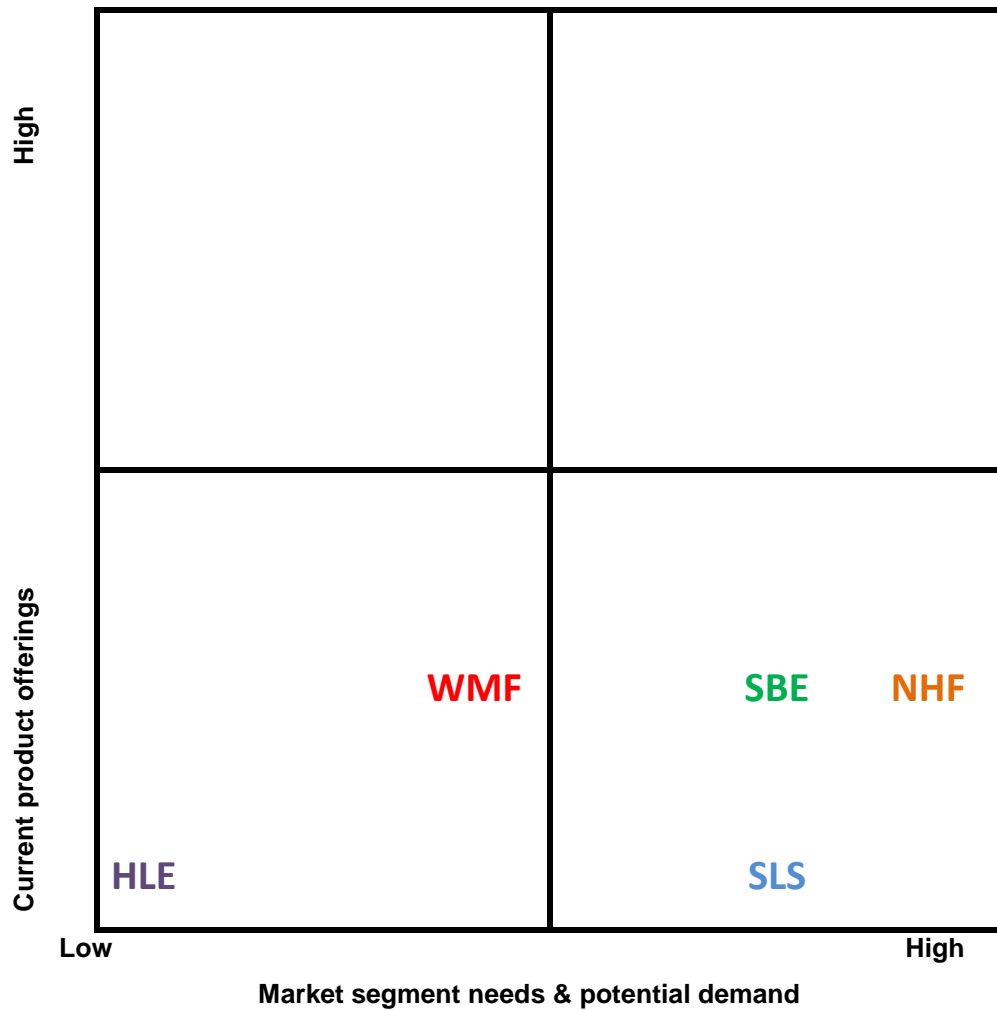
RECOMMENDATIONS

A problem is the safety issue which led to the demise of Pilgrims Rest and affected the group packaged tour industry. This problem should be addressed before promotional and information gaps are addressed.



6.4.4OR TAMBO DISTRICT

Current product offerings in terms of market segment needs and potential demand





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GENERAL PROFILE OF TOURISTS TO THE OR TAMBO DISTRICT

This area was difficult to survey – very few people responded (only 4 online) and were reluctant to have interviews. There is a lot of focus on the problems related to tourism development in the area and consensus was not achieved on views, thus the profiling of visitors must be viewed circumspectly.

Figure 26: Visitor group size: OR Tambo

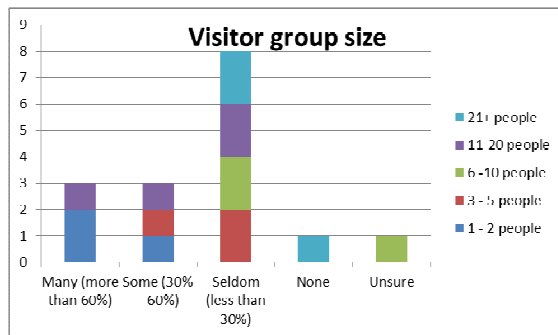


Figure 27: Visitor demographic profile: OR Tambo

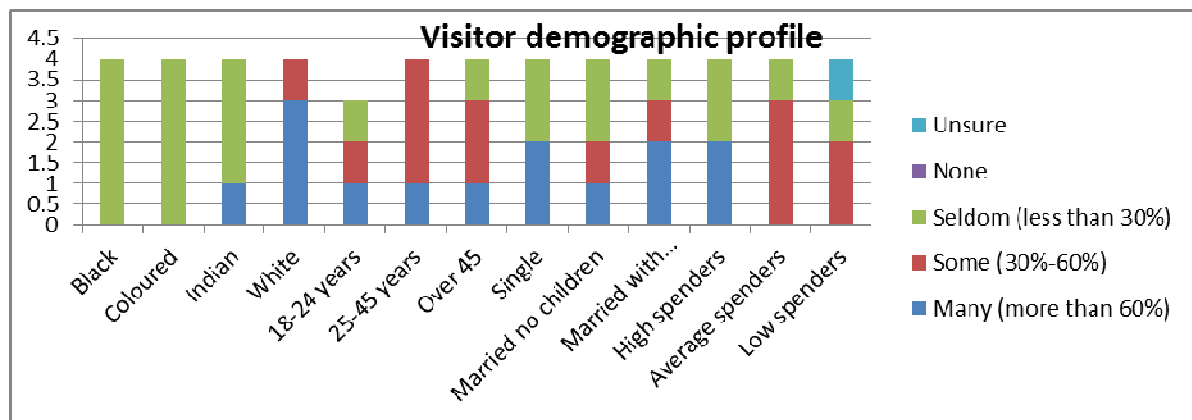
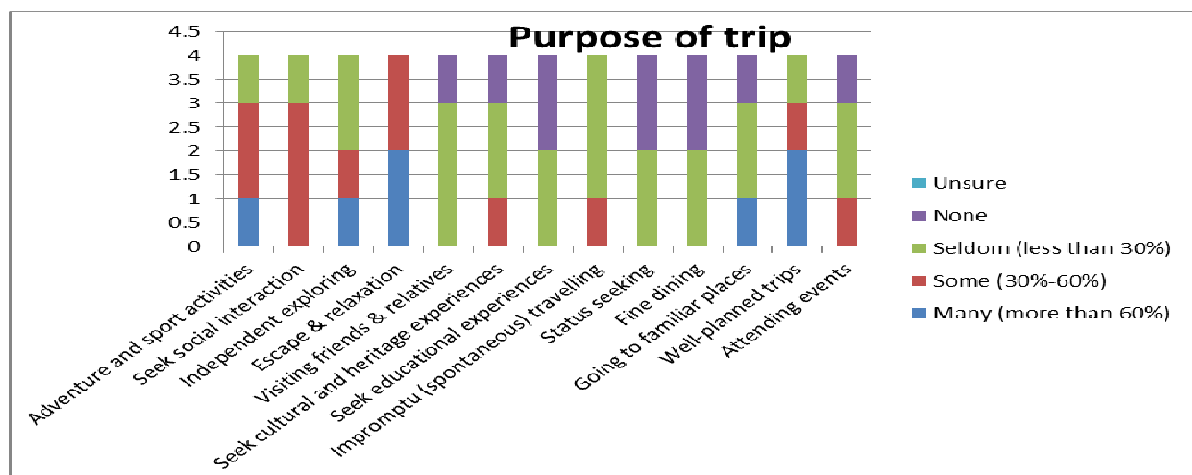


Figure 28: Purpose of trip: OR Tambo





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The majority of tourists are white over the age of 25.

A substantial number are under 45.

Tourists were classified as being high and average spenders.

Currently blacks, Indians and coloureds seldom visit the area.

Tourists to the region generally visit for escape and relaxation, adventure and social interaction.

Travel as part of well-planned trips.

Tourists to the region mostly travel in groups of five or less, with most in groups of less than three.

Groups of 11 -20 were mentioned as visiting some of the time.

High seasonal months are regarded as Dec ember and January.

Mid-season is February, March, September, October and November.

The majority of visitors are from Eastern Cape, Kwazulu Natal followed by visitors from Gauteng.



ATTRactions IN THE OR TAMBO DISTRICT

Natural attractions

The node has a range of unique natural attractions, including the famous 'Hole in the Wall', unspoilt beaches, the annual sardine run, indigenous forests and biodiversity. Known for its remoteness. Attractions are generally regarded as accessible and safe, however not accessible to the disabled. The area's natural attractions are of relative good quality, but are not popularly included in group tour packages.

The natural attractions are regarded as authentic and value for money, but lack in management and customer service. The attractions provide some opportunities for education and interactivity. The natural attractions provide visitors with opportunities for family togetherness and excitement/ adventure. There is limited opportunity for socialisation with other visitors and is not viewed as really being relaxing (remoteness and underdevelopment). It appears that these attractions do not have a high status value and offer the least in terms of nostalgia.



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Man-made attractions

There are very few man-made attractions in the node. The main man-made feature is Nelson Mandela's birthplace in Mvezo. A newly constructed bridge, the Nelson Mandela bridge, is also due to open in the near future in Mthatha to link his place of birth with the area where he grew up as a child in Qunu. This attraction could potentially lift the profile of the area. Other attractions include a lighthouse, village walk, camping sites and a few game reserves. These attractions are accessible (but not to the disabled). Some individual products are well-managed and included in tour packages, but this is not characteristic of the area as a whole.

SBE (✓✓)

Enjoy multiple destinations and different surroundings. They seek a variety of unusual activities involving socialising with friends, adventure and fun. Shopping and nightlife is also important. They seek value for money.

The attractions match the market needs in almost all cases, except for the lack in socialisation. This aspect may be addressed by the accommodation establishments in close proximity to the attractions (e.g. backpackers). There also needs to be other shopping opportunities of quality apart from the few craft markets.

NHF (x✓)

This market enjoys accessible natural places with child-friendly facilities. They want to relax and spend quality time with family and friends. Education and entertainment is of paramount importance, as they want to broaden their children's horizons in terms of cultural and heritage activities.

The natural attractions of the area offer ideal natural settings for quality time and educational opportunities. However, they are not very accessible nor child-friendly, which is important for this market. The man-made attractions need development to ensure edutainment and a quality environment (i.e. Mandela residence; bridge; notorious cultural festival) as this market wants their children to experience culture and heritage.



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HLE (x x)

Singles that pursue the finer things in life. They enjoy must-go or must-see destination of high quality, with exclusive products to boost their social status. They like a variety of traditional South African, but unusual experiences. Socialising with friends is paramount.

This area does not offer what the market desires in terms of status, exclusivity and quality. Though the attractions are unusual there are no experiences packaged around them that could serve the high demands of this market. The man-made attractions do not fit the needs of this market and extensive development of new attractions will have to be done to attract them.

SLS(x✓)

Married, generally no kids, escape and relaxation. Seek products with unique scenery, cuisine. This market seeks a reason to visit a destination i.e. a festival. They pursue special interest activities and hobbies of low impact. Socialising and relaxing with friends and sharing nostalgic moments are important to this market

The attractions offer opportunities for unique scenery and interesting activities. However, there is a lack in opportunities for socialisation and relaxation in the natural settings (more adventurous). More attractions needed where special interests can be pursued (e.g. cuisine) and where visitors can relax.

WMF(x✓)

Travel with children to new scenic destinations of high quality and comfort. This market enjoys hassle-free, quality time with friends and family. They seek entertainment with little 'surprises' and have the desire to expose their children to experiences they were not fortunate enough to have had.

The current natural attraction offering has potential, but needs improvement in quality and experiences offered by being managed better and combined with supporting activities beyond the single natural features. The man-made attractions are ideal for the experiences desired by the market (educating children, heritage), but needs great improvement in management and quality.



EVENTS AND ACTIVITIES IN THE OR TAMBO DISTRICT

The area greatly lacks in events and only two events were mentioned by area experts interviewed. They are not well-managed and appear to have a negative reputation among locals. The most prominent sporting activities are fishing, hiking and surfing, followed by angling and horse riding. Though there is great potential, the area doesn't have developed 4x4 activities.

Craft markets feature as the prominent cultural activity on offer, while camping is the most noteworthy lifestyle activity. There is a great lack in the latter. The area appears to hold some potential as a wedding destination.

SBE (*✓)

Enjoy multiple destinations and different surroundings. They seek a variety of unusual activities involving socialising with friends, adventure and fun. Shopping and nightlife is also important. They seek value for money.

Not enough events (festivals especially) or special interest activities available (in a coordinated fashion).

NHF (*✓)

This market enjoys accessible natural places with child-friendly facilities. They want to relax and spend quality time with family and friends. Education and entertainment is of paramount importance, as they want to broaden their children's horizons in terms of cultural and heritage activities.

Not enough events (cultural events) or special interest activities available (in a coordinated fashion).

HLE (**)

Singles that pursue the finer things in life. They enjoy must-go or must-see destination of high quality, with exclusive products to boost their social status. They like a variety of traditional South African, but unusual experiences. Socialising with friends is paramount.

No events offered that will attract this market. Also very difficult within the destination's profile to develop exclusive lifestyle events desired by this market. There are some



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activities that could meet this market's needs (golfing, horse riding, spas, wedding venues), but the market is not aware of them.

SLS(x✓)

Married, generally no kids, escape and relaxation. Seek products with unique scenery, cuisine. This market seeks a reason to visit a destination i.e. a festival. They pursue special interest activities and hobbies of low impact. Socialising and relaxing with friends and sharing nostalgic moments are important to this market

Not enough of what they desire. They want a reason (event) to visit, thus there is a need for events to be built around existing natural and man-made attractions. Also organised sports events need to be developed around the variety of special interest activities already on offer (angling, birding, photograph, surfing, fishing, hiking).

WMF(✓x)

Travel with children to new scenic destinations of high quality and comfort. This market enjoys hassle-free, quality time with friends and family. They seek entertainment with little 'surprises' and have the desire to expose their children to experiences they were not fortunate enough to have had.

Many activities that could potentially be attractive to this market if developed further into well-managed events, with provision for children as a feature (e.g. birding, hiking, horse riding, quad bikes).

GAPS IN THE CURRENT ATTRACTIONS OFFERING

Access to the area may be problematic.

GAPS IN CURRENT EVENTS OFFERING

Even though there is a pertinent lack in events being offered, stakeholders interviewed stated that they were not aware of any gaps in the events offering.



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POTENTIAL TOURISTS FINDING INFORMATION ABOUT THE ATTRACTIONS & EVENTS ON OFFER

Not enough is being done to promote the area, and there is a lack in product development. Individual product owners have their own websites but there is not a DMO for the area along with a main website as yet.

TOURISTS IN THE AREA FINDING INFORMATION ABOUT THE ATTRACTIONS & EVENTS ON OFFER

Individual product owners provide information to tourists while in the area. There is also a tourism office in Port St. Johns that can direct visitors to the various attractions.

RECOMMENDATIONS FOR OR TAMBO IN TERMS OF ATTRACTIONS, EVENTS AND ACTIVITIES

Natural attractions are recommended to improve management, quality and experiences offered; as well as include supporting special interest activities beyond the single attraction feature. Man-made attractions should focus on ensuring elements of education and entertainment (e.g. the Mandela heritage residence and route). The existing cultural festival must be reorganised and better managed to ensure a quality experience. Organised sports events need to be developed around the variety of special interest activities already on offer (e.g. angling, birding, hiking, photography).

A PRACTICAL SUGGESTION

A heritage route/trail following in Madiba's footsteps from his place of birth in Mvezo to his childhood village in Qunu with his retirement home (The Great Place), and the Mandela Youth and Heritage Centre, ending in Mthatha at the Nelson Mandela Museum (with satellite structures in Qunu and Mvezo) – this route will form part of the larger 'Liberation Heritage Route' (a tentative UNESCO World Heritage Site) that ultimately includes 13 sites nationally from Robben Island, University of Fort Hare, the Walter Sisulu Square of Dedication, Nelson Mandela sites (Qunu, Soweto), Robert Sobukwe House, Steve Biko



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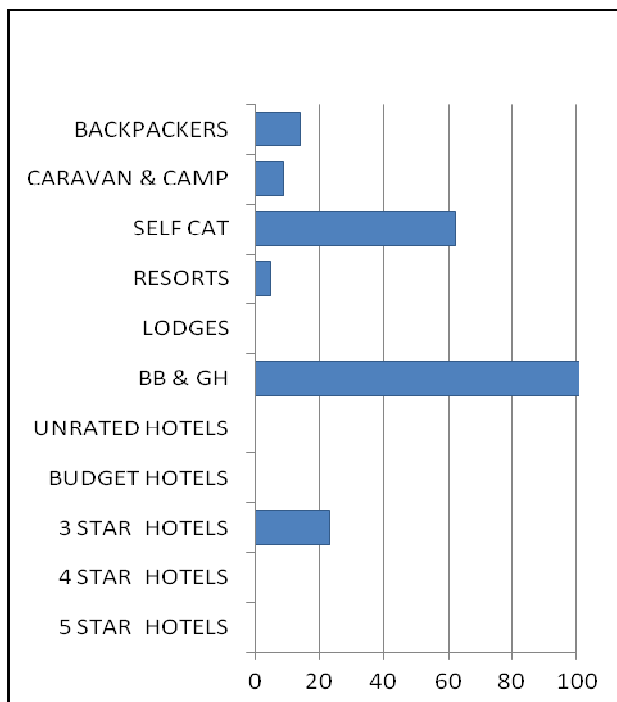
House and Clinic, Constitution Hill, Albert Luthuli Museum, Hector Peterson memorial, Sharpeville, Sol Plaatjie House, Lilliesleaf farm and Avalon Cemetery. This route covering all nine provinces can eventually be marketed as a group package tour for adults and secondary school pupils to experience the heritage of the liberation struggle.



ACCOMMODATION IN THE OR TAMBO DISTRICT

Accommodation in this area includes a large number of bed & breakfasts, guest houses, and self-catering units. There are also some backpackers and a few resorts and camping facilities. The area has extraordinary scenic beauty but is not well marketed.

Figure 29: Accommodation in OR Tambo



Source: Safarinow (2012)

SBE(✓ x)

Spontaneous budget explorers prefer the following types of accommodation establishments: bed and breakfasts; guest houses; budget hotels; self-catering units; backpackers; hostels and camping. Affordability, easy booking procedures and flexible



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accommodation programs are important for this market segment. They enjoy on-site adventure activities, to have fun with friends and to meet new people.

This node caters very well for the SBEs. There are a sufficient number of backpackers, self-catering units, bed & breakfasts and guest houses to cater for the market. The development of new backpackers in smaller towns could attract more of this market segment. The backpackers in the area provide communal areas that promote socializing among the 18-24 year age group. Some backpackers offer drumming, local day trips to unexplored areas and cultural encounters with local Xhosa people.

NHF(✓✓)

New horizon families prefer the following types of accommodation establishments: bed and breakfasts; guest houses; 3 star and budget hotels and self-catering units. Affordability, accessible locations and child-friendly accommodation are important for this market segment. They favour natural places where they can partake in relaxing family activities and educate their children.

The needs of the NHF segment match the accommodation supply of this node as there are resorts with all-inclusive packages that cater for families. There are a lot of on-site activities at the resorts, especially entertainment for children, which promote social interaction. Some of the resort rates might be too high for NHFs and 3 star bed and breakfasts might be an alternative.

HLE(✕✕)

High life enthusiasts prefer the following types of accommodation establishments: 4 and 5 star hotels, lodges and self-catering units. High quality products, easy booking procedures and all-inclusive packages are important for this market segment. They enjoy home-grown accommodation establishments close to urban areas with a variety of activities and unusual tourist experiences.

The node does not cater for the HLEs because there are not sufficient 4 and 5 star hotels and lodges. The area is also underdeveloped and doesn't offer high quality products. There are limited shopping facilities and rarely offer products that enhance their social status.



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SLS (x✓)

Seasoned leisure seekers prefer the following types of accommodation establishments: 3, 4 and 5 star hotels, lodges, bed and breakfasts; guest houses and self-catering units. Value for money, special interest offerings and unique destinations are important for this market segment. They prefer accommodation establishments in natural areas that offer local cuisine and low-impact activities.

The node caters for some needs of the seasoned leisure seeker as there are a sufficient number of 3 star and self-catering establishments. There are limited 4 and 5 star hotels. Activities at the establishments are suitable for the needs of SLSs as it induce relaxation and socializing with family friends.

WMF(✓x)

Well to-do-mzansi families prefer the following types of accommodation establishments: 3, 4 and 5 star hotels, lodges, bed and breakfasts; guest houses and self-catering units. High quality products, child-friendly accommodation and all-inclusive packages are important for this market segment. They enjoy exclusive accommodation establishments in natural areas with a variety of family activities to educate their children.

The node does not offer 5 star hotels but there are few high quality products at some of the resorts that cater for the family market. OR Tambo very seldom have comfortable accommodation facilities in rural areas.

GAPS IN THE CURRENT ACCOMMODATION PRODUCT OFFERING

There is a fair number of accommodation establishments in the District, however most of them are Guesthouses and B&B and located in areas that are not easily accessible. There is a lack of activities on site at most of the accommodation establishments or near attractions, impacting on promoting social interaction. Lack of co-ordinated marketing is a major problem in the region and the opportunity for untapped demand may exist.

RECOMMENDATIONS FOR THE ACCOMMODATION SECTOR

Develop more backpacker establishments near activities or attractions. Improve co-ordinated marketing amongst all stakeholders and use social media and electronic



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platforms to promote the unspoilt areas in the region. Improve safety in the area.



TRANSPORT TO THE OR TAMBO DISTRICT

Air access is insufficient, closest airport Mthatha, affordability a problem and can only accommodate small aircraft.

Private car most accessible mode but road conditions generally not good. Signage after the N2 appears to be a problem.

Car rental affordability and linking with air problematic.

Rail – not accessible but the Metro is brand new.

Minibuses – promotion and information main problem. Relatively few problems, don't feel it is really a tourist mode.

Intercity busses can be developed as a tourist mode but information is problematic. Seen as an affordable mode.

Tour coaches – overwhelming support for more of this type – Road to Hole in the Wall – impassable.

Roads – potholes, livestock, impassable to travel without a 4x4.

Transport demand is viewed as the needs i.t.o. transport modes and quality criteria of mode. Transport is a derived demand , depends on demand for something else (attractions).

SBE (x✓)

They drive to the destination but for further destinations they may take a bus or fly on a low cost carrier.

LCCs not available to Mthatha, but to East London and Port Elizabeth.

Road conditions may be problematic – hindrance. Most SBEs won't have a 4x4.

Limitation of private vehicle – individual travel (1-2 people) thus lack of social interactivity on transport mode en route (possible with Minibuses).

Affordability – rail not available, minibuses (not for tourists at this stage – no information), intercity busses (must link with other mode e.g. car rental then affordability becomes compromised) and tour coaches (limited scheduled group tours to region).



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NHF (✓✓)

Drive or take a bus to their destination.

Road conditions may be problematic. Private vehicle ideal for families. Intercity busses available.

HLE (x x)

Singles - Boost status, finer things in life – drive to destinations close by and fly to destination further afield, likely to hire a car if they fly somewhere but aren't impressed having to drive a car that is less luxurious than what they drive at home.

Limited air access available - Flights expensive plus car rental expensive. Limited car rental, must rent a 4x4.

SLS (x✓)

Married, generally no kids, escape and relaxation.

Drive close by, fly further afield.

Limited air access available - Flights expensive plus car rental expensive. Limited car rental, must rent a 4x4. Current market exists.

WMF (x✓)

Drive or fly depending on how close the destination is. Educate their children

Limited air access available - Flights expensive plus car rental expensive.

Limited car rental, must rent a 4x4. Educational sites possibly not accessible by private vehicle if not 4x4.

GAPS IN THE CURRENT TRANSPORT OFFERING

Air access is insufficient, closest airport Mthatha, affordability a problem and can only accommodate small aircraft. Road conditions are generally not good. Minibuses – promotion and information main problem. Relatively few problems, don't feel it is really a tourist mode. Intercity busses can be developed as a tourist mode but information is problematic. Although there is overwhelming support for more tour coaches to the area, road conditions are a serious deterrent.





TOURISTS FINDING INFORMATION ABOUT TRANSPORT

There seems to be a general lack of information available on transport to the area and transport within the area. It appears that promotion of transport is also lacking.

OVERALL RECOMMENDATIONS

The main problem is the condition of the roads and this needs to be attended to urgently.

TOURS TO AND WITHIN THE OR TAMBO DISTRICT

 Group tours (to the region)	 Local tours (within the region)
<p>There are some organised group tours to the region. Respondents believe more organised groups can be accommodated to this region. Some problems with accommodation for groups in season in some areas. Accessibility of attractions is seriously compromised by the condition of the roads which act as a deterrent to tour coaches. Promotion can be improved. New products need to be developed. Tours generally seem affordable. Incoming tour operators deemed professional.</p>	<p>There appears to be a lack of trained guides in the region. Travel information Centre not effective with promotion. The primary local tourism office has been closed for 13 months without a substitute. Accommodation establishments appear to be most effective in promoting local tours. Promotion on regional websites generally felt to be ineffective. Booking facilities quite easy for local tours. Traditional media (e.g. radio, TV, billboards, newspapers) not used/effective at all in promoting local tours. Disparate views on the effectiveness of tour operators in promoting local tours.</p>
<p>SBE (*✓) <i>Ideal packages for SBEs should sell 'fun with friends' e.g. driving trip promotions, road trip (tour of SA on a bus for two weeks with other young South Africans. Packages</i></p>	<p>SBE (*✓) <i>Activity-driven day trips</i> Coffee Bay perceived as main attraction while many other attractions can be identified but are not promoted. Products</p>



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<p><i>provide SBEs with the opportunity to visit multiple destinations without too much organisational hassle while enabling them to pay most of the costs upfront. Overland safaris are ideal.</i></p> <p>Supply inadequate for the market. Accommodation for large groups limited.</p>	<p>need to be developed.</p>
<p>NHF (x✓)</p> <p><i>Products that centre around learning new things and spending time with family. Child-friendly holiday packages and educational trips. Will take a bus to destination, affordable product, culture, heritage and nature.</i></p> <p>Limited group and packaged tours for this market segment but there is a demand based on their interests.</p>	<p>NHF (x✓)</p> <p><i>Heritage activities. Day trips that have an educational element would be ideal.</i></p> <p>Coffee Bay perceived as main attraction while many other attractions can be identified but are not promoted. Products need to be developed.</p>
<p>HLE (xx)</p> <p><i>Want glamour and comfort from their holidays</i></p> <p>Not a market for group tours and packages.</p>	<p>HLE (xx)</p> <p><i>Have the option for numerous activities but allow the consumer to choose to do activities as and when they please.</i></p> <p>Many local activities but may not meet profile of this group in terms of glamour.</p>
<p>SLS (xx)</p> <p><i>Enjoys special interest activities and hobbies. Incorporate something different and memorable such as beautiful scenery and local culture.</i></p> <p>Not regular group tour enthusiasts.</p>	<p>SLS (x✓)</p> <p><i>Enjoys different activities and new experiences</i></p> <p>Coffee Bay perceived as main attraction while many other attractions can be identified but are not promoted. Products need to be developed.</p>
<p>WMF (xx)</p> <p><i>Products that are comfortable and hassle-free with a variety and abundance of</i></p>	<p>WMF (x✓)</p> <p><i>Like variety and educational activities for children.</i></p>



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<i>activities and entertainment such as all-inclusive premium packages and family safaris. Large group tours not suitable, individual-type packages more effective.</i> Limited supply currently in “organised” format for this group	Existing activities not well promoted.
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GAPS IN THE CURRENT PACKAGES OFFERING

Some problems with accommodation for groups in season in some areas. Accessibility of attractions is seriously compromised by the condition of the roads which act as a deterrent to tour coaches. Promotion can be improved. New products need to be developed. There appears to be a lack of trained guides in the region. Coffee Bay perceived as main attraction while many other attractions can be identified but are not promoted.

TOURISTS FINDING INFORMATION ABOUT PACKAGES ON OFFER

Travel information Centre not effective with promotion. The primary local tourism office has been closed for 13 months without a substitute. Accommodation establishments appear to be most effective in promoting local tours. Promotion on regional websites generally felt to be not effective. Booking facilities quite easy for local tours. Traditional media (e.g. radio, TV, billboards, newspapers) not used/effective at all in promoting local tours. Disparate views on the effectiveness of tour operators in promoting local tours.

RECOMMENDATIONS

The coordination of the tourism industry in this region is not effective. While there are many activities and opportunities, resources for promotion and information on the activities is lacking. It is the ideal destination for SBEs in small numbers (e.g. minibuses) rather than tour coaches. Perception of variety of local activities is lacking because Coffee Bay seems to be the most well-known but there are various heritage activities that could be developed further for the tourism industry. These activities would be very educational and interesting for the SBEs, NHFs, SLS and WMFs (e.g. Nelson Mandela's birthplace).



SECTION 7: CONCLUSION

7.1. Overall conclusion

The results show that in each of the four nodes the ability of the current product offerings to meet the needs of the identified market segments differs. In the Central Karoo the ability of the product offerings to meet the needs of all five segments fall within the lower quadrants, ranging from very limited demand for the destination and limited appropriate supply for the High Life Enthusiasts (HLE) segment to a high demand but inadequate supply for the New Horizon Families (NHF) segment. In Bushbuckridge the results again range from limited demand from the High Life Enthusiasts for the destination with a slightly greater ability of the destination to meet their needs if the development of products or stimulation of demand could occur. Bushbuckridge appears to have the most appropriate product offerings for the New Horizon Families while the demand for this destination seems to be highest from the Spontaneous Budget Explorers. The West Coast shows a distinct potential demand for the destination by four of the segments, namely Spontaneous Budget Explorers (SBE), New Horizon Families (NHF), Seasoned Leisure Seekers (SLS) and Well-to-do Mzansi Families (WMF) with the potential of the destination to meet their needs ranging from fairly low to fairly high. The OR Tambo district needs to be looked at more circumspectly given the lack of information on the district. Three of the segments, namely the New Horizon Families, Spontaneous Budget Explorers and the Seasoned Leisure Seekers show a distinct demand for the destination with the Well-to-do Mzansi Families appearing to have some demand and the High Life Enthusiasts very little. The product offerings in this region are currently underdeveloped or unknown by the markets so its perceived ability to meet the needs of the market segments appears low. The position of each market in the tourism node had to be interpreted by looking at the findings in depth because the position of the market segment could be as a result of inadequate supply where the region has many gaps in its offering and has much to do to improve its product offering, or alternatively, the product offering may be adequate but the market is unaware of it. From the demand side the results had to be interpreted against the possibility that there is limited demand for the region or that there is an untapped demand because of the unawareness of what the destination has to offer.



7.2. Overall recommendations

The purpose of positioning the market segments as a relationship between current offerings and demand was to provide a foundation for decision-makers to formulate appropriate responses to the gaps highlighted in the product offerings. Decision-makers need to decide whether the appropriate response to gaps in a particular market segment should be addressed through the improvement of the tourist offerings or through a greater focus on developing the demand, or both. Each tourism node needs to be viewed separately by decision-makers in that region. Each market segments' needs must be considered in the context of what the region has to offer and the ability of the products offerings to meet these needs. Specific strategies need to be put in place to overcome gaps identified with due consideration of the reason for these gaps i.e. that the product offering needs to be improved or that the awareness of the product offering needs to be created. Regions such as the West Coast and OR Tambo District appear to have greater problems in cohesion of those in the tourism industry as well as a lack of a common vision for the region. These issues should be addressed before resources are put into improving product offerings.

7.3. Directions for future research

This research study provides a foundation and methodology to replicate this study in three ways:

- i. Matching the product offerings of all sectors with potential demand of the five market segments in other identified tourism nodes.
- ii. Matching the product offerings of one specific sector with the potential demand of the five market segments.
- iii. Any permutation of matching all or one of the five market segments to potential demand in identified tourism nodes for all sectors or per sector.

The current study provided an effective tool for further studies of this nature.



7.4. Limitations of the study

Apart from time and resource constraints the research had certain limitations. The questionnaire was very long and, given the nature of the information required, quite complex which probably inhibited responses although through the efforts of the research team a relatively satisfactory response rate was obtained. The research could be done in more depth if one region is selected. Each region is complex and has unique characteristics that could not be adequately captured in this research. A focus group method could also be effectively applied to this research, perhaps with more information being gleaned on recommendations and strategies forthcoming. However, this requires significantly much more time and resources to implement.

7.5. Concluding remarks

The value of the research lies in the development of a model which enables the matching of supply and demand based on specific market segments and regions. The research provides a foundation for further research.



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APPENDIX 1

EXAMPLE OF CRITERIA DERIVED FOR ASSESSING A SECTOR (ATTRACTIONS, EVENTS & ACTIVITIES)



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HIGH LIFE ENTHUSIASTS

	OVERALL	ATTRACTIONS		EVENTS				QUESTIONS
		Natural (including natural events)	Man-made / cultural	Sport	Cultural	Lifestyle	Religious	
<i>Middle- high income; All races; 18-24 years old; All family situations</i>				- Annual - Seasonal - Monthly - Weekly				
Location * (<i>generic</i>)	Urban areas Activities & accommodation should be close to each other A selection of a few 'must-go' destinations							
Product attributes	High quality experiences Exotic and exclusive products Products should contribute to their social status Home-grown/ traditional SA experiences Unusual tourism experiences							
Facilities and services * (<i>generic</i>)	Locations with access to electricity and technology for social media							



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Level of physical activity <ul style="list-style-type: none"> • Passive • Active (soft, hard) 	Variety of activities							
Psychological Experience <ul style="list-style-type: none"> • Family togetherness • Socialization • Excitement • Escape • Nostalgia 	Travel with friends Products should contribute to their social status Unusual tourism experiences							
Seasonality * (<i>generic</i>)	Will visit during low season							
Financial/costs * (<i>generic</i>)	Products should be value for money, but not cheap All-inclusive packages Use special offers e.g. 4 for the price of 2. Use special offers during low season							
Branding and positioning * (<i>generic</i>)								
Information Search & Bookings * (<i>generic</i>)	Easy booking procedures See travel deals in newspapers Impulsive/last-minute bookings							



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WELL TO-DO MZANSI FAMILIES

	OVERALL	ATTRACTIONS		EVENTS				QUESTIONS
		Natural (including natural events)	Man-made / cultural	Sport	Cultural	Lifestyle	Religious	
<i>Middle- high income; All races; 18-24 years old; All family situations</i>				- Annual - Seasonal - Monthly - Weekly				
Location* (<i>generic</i>)	Destination away from urban areas and work environment Prefer remote areas							
Product attributes	Travel to new destinations Increase visits to national parks and areas with scenic beauty Prefer travel products of high quality & comfort Child friendly							
Facilities and services * (<i>generic</i>)								



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<p>Level of physical activity</p> <ul style="list-style-type: none"> • Passive • Active (soft, hard) 	<p>Hassel free and comfortable holidays Child friendly</p>							
<p>Psychological Experience</p> <ul style="list-style-type: none"> • Family togetherness • Socialization • Excitement • Escape • Nostalgia 	<p>Spend quality time with friends and family Family activities Entertainment for children Want to expose their children to a variety of tourism services and products that they didn't have as children Want to experience generosity and 'lots of little surprises'</p>							
<p>Seasonality * (<i>generic</i>)</p>	<p>School holidays, especially during April and December</p>							
<p>Financial/costs * (<i>generic</i>)</p>	<p>All-inclusive options Variety of leisure activities included in the price Value for money, not being overcharged Want to pay everything upfront</p>							
<p>Branding and positioning * (<i>generic</i>)</p>								
<p>Information Search & Bookings * (<i>generic</i>)</p>	<p>Book online with service provider Read about travel deals in newspapers</p>							



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APPENDIX 2

MAPS AND MOTIVATION OF SELECTED NODES



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1. WEST COAST DISTRICT

The Cape West Coast is a well-defined tourist area within the Western Cape and consists of six distinct regions: The Swartland; The Peninsula; Bergrivier; Cederberg; Matzikama; Hardeveld. Statistics on domestic visitor arrivals to the West Coast are not easily available but if taken within the context of the Western Cape as a tourist destination a number of compelling reasons exist to select the West Coast as a tourism node for analysing the supply of tourism products for the five key domestic market segments.

According to the SAT Domestic Tourism Survey the Western Cape as a province has shown a decline in domestic tourists over the last three years (one of three, with KZN and Eastern Cape being the other two). Surveys done by Cape Town Routes Unlimited show that declining numbers of domestic tourist arrivals is also evident on the Cape West Coast. The diversity of the supply of tourism products on the Cape West Coast has the potential to meet the needs of all five key market segments. The Cape West Coast includes the Coast, the Countryside and the Mountains, has a host of attractions which include, amongst many others, festivals and events, vineyards, heritage sites, nature reserves, fishing villages, outdoor adventures, whale watching and art experiences.

According to the Western Cape Tourism Barometer (2011) the Cape West Coast and Cape Karoo were the only two regions in the Western Cape which received more domestic visitors than overseas ones, thus highlighting the attractiveness of the destination for domestic tourists.

The trend in declining numbers of domestic tourists should thus be reversed, particularly those originating from other provinces (approximately two-thirds of tourists in the Western Cape are intra-provincial).

In comparison to the other provinces the Western Cape continues to have the largest volume of holiday tourists as opposed to VFR tourists. Holiday tourists have a much higher revenue potential than those of the VFR market (SAT Domestic Surveys 2009 – 2010). Given the established nature of the West Coast tourist infra-structure and attractiveness of the diverse product offerings this region is well positioned to activate increased tourist numbers for holiday purposes.

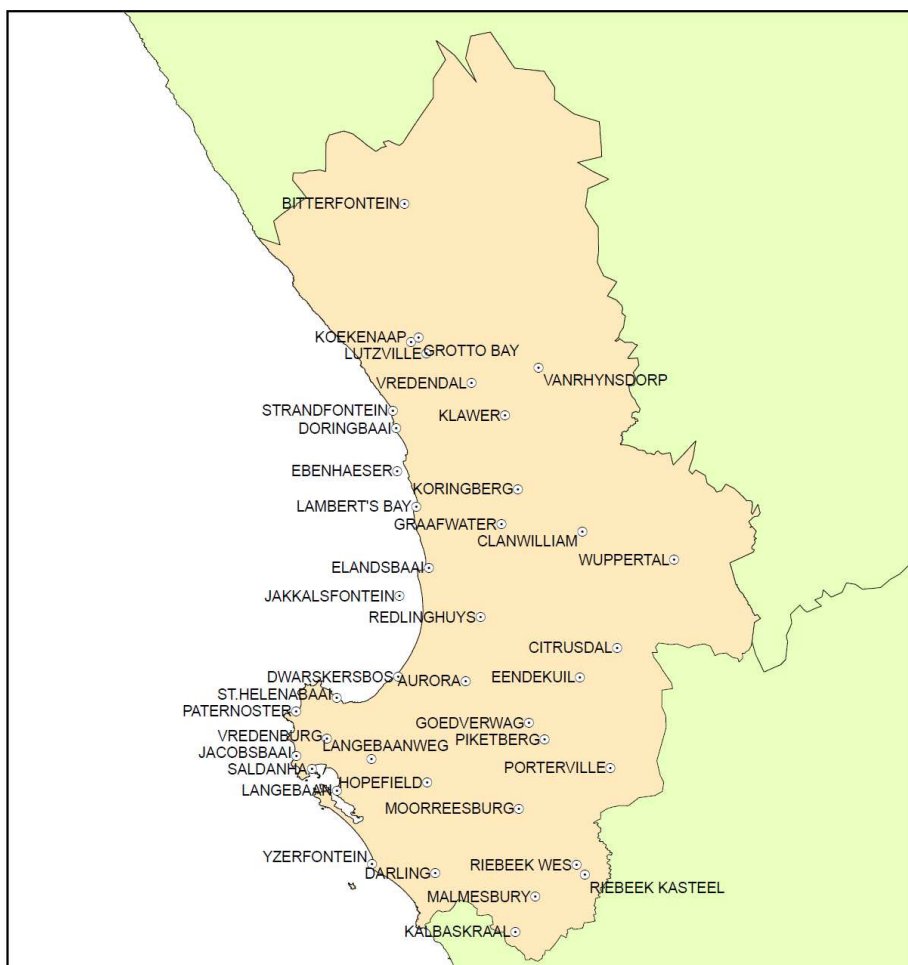
The five key market segments have all been identified by the SAT for tourist growth activation. Without exception the majority within each group has visited the Western Cape mainly for VFR purposes. Also, the majority in all, but one (the seasoned leisure seekers) of the segments has indicated that the Western Cape is top of the list of provinces for a visit within the next 12 months. The Cape West Coast provides the opportunity for all five key market segments to be converted from VFR to holiday tourists, thus increasing revenue and tourist numbers to the Western Cape.

In creating demand within the Cape West Coast as a priority tourism node by combining value propositions, products, information needs and channel requirements supports the strategies highlighted in the NTSS document.



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2. OR TAMBO DISTRICT

The Oliver Tambo District in the Eastern Cape covers most of the former Transkei and includes the beautiful Wild Coast, Pondoland and Mthatha as the main centre. Tourism can become a major income source through investment and development that will increase job opportunities to the 71% unemployed people between the ages of 18 – 65.

Tourism development will protect the natural heritage in the OR Tambo District. Port St Johns is already developing as a destination, and is famous for deep sea fishing and shore angling. The breath taking Wild Coast, which host many resorts and nature reserves, will protect natural and cultural resources through tourism development. The Pondoland coast is known for its spectacular eco-tourism, nature reserves, rivers, mountains and indigenous forests. The sub-tropical coastal belt, cultural heritage and warm temperatures make it an ideal tourist destination.

Development and investment in the OR Tambo district will improve access to remote areas, creating opportunities for tourism. Improved rural access roads will provide tourists the opportunity to visit the area with sedan vehicles and make locals more mobile. Only 1% of the inhabitants of the district have their own vehicles and 3% travel as passengers in private vehicles. Minibus taxis give transport to 6% inhabitants and 1% uses the bus. With improved roads, more vehicles could access the area and the 89% inhabitants that walk to their destinations will be reduced. It will make them more mobile and increase their job opportunities at locations further away from their homes.

The Eastern Cape has an estimate population 6,8 million people with the Oliver Tambo district that has highest population density of 90 people per square kilometre. Tourism development will increase the 7% contribution of the Eastern Cape to South Africa's GDP (gross domestic profit) keeping in mind that 15% of the population live in the province. It will also reduce pressure on natural and economical resources which cause 88% of households to live below the minimum poverty level.

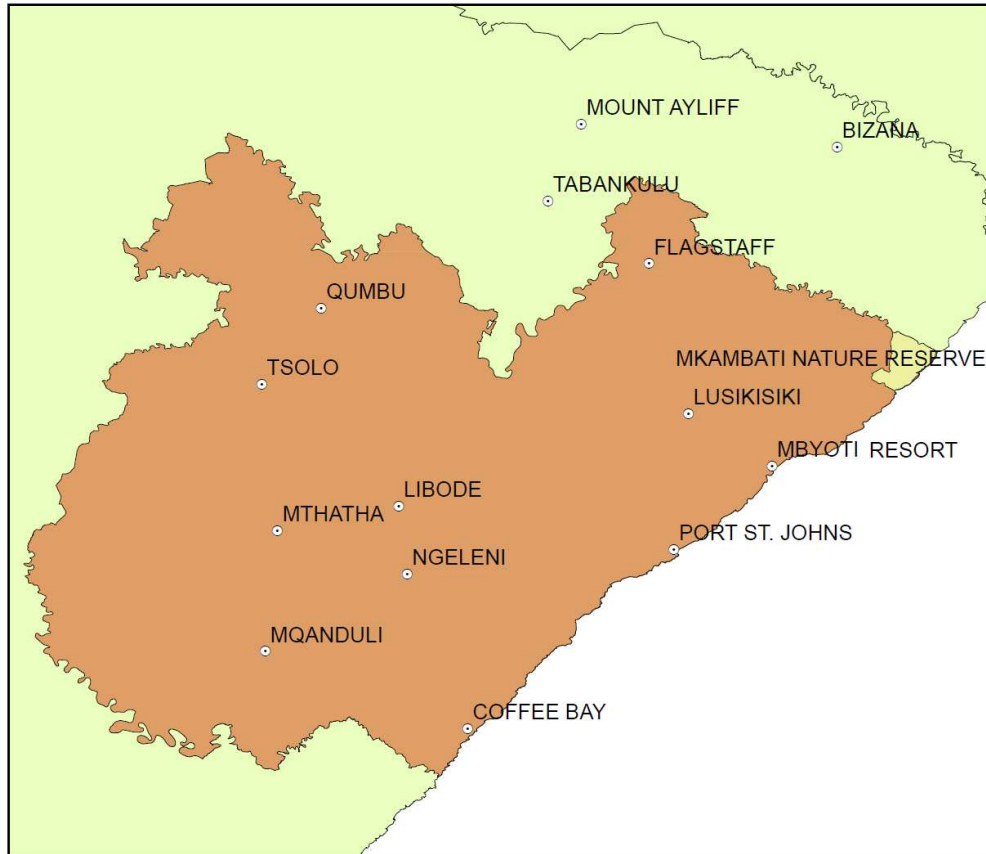
99% of the 1,5 million inhabitants of the OR Tambo district are black and Xhosa speaking. This contributes to a rich cultural heritage which appeals to the market segments. The Nelson Mandela Museum, in Mthatha and Qunu, is one of the major heritage attractions that showcase the history of apartheid and the life of the former President.

With the largest migration outflow in South Africa, the Eastern Cape has around 60% women headed households and a population of 47% that is younger than 15 years of age. Tourism development will attract more VFR tourists (visiting friends and relatives) to the area and its attractions. Local families would be able to see their families more regular, reducing the negative social impacts. It will also educate the young population about tourism so that they in future, can become tourists themselves.



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3. CENTRAL KAROO

The Great Karoo is one of the world's most unique arid zones and is home to some of the world's most important archaeological sites. It is a place of pioneers such as Dr Emil (father of modern orthopaedics), Albert Fick (contact lenses) and Prof Chris Barnard (world's transplant pioneer).

The area covers the Municipal Districts Beaufort West, Laingsburg and Prince Albert and has population of 56 232 people, which is 1.1% of the total population of the Western Cape of 5.3 million. The area represents some of the poorest communities in the country and in 2007 16735 people received social grants to survive the economic hardship (Regional Development Profile: Central Karoo District, 2010).

According to the Central Karoo District Nodal Vision 2010, the area is key in its position on the N1 highway, which is the busiest national road in the country linking the north with the south on route to Cape Town and the Garden Route. The Karoo is seen as the gateway to the Cape. The famous R62 tourism route through the Klein Karoo and Oudtshoorn attracts large numbers of tourists to this national tourist destination, which includes the famous Cango Caves. The Karoo National Park is the major tourist attraction in the regions with 33 595 visitors annually and accounts for the highest occupancy 85% and 57% bed nights of all national parks. The Park is a convenient and interesting overnight stop for visitors on route to Cape Town. The area also offers wide open spaces, magnificent landscapes, panoramas and a cultural diversity that appeals to international and domestic tourists.

The Central Karoo Region attracts 92,3% of the its visitors from the domestic market, travelling from the Western Cape (51,1%), Gauteng (16,4%) and the Eastern Cape (7,2%). The travel pattern consists of 32,5% overnight travellers and 67,5% day visitors. The average stay per visitor is 3 nights, but most visitors will spend one night in the destination. Laingsburg and Beaufort West are your two main towns. The purpose of the visit is mainly holiday (79%), business (11%), religion (0,3%), visiting friend and relatives (2,7%), weddings (0,3%), cuisine (1,1%) and sport (1,9%)(Western Cape Tourism Barometer, 2011).

The problem this destination faces is the fact that the majority visitors only spend one night in the destination and the area does not offer enough activities, events and attractions to extend visitor stays.

The upcoming Karoo Tourism conference has the potential of addressing some of the issues the Central Karoo Region is facing. The conference is structured to deliver on the following:

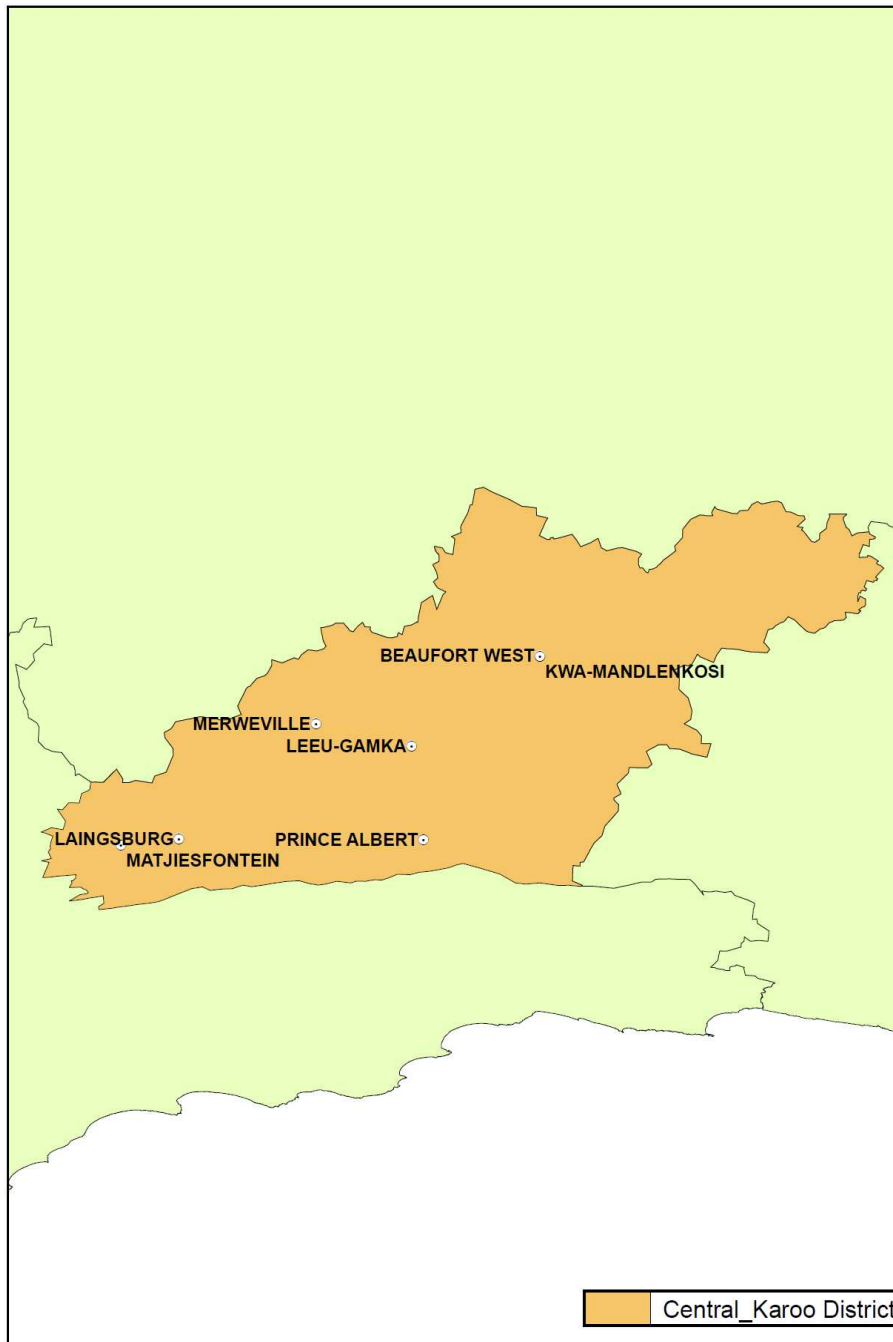
- The importance and significance of this central region in the development of regional tourism and the upcoming launch of the Karoo Tourism Strategy;
- The rich heritage and cultural diversity of the region;
- The development of tourism networks to bolster the regional Karoo economy;
- The establishment of a cross-border tourism master plan for the Karoo region;
- The development of authentic Karoo cuisine; and
- The significance of Karoo agriculture to stimulate local economic growth;
- The development of a "power marketing" initiative with the Western Cape and Northern Cape Tourism authorities.

This tourism node has the potential to create tourism demand.



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4. BUSHBUCKRIDGE

Even though the province is among the top receiving visitors of international tourists, there are trends in the domestic market visitation patterns that indicate a need to enhance the way in which the province's current offering is presented to this market. The province only stands in 5th position for visits by domestic tourists (8.3% of total). Of this market 56,8 % are for VFR – the 3rd in top 3 provinces for VFR. This leaves a great opportunity to package the offerings for these VFR tourists to diversify their purpose of trip beyond VFR (which is not necessarily a very profitable market). The number of leisure/vacation/holiday visits are only 14,4%, which appears low, but is 3rd only after Western Cape and KwaZulu-Natal, indicating that a leisure association already exists within the domestic market. The major concern for this node is that majority (60,6%) of the visitors stay only 1 – 3 days (short breaks). The node performs increasingly weaker than other domestic tourism nodes as the length of trip increases. It has the **2nd lowest** share of the 15 – 21 nights category. The majority of tourists make only 1 trip to the province and it has the 3rd lowest score in the 'more than 5 repeat trips' category. **THUS:** it is being visited but strategies have to be developed that will entice tourists to stay longer and spread spending to wider region. It has the 4th highest score in terms of recreation and culture spending (is this what the domestic market is looking for in a leisure holiday experience?); while holding the lowest position in terms of usage of domestic transportation by tourists. Thus, it is necessary to identify product distribution and quality in order to facilitate visitor spread and extended stay – supported by an improvement in transportation available. Product improvement could increase return visits and if product is correctly packaged, could entice visitors to see other places not seen before. [Data sourced from the Domestic Tourism Survey – Nov 2009 to May 2010 (Stats SA, 2011)]

Additional perspective on the potential of this node: Lydenburg can be regarded as a gateway (to Dullstroom, Sabie, Graskop, God's Window) as within its environs there are many 'new' mines (granite, chrome, coal, platinum) and all the people living on the mines are in search of recreation and experiencing new destinations. Also towns such as Barberton and Pilgrims Rest can be repackaged as heritage mining towns and will draw both domestic and foreign visitors. Furthermore, Nelspruit is the gateway to the Kruger

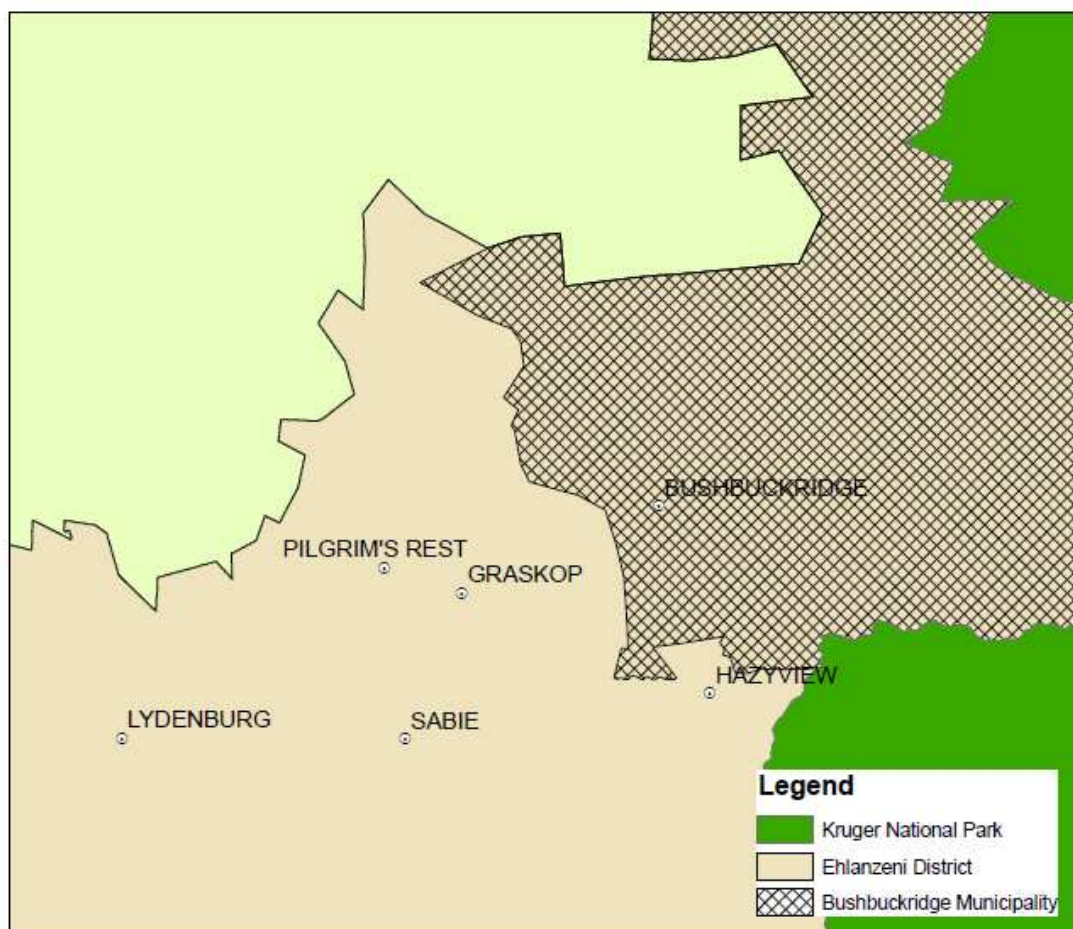


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National Park together with Hazyview, although Nelspruit is also the gateway to Mozambique for domestic travellers. They can be encouraged to visit some places en route to Mozambique.

After the recent crisis surrounding eviction of existing businesses in the historical town of Pilgrim's Rest, the town and area has experienced a renewed interest amongst South Africans. The town actually experienced a 'bumper season' in 2012 as many people wanted to see the town before it was too late. In addition, the new Kruger Lowveld Forum has been established to increase tourism development and investment in the area and to voice the concerns of the industry. The Mpumalanga Historical Interest Group has also recently joined the fight in ensuring the preservation of national heritage throughout the region, especially for the sake of 'responsible tourism' (Anon, 2012; Mpumalanga Historical Interest Group, 2012) .





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APPENDIX 3

LIST OF POTENTIAL RESPONDENTS



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NO.	NAME	TELEPHONE	ORGANISATION	TOWN/NODE
1	Christo	023 551 1482	Lains Lodge	Central Karoo
2	Marietta	051 753 0422	Toverberg B&B	Central Karoo
3	Cathy	051 753 0285	Travellers Joy Guest House	Central Karoo
4	Ryan	021 794 9050	SA Hotels	Central Karoo
5	Rainor	083 321 9399	Karoo Gateway Hotel	Central Karoo
6	Ria	023 541 1227	Dennehof Guest House	Central Karoo
7	Jonel	087 941 7544	Seweweekspoort Accomodation	Central Karoo
8	Jeff	079 768 2748	Moondance Farm Karoo	Central Karoo
9	Zwingli	023 414 4434	Huas Holzapfel	Central Karoo
10	Brian vd Westhuizen	023 415 2828	Karoo National Park	Central Karoo
11	Johanda	023 348 7200	Golden Valley Casino	Central Karoo
12	Suzanne	023 541 1768	Soet Karoo Wine Estate	Central Karoo
13	Lydia Barella	023 541 1172	Fransie Pienaar Museum	Central Karoo
14	Chantal Schoeman	084 780 7318	Bergwater Tourism	Central Karoo
15	Ailsa Tudhope	023 541 1211	The Story Weaver	Central Karoo
16	Japie Classen	083 724 7916	Karoo Birding Safaris	Central Karoo
17	Sonia	084 583 9578	Olive Grove Guest Farm	Central Karoo
18	Jakkie	023 561 3011	Matjiesfontein village	Central Karoo
19	Francios	086 127 2872, 011 886 9996	Southern Africa Tourism Services Association	Central Karoo
20	Zelia Mullins	023 541 1366	Prince Albert Tourism Bureau	Central Karoo
21	Kevin Stolzberg	023 415 1488	Beaufort West Tourism Bureau	Central Karoo
22	Jay Jonkers	076 194 3630	Central Karoo Tourism Organisation	Central Karoo
23	Jolanda	023 551 1868	Laingsburg Tourism	Central Karoo
24	Anita Haramse	072 992 5099	The Second Karoo Development Conference	Central Karoo
25	Doreen Atkinson	051 401 3599	The Second Karoo Development Conference	Central Karoo
26	Marie	051 753 1582	Bordeaux Restaurant	Central Karoo
27	Brent	082 749 2128	The Gallery Cafe	Central Karoo
28	Pam	083 316 4015	Vergeet my Nie	Central Karoo
29	Sascha Klemm	(023) 415 1488 (083) 765 4164	Karoo Gateway Guesthouse and Airport	Central Karoo
30	Kiewiet van Rooyen	022 433 8516	West Coast Tourism	West Coast
31	Dave Cornelius	022 433 8518	West Coast Tourism	West Coast
32	Dave Osborne	083 327 4803	Peninsula Tourism	West Coast
33	Ilse Lochner	(022) 482-1090	Cederberg Tourism	West Coast
34	Nathalie Wagenstroom	(022)9313732	Porterville Tourism Bureau	West Coast
35	Deidre	071 116 6155	Luzmore Tourism Development	West Coast
36	Mamerwa Baron	(022) 7522323	Paternoster Info Centre	West Coast
37	Labeeqah Schuurman	(021) 4839279	Western Cape Government	West Coast
38	Lizzy Mathopa	(021) 4839279	Western Cape Government	West Coast



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39	Riana Meyer	(021) 4839279	Western Cape Government	West Coast
40	Noxolo Ntenetya	(021) 4839279	Western Cape Government	West Coast
41	Dirk Jourbert	021 422 2970	ODA Consultants	West Coast
41	Martin Nicol	021 422 2970	ODA Consultants	West Coast
42	Steve	(022)7077000	Club Mykonos Hotel & Casino	West Coast
43	Esther Steens	(022)4822024	Clanwilliam Visitor Centre	West Coast
44	Pierre Nel	(022)7722144	West Coast National Park	West Coast
45	Mariette du Toit	(021)4876802	Cape Town Tourism	West Coast
46	Chrizelda	(022)7151968	Hardveld Tourism	West Coast
47	Wilhma`	(022)4872989	Swartland Tourism	West Coast
48	Wilhelm Herbst	082 655 5026	West Coast Business Chamber	West Coast
49	Adrian	(021)4874800	WESGRO	West Coast
50	Lisa	(021)4874800	Melkboomsdrift Lodge	West Coast
51	Bernice Nel	(022)7141264	Protea Hotel Saldanha Bay	West Coast
52	Megan	(022)2013376	Vredendal Info Centre	West Coast
53	Johan Viljoen	(027)4873221	Die Courant	West Coast
54	Mart-Mari	(022)714-1177	Blue Bay Lodge	West Coast
55	Elsa Wolfaardt	(022)4512929	Yzerfontein Tourism	West Coast
56	Sheryl	(027) 482 2018	Yellow Aloe Guesthouse	West Coast
57	Gerda de Wet	gerda@rooiboslt .co.za		West Coast
58	Janine Mare	(021) 794 9050	South African Golfing and Safari Tours	West Coast
59	Andrew Bellamy	(022) 451 2716 (086) 1115 284	Meeurots Resturant	West Coast
60	MC Kruger	(022) 7722412 (083)4178459	Walking on Water Guest House	West Coast
61	Yvette Odendal	(022) 7830831/ (082) 7736118	Bergrivier Tourism Organisation	West Coast
62	Angelica	(022)7720193	Langebaan Country Estate	West Coast
63	Mrs Anna Demier	(022) 783 0385/ 084 366 2461	Sandvelder B&B	West Coast
64	Mrs Monika de Jager	(027) 201 3376 / 082 611 3999	Namaqua West Coast Tourism	West Coast
65	Mr David Wiegthman	(022) 451 2790 (076) 4545 881	Blombosch Hideaway Lodge	West Coast
66	Zuki	043 743 438	Border kei chamber of business	OR Tambo
67	Les	043 743 438	Border kei chamber of business	OR Tambo
68	Linda	043 743 438	Border kei chamber of business	OR Tambo
69	Darryn	043 743 438	Border kei chamber of business	OR Tambo
70	Miguel	011 880 3790	Tourism Enterprise Partnership	OR Tambo
71	Thembeke	043 701 9612	Eastern Cape Parks and Tourism Agency	OR Tambo



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72	Kagiso	012 654 7525	Tourism Business Council of South Africa	OR Tambo
73	Donne	043 748 1630	Seekers Lets Travel	OR Tambo
74	Cheryl	043 748 1630	Seekers Lets Travel	OR Tambo
75	Eddie Marafane	047 501 6400	Eastern Cape Parks and Tourism Agency	OR Tambo
76	Wiseman Luma	047 531 5290	Tourism Information Centre Mthatha	OR Tambo
77	Nangamso	072 101 7771	Port St. John Tourism	OR Tambo
78	Eric Cornelius	011 011 9288	South African Bus Operation	OR Tambo
79	Chantel Spargo	047 575 2005/ 071 896 8977	Oceanview Hotel-Coffee Bay	OR Tambo
80	Belinda	047 575 2048/083 656 4350	Coffe Shack (Back Packers)	OR Tambo
81	Amy	047 575 2073	Bomvu Cultural music Festival (cofee bay)	OR Tambo
82	Tobeka	047 575 2051	Coffee Bay Hotel	OR Tambo
83	John Costello	082 550 5430	Outspan Inn	OR Tambo
84	Fikiswa Maqodo	039 252 0141	Flagstaff hotel	OR Tambo
85	Ursula	072 408 8158	Sea Castle Guesthouse	OR Tambo
86	William Roos	083 299 5300	Wild coast association	OR Tambo
87	Siona	011 258 5300	The hoilday Factory-Travel agency	OR Tambo
88	Ryan Mackie	082 782 3142	SA hotels	OR Tambo
89	Barbara Hamm	082 239 2111	Bed and Breakfast association	OR Tambo
90	Elsa van der Merwe	047 564 1741	Umzimvubu Retreat guesthouse	OR Tambo
91	Alice Osborne	011 462 5642	Food and beverage reporter	OR Tambo
92	Zakeerah Abrahams	043 748 1680	Seekers Lets Travel	OR Tambo
93	Sandy Berks	046 624 1235	Sunshine Tourism	OR Tambo
94	Nokuzola Tentani	082 483 4643	Nelson Mandela Museum	OR Tambo
95	Wendy Aylisse	082 674 1064	Mboti river lodge	OR Tambo
96	Nora Nel	082 378 0804	Stones guest house	OR Tambo
97	Nomsa Arosi	072 415 1547	Sekethwa B&B	OR Tambo
98	Nombeko Fitlane	079 190 3363	Lubobeni tours	OR Tambo
99	Zukiswa Meme	072 146 1075	Zukies Pride project.	OR Tambo
100	Fezeka Maqwathi	(047) 501 7000/ (079) 504 1764	OR Tambo District Municipality	OR Tambo
101	Mr Maxwell Mpalala	(047) 501 7000	OR Tambo DM	OR Tambo
102	Ms Chazisa Coni	(047) 501 7000	OR Tambo DM	OR Tambo
103	Mrs Andiswa Dunywa	(047) 501 7000	OR Tambo DM	OR Tambo
104	Miyelani	072 606 8984	LED Mpumalanga Tourism agency, bushbuckridge	Bushbuckridge
105	Willie Jacobs	013 764 1177	Sabie Tourism Office	Bushbuckridge
106	Linda Grimteck	013 755 1988	Lowveld chamber of business tourism	Bushbuckridge
107	Lisa Shread	013 755 1988	Lowveld chamber of business tourism	Bushbuckridge



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108	Calvin Mdluli	013 759 5300	Dept of Economic Development and Environments	Bushbuckridge
109	Micah	013 752 2300	Mpumalanga Tourism Enterprise Partnership	Bushbuckridge
110	Cherette	sabiehorsetrails@yahoo.com	Sabie Horse Trails	Bushbuckridge
111	Andrew	013 764 2682 / 083 966 5089	Big Sky Outdoor Adventures	Bushbuckridge
112	Steve Waton	(084) 400 5107 / (082) 920 3151	Whats On Tours	Bushbuckridge
113	Patricia		Sabie Guest house	Bushbuckridge
114	Musa	013 766 6554	PublicWorks/Roads/ Transport	Bushbuckridge
115	Leonard	011-217-0600	CATTHSETA	Bushbuckridge
116	Sibusiso	086333 4272	FEDHASA	Bushbuckridge
117	Pedrie	013 764 2914	Newspaper company	Bushbuckridge
118	Ntando	011 705 2054	Restaurant Association of South Africa	Bushbuckridge
119	Karin	karin@fairtourism.org.za	Fair trade in Tourism South Africa	Bushbuckridge
120	Lieze	ghoeks@iafrica.com	Ghoeks Guesthouse	Bushbuckridge
121	Fikile Ndlovu	013 235 7300	Thaba Chwe Municipality	Bushbuckridge
122	Cinderella Cave	013 235 7304/ 0820443145	Thaba Chwe Municipality	Bushbuckridge
123	Leane Grobbelaar	GrobberlaarL@tut.ac.za	TUT Nelspruit	Bushbuckridge
124	Rodney Malehase	rmalehase@mpg.gov.za	Mpumalanga Provincial Government	Bushbuckridge
125	James Shread	james@mistymountain.co.za	Sabie Chamber of Commerce and Tourism	Bushbuckridge
126	Sam Boucher	BoucherS@tut.ac.za	TUT Nelspruit	Bushbuckridge
127	Prince Nkateko Khoza (referral)	(013) 745 3559 (076) 452 2825	TUT Nelspruit	Bushbuckridge
128	John Theunissen	(013) 764 1177	Trips ZA	Bushbuckridge
129	Anet van Niekerk	013 735 5118	Djuma Game Reserve	Bushbuckridge
130	Elizabeth	053 050 0170	Sethlare Guest Lodge	Bushbuckridge
131	Dale Shepard	082 467 5771	Sabie River Bush Lodge	Bushbuckridge
132	Alison	013 735 5839	Simbambili Game Lodge	Bushbuckridge
133	Jb	015 793 1976	Thornybush Game Lodge	Bushbuckridge
134	Belinda	013 935 5125	Inyathi Game Lodge	Bushbuckridge
135	Clarisse	015 001 7009/083 261	Kambaku Safari Lodge	Bushbuckridge
136	Herman	(084)6086810	Umkumbe Safari Lodge	Bushbuckridge
137	Gavin	(083)4625596	Tydon Safari Camp	Bushbuckridge
138	Engela Krugel	082 753 7940	Lydenburg Business Chamber	Bushbuckridge



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139	Mr Garth McFarlane	0 72 10 8 576 8	McFarlane Tourism	Bushbuckridge
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APPENDIX 4

COPY OF QUESTIONNAIRE



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Introductory letter and consent form for participation in a research study

The National Department of Tourism and the University of Pretoria

Your region has been identified by the National Department of Tourism (NDT) as a **“Priority Tourism Node”**.

The NDT has commissioned the Department of Tourism Management at the University of Pretoria to survey tourism professionals in your area to determine whether tourism offerings meet the needs of **domestic tourists**. The results will be used for product development for identified segments of domestic tourists, with specific reference to accommodation, food & beverage services, attractions & events, transport services, packages & tours and niche areas.

The research is focused on **five domestic tourist market segments** as identified by SA Tourism. We attach a brief description of each of these segments for your information.

Potential benefits of the research

This research aims to benefit tourism development in your area. Your participation as a tourism professional is extremely important for the NDT. The results and recommendations of the research will be used by the NDT for tourism development in your region, which makes **your participation** imperative.

Data collection process

- i. A two-step process will be followed requiring your opinion: You will receive an **email** with a web link to access the **questionnaire** or with an attachment with the questionnaire that you can complete electronically or/ fax back to us. A researcher will phone you to make sure that you have received the questionnaire and to answer any of your questions. We would appreciate it if you fill in the questionnaire to the best of your knowledge of tourism in your region.
- ii. After we have received your completed questionnaire, the researcher will again phone you at a time that suits you to ask for more comprehensive information, particularly in terms of the **five domestic market segments**.

We would also like you to refer us to any other tourism professionals in your region whom we may contact to complete the questionnaire.

Your participation and protection of confidentiality

We wish to assure you that your individual responses will remain strictly confidential. However, your participation in this project is voluntary and you may choose not to participate and may withdraw your consent at any time. Your contribution however is extremely important for the success of the project and for the successful tourism development of your region. **Please respond by 9 November 2012.**

Contact information

Please contact us at the addresses below should you have any questions or concerns regarding this study: Professor Berendien Lubbe at (012) 4204374; e-mail: berendien.lubbe@up.ac.za or Phetsile Fani at (012) 420 4374; email: phetsile.fani@up.ac.za, Fax (012) 420-3349.

Yours faithfully
Prof Berendien Lubbe
Department Tourism Management, University of Pretoria



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GENERAL: INFORMATION OF RESPONDENT

PERSONAL DETAILS:

Title, Name & Surname	
Cell number	
Telephone number (w)	
Telephone number (h)	
E-mail address	

WORK DETAILS:

Organisation/ Institution	
Position/ Job	
Town, Area	
Nr years involved in the tourism industry	Nr years involved in the area

Please indicate the region for which you will be responding to questions (this is the region in which you currently work or of which you have knowledge):

"TOURISM NODE" REGION	TOWNS WITHIN REGION SEE MAPS (as attached to email)	Tick applicable
West Coast, Western Cape	The following areas are included: Swartland, West Coast Peninsula, Bergrivier, Cederberg, Hardeveld and Matzikama – area thus stretches from Malmesbury in the south moving up to Bitterfontein in the north, all the coastal towns and then inland including Wupperthal and van Rhynsdorp.	
Central Karoo, Western Cape	Includes: Laingsburg, Matjiesfontein, Leeu-Gamba, Prince Albert, Beaufort West, Kwa-Mandlenkosii, Merweville.	
Bushbuckridge and surrounding towns, Ehlanzeni district Mpumalanga	This region covers ONLY the following towns and areas: Lydenburg, Sabie, Hazyview, Graskop, Pilgrims Rest and Bushbuckridge district and villages (Excludes Kruger National Park) .	
O R Tambo District, Eastern Cape	Includes: Qumbu, Tsolo, Mthatha, Libode, Ngeleni, Mqanduli, Coffee Bay, Port St. Johns, Lusikisiki, Flagstaff, Mbotyi Resort, Mkambati Reserve.	

We realise that your knowledge and expertise may differ according to your level of involvement in the region or your years of experience in the tourism industry, but your answers remain valuable to us and we request you to please answer all the questions as comprehensively as possible.



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PLEASE ANSWER ALL QUESTIONS ON YOUR SELECTED REGION ONLY.

GENERAL: PROFILE OF TOURISTS

1. Please indicate the approximate number of tourists that travel together when visiting your area.

	Many (More than 60%)	Some (30 – 60%)	Few (Less than 30%)	None	Unsure
1 - 2 people					
3 - 5 people					
6 -10 people					
11-20 people					
21+ people					

2. Please tick the months in terms of your seasonality.

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
High												
Medium												
Low												

3. Please indicate the origin of tourists that visit your area.

	Many (More than 60%)	Some (30 – 60%)	Few (Less than 30%)	None	Unsure
Eastern Cape					
Free State					
Gauteng					
Kwa-Zulu Natal					
Limpopo					
Mpumalanga					
North West province					
Northern Cape					
Western Cape					
Neighbouring and other African countries					
Overseas countries					



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4. Please indicate the characteristics of tourists that visit your area.

	Many (More than 60%)	Some (30 – 60%)	Few (Less than 30%)	None	Unsure
Black					
Coloured					
Indian					
White					
18-24 years					
25-45 years					
Over 45					
Single					
Married no children					
Married with children					
High spenders					
Average spenders					
Low spenders					

5. Please indicate the trip motivations for tourists that visit your area.

	Many (More than 60%)	Some (30 – 60%)	Few (Less than 30%)	None	Unsure
Adventure and sport activities					
Seek social interaction					
Independent exploring					
Escape & relaxation					
Visiting friends & relatives					
Seek cultural and heritage experiences					
Seek educational experiences					
Impromptu (spontaneous) travelling					
Status seeking					
Fine dining					
Going to familiar places					
Well-planned trips					
Attending events					



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TRANSPORTATION

6. Please indicate your answer under each type of transport.

Yes = 1 No = 2 Unsure = 3 Not applicable = 4	Air	Own vehicle	Car Rental	Rail	Minibus Taxis	Intercity Buses	Tour Coaches	Comments
Will more of this type of transport increase tourists to your area?								
Do visitors experience problems with this type of transport TO your area?								
Do visitors experience problems with this type of transport WITHIN your area?								
Is there enough information available on this type of transport TO your area?		4						
Is there enough information available on this type of transport WITHIN your area?		4						
Is there enough promotion of this type of transport?								
Does the cost of this type of transport deter tourists from visiting your area?								
Is it easy to make bookings for this type of transport?		4						

7. Do you believe that airport access to your area is adequate?

Yes	No	Unsure	Comments

8. Please rate the road network in your area on a scale from 1 to 4:

1 = Very bad 2 = Quite bad 3 = Quite good 4 = Very good	National Roads	Tar Roads	Gravel Roads	If you answered 1 or 2 please specify where and what the problems are
General road maintenance				
Accessibility to tourist attractions				



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TOURS

9. GROUP TOURS TO YOUR AREA

Definition: A group tour makes use of the services of a professional tour manager. The tour is a structured programme of sightseeing, meals, transportation and accommodation. The tour consists of a group of people who travel together throughout the trip with a professional tour manager who is in charge of all arrangements.

	Percentage (%)	Unsure
9.1 In your opinion, what percentage of tourists that visit your area are part of organised group tours?		

	Yes	No	Unsure	Comments
9.2 Is product information for group tours adequate to visit your area?				
9.3 Is enough promotion of group tours to your area being done?				
9.4 Does the cost of group tours deter tourists from visiting your area?				
9.5 Are incoming tour operators to your area generally professional?				
9.6 Are roads adequate for tour coaches?				
9.7 Are attractions generally accessible to tour coaches?				
9.8 Is there enough suitable accommodation for group tours in your area in season ?				
9.9 Is there enough suitable accommodation for group tours in your area out of season ?				



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10. LOCAL TOURS WITHIN YOUR REGION

Definition: A local tour is organised and operated in the local region. It could range from a half day general sightseeing tour to an overnight trip in the region.

10.1 Indicate the five most popular types of local tours in your area e.g. one day general sightseeing trips, overnight tours, 4x4 packages, day trips to specific attractions (e.g. rock art), etc. as well as the typical tourists for which this package mainly caters.

List of tours/packages	Specific area	Typical profile of tourists

10.2 Are there enough local tours available in your area to meet the demand of the various market segments?

Yes	No	Unsure	Comments

10.3 Please rate how effectively local tours are promoted to domestic tourists through the following channels, on a scale of 1 – 3:

1 = Not effective at all 2 = Quite effective 3 = Very effective	Rating	Comments
Regional websites		
Travel information centres		
Accommodation establishments		
Tour operators directly		
Traditional media (e.g. radio, billboards)		

10.4 Do you believe it is easy for tourists to book local tours in your area?

Yes	No	Unsure	Comments



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ATTRactions, EVENTS, ACTIVITIES & SPECIAL INTEREST OFFERINGS

11. NATURAL ATTRactions

Definition: A natural attraction is an attraction of exceptional natural beauty and interest (e.g. Table Mountain)

11.1 Please list the **top five natural attractions** in your area in order of importance.

Top five natural attractions
1.
2.
3.
4.
5.

11.2 Indicate whether the above listed **natural attractions** meet the various criteria listed in the table below.

1=Yes 2=No 3=Unsure (Rewrite names of the natural attractions)	Easy accessibility (location)	Accessible to the disabled	Good quality facilities	Included in group tour packages	Safety	Comments
1.						
2.						
3.						
4.						
5.						

11.3 Indicate your view on how each of the above listed **natural attractions** meets the various criteria listed in the table below.

1= Strongly agree 2= Agree 3= Disagree 4= Strongly disagree (Rewrite names of the natural attractions)	Well-managed	Value for money	Customer service	Authenticity	Innovativeness	Educational	Interactivity	Comments
1.								
2.								
3.								
4.								
5.								



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11.4 Please indicate whether the above listed **natural attractions** have the following types of **main experiences** (listed in the table below).

1=Yes 2=No 3=Unsure (Rewrite names of the natural attractions)	Family togetherness	Socialization	Excitement/adventure	Escape/relaxation	Nostalgia	Status	Comments
1.							
2.							
3.							
4.							
5.							

12. MAN-MADE ATTRACTIONS

Definition: Attractions designed and built by man; either specifically for tourism or other reasons (e.g. Gold Reef City or the Union Buildings)

12.1 Please list the **top five man-made attractions** in your area in order of importance.

Top five man-made attractions
1.
2.
3.
4.
5.

12.2 Indicate whether the above listed **man-made attractions** meet the criteria listed in the table below.

1=Yes 2=No 3=Unsure Rewrite names of man-made attractions	Well-managed	Easy accessibility (location)	Accessible to the disabled	Good quality facilities	Included in group tour packages	Safety	Comments
1.							
2.							
3.							
4.							
5.							



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12.3 Indicate your view on how each of the above-listed **man-made attractions** meets the criteria listed in the table below.

1= Strongly agree 2= Agree 3= Disagree 4= Strongly disagree	Value for money	Customer service	Novelty	Authenticity	Innovativeness	Educational	Interactivity	Comments
Rewrite names of man-made attractions								
1.								
2.								
3.								
4.								
5.								

12.4 Please indicate whether these **man-made attractions** have the following types of **main experiences** (listed in the table below).

1=Yes 2=No 3=Unsure	Family togetherness	Socialization	Excitement/ adventure	Escape/ relaxation	Nostalgia	Status	Comments
Rewrite names of man-made attractions							
1.							
2.							
3.							
4.							
5.							

13. EVENTS

Definition: An event is a happening that is non-permanent and that does not necessarily take place regularly (e.g. Grahamstown Festival, Cape Argus Cycle Challenge)

13.1 Please list the **five main events** in your area in order of importance.

Event	Month/s of event	Included in group tour packages		
		Yes	No	Unsure
1.				
2.				
3.				
4.				
5.				



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13.2 Indicate your view on how each of the **main events** meets the criteria listed in the table below.

1= Strongly agree 2= Agree 3= Disagree 4= Strongly disagree (Rewrite names of events)	Novelty	Authenticity	Innovative-ness	Interactivity	Safety	Good service	Value for money	Well-managed	Comments
1.									
2.									
3.									
4.									
5.									

13.3 Please indicate whether these **main events** have the following types of **main experiences** (listed in the table below).

1=Yes 2=No 3=Unsure (Rewrite names of events)	Family togetherness	Socialization	Excitement/adventure	Escape/relaxation	Nostalgia	Status	Comments
1.							
2.							
3.							
4.							
5.							

13.4 Indicate whether the following **types of events** in your area have the **core experiences** listed below?

1=Yes 2=No 3=Unsure	Sport	Cultural	Lifestyle	Religious
Family togetherness				
Socialization				
Excitement				
Escape/relaxation				
Nostalgia				
Status				



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14. To what extent do you think tourism in the area **depends** on the **attractions/events** that you have previously identified?
-
-

15. Do you feel that there are any **major gaps** in terms of the current **attractions** offered in your area? Please elaborate.
-
-

16. Do you feel that there are any **major gaps** in terms of the current **events** offered in your area? Please elaborate.
-
-

17. Please indicate the **most noteworthy activities** that can be found within your region.
(Tick all applicable options for the list below)

Sport		Cultural		Lifestyle		Religious	
4x4		Arts exhibition		Camping		Churches	
Abseiling		Craft market		Casino		Festivals	
Angling		Collecting		Dining		Baptisms	
Ballooning		Cuisine		Food production viewing		Weddings	
Birding		Dancing		Gardens		Funerals	
Bridge swings		Flea market		Photography		Mosques	
Bungy jumping		Theatre		Spa		Pilgrimages	
Canopy tours		Other:		Shopping		Temples	
Fishing				Stokvel		Other:	
Golfing				Wellness centres			
Hiking				Wine tasting			
Horse riding				Other:			
Hunting							
Mountain biking							
Mountaineering							
Quad biking							
River rafting							
Scuba diving							
Skydiving/parachuting							
Surfing							
Yachting							



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Other:

18. Do you think it is easy enough for **potential tourists** to find information about the different attractions, events and activities available in your area? Please explain why/why not.

19. Do you think it is easy enough for **tourists that are already in the destination** to find information about the different attractions, events and activities available in your area? Please explain why/why not.

HOSPITALITY INDUSTRY: ACCOMMODATION

Definition: Accommodation establishment is any facility that regularly (or occasionally) provides 'paid' or 'unpaid' overnight accommodation for tourists comprising of products like hotels, motels, lodges, bed & breakfasts, guesthouses, back packers, caravan parks, camping sites etc.

20. Please list the **top five accommodation establishments** in your area in order of popularity?

Top five accommodation establishments
1.
2.
3.
4.
5.



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21. Please indicate your answer regarding the **offering** of the following **accommodation types**.

1 = Yes 2 = No 3 = Unsure	Sufficient number in area	Accessible location	Availability of all inclusive rates*	Activities on site	Sufficient marketing	Easy booking systems	Included in group tour packages	Comments
5 ★ Hotels								
4 ★ Hotels								
3 ★ Hotels								
Budget Hotels								
Bed & Breakfast/ Guest Houses								
Lodges								
Resorts								
Self-catering Units								
Caravan and Camping								
Hostels and Backpackers								

***Definition: all inclusive rates (Full Board)** - It is a rate charged by accommodation establishments which is all inclusive of accommodation, breakfast, lunch and dinner. Some accommodation establishments may even include services like afternoon tea and special food and beverage offerings.

22. Please rate the **offering** of the following **accommodation types** on a scale from 1-4:

1= Strongly agree 2= Agree 3= Disagree 4= Strongly disagree	Value for money	High quality products	Promotes social interaction	Good service	Safety	Well-managed	Comments
5 ★ Hotels							
4 ★ Hotels							
3 ★ Hotels							
Budget Hotels							
Bed & Breakfast/ Guest Houses							
Lodges							
Resorts							
Self-catering Units							
Caravan and Camping							
Hostels and Backpackers							



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23. Which of the following do you regard as problems in the **accommodation sector**?

	Yes	No	Unsure	Comments
Number of establishments				
Easy to find				
Rates				
Packages				
Booking systems				
Marketing				
Structure/ buildings				
Facilities/ amenities				
Service				
Quality of products				
Restaurants at establishments				
Public areas at establishments				
Sleeping units				
Activities at establishments				
Child facilities				
Electricity				
Cell phone reception				
Training of staff				

24. Are there any **other problems** in the **accommodation sector** in your area?

25. What **advice** can you give the **accommodation sector** to be more successful?



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HOSPITALITY INDUSTRY: FOOD AND BEVERAGE

Definition: Food and beverage - Is the sector/industry that specializes in the conceptualization, the making of, and delivery of food and drink, comprising of restaurants, fast-food outlets and other catering markets. There is a combination of full service, eat on the premises, self-service outlets and take-aways.

26. Please list the **top five food and beverage outlets** in your area in order of popularity.

Top five food and beverage outlets
1.
2.
3.
4.
5.

27. Please indicate your answer regarding the **offering** of the following **food and beverage types**.

1 = Yes 2 = No 3 = Unsure	Sufficient number in area	Accessible location	Close to tourist areas	Child friendly	Offer cultural/local cuisine	Sufficient marketing	Included in group tour packages	Comments
Restaurants								
Fast food outlets								
Public houses (pubs) and bars								
Shebeens and taverns								
Food stalls								
Grocery/ convenience stores								



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31. What **advice** can you give the **food and beverage sector** to be more successful?

GENERAL QUESTIONS

32. In which way do you think your region should be developed to cater better for the needs of the domestic market?

33. Can you refer me to any other person whom you regard as an expert on your area in terms of tourism offerings? Please list and provide contact details if possible.

Please return completed questionnaire via email to: phetsile.fani@up.ac.za or fax to: 012 420-3349

THANK YOU FOR YOUR PARTICIPATION



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APPENDIX 5

EXAMPLE OF TELEPHONE INTERVIEW



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MISS ESTHER STEENS

CLANWILLIAM TOURISM INFORMATION CENTRE

TELEPHONE INTERVIEW

Q7

Several landing strips

- Bushmanskloof 35km
- Clanwilliam
- Biedouw valley 68km
- Lebanon Citrus 15km

Q10

Traditional media is not effective at all. Why? Remember that the market here is totally different than in Cape Town and surrounds. Tours are diminishing within the area as people prefer to travel independently. There are a few people asking about tours at the local info office. The area is accessible for most tourists and therefore they don't need any guidance or tours to get access to any attractions or activities. Even in 2012, there were less tourists than before during the flower tours – it could be that price is a deterrent and that the price of petrol could have influenced the decisions of the domestic travel market.

Q12

The access to the rock art is generally difficult to access, as you have to overcome a few obstacles in order to see the actual rock paintings. Some sites could be adapted to make it more wheelchair friendly in general, but some of these sites are privately owned.

Q16

There have been quite a few events in the area that aided in development of the area, but Clanwilliam needs more. Events on and around the dam seems to be quite popular, such as the Bass classic event (held annually) that also involves local schools and the community. It is therefore quite educational and it seems to be a key in events in order to attract more people. A problem is that it is always the same people organizing these events, so it is always the same and not progressive enough. In 2014, the name Clanwilliam will be 200 years old and there is currently a big debate whether it should be a full year of events and celebration or only one month.

Sufficient 4*/5* hotels?

Yes, there is no need for 4 and 5 star hotels, however, there are enough 4 star guesthouses within Clanwilliam. Clanwilliam already provides a variety of accommodation and there is no need for any additional accommodation. The problem is that accommodation is too expensive within Clanwilliam and since the product is homogenous, there is a huge gap between the actual offering and the price asked for tourists by the various establishments.



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In terms of lodges and game lodges, there are two, at Bushmanskloof and Sandkraal. There are very few enquiries about these. Sandkraal tried to acquire giraffe but the process was hindered by Cape Nature. There is a concern that the game lodges are not able to evolve as they are hindered by Cape Nature. The only tourists enquiring about game lodges (to see the Big 5) are those visiting the area for the popular activity of bouldering (May – October, foreign tourists).

In terms of backpackers and hostels, Clanwilliam has the living landscape project (budget accommodation initiative by University of Cape Town), there are quite a few budget establishments within the area. Clanwilliam receives frequent backpackers and there are sometimes large groups of backpackers and budget explorers that come to the region.

Activities in and around Clanwilliam

Activities that are popular within Clanwilliam mostly involves the dam, but there are sadly no service providers currently as the dam is government owned. Those who partake in activities on and around the dam have their own equipment and is mostly local owners that live around the dam. Activities around the area that tourists engage in are mostly hiking trails and visiting rock-art. There is an art gallery in town but no-one enquires about it. They have exhibitions now and then but it is not really popular. There were horseriding activities but there is not a person that wants to do it permanently (whether it is the working conditions or the salary is debatable).

In terms of facilities on-site, there are no real enquiries as to specific facilities that can be found on accommodation premises. Some tourists ask for child-friendly restaurants, and although most cater for the need of children it is only the Velskoendraai Restaurant/Padstal that caters for children with its own playground.

In terms of Food & Beverage, visitors frequently ask for franchises such as the Wimpy or Spur. When informed that the closest outlets are far away, some visitors actually drive all the way there. Well-know franchises have been proposed many times before, but the idea(s) got shot down as it is competition for the privately owned restaurants. It sometimes feel like the town is run by a “mafia” (said by two respondents) and that they are scared of further development because it will harm their own income. In terms of take-aways, there is one independently owned fast-food shop (McClan) and it is currently popular and well established – previous competition didn’t last longer than a year. It is very difficult in Clanwilliam to establish new businesses!

There is no specific local cuisine, although the local restaurants try to incorporate Rooibos into their products (Rooibos Ltd in town) and some have traditional SA cuisine recipes, such as bobotie. Some also use citrus flavours (from the region) and incorporate it into their menus

How can better value for money be provided? Drop prices! This is so critical and most owners don’t understand that they are TOO EXPENSIVE! There must definitely be price regulation or at least boundaries for pricing for accommodation establishments.

There are no informal outlets such as pubs, bars, shebeens and taverns in town. Some restaurants offer a “pub” area but they are not operating independently. Shebeens are only located in the informal settlements.



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How can the service and quality of food and beverage establishments be improved? The service in the establishments of Clanwilliam is quite above average when compared to the rest of the area. Most training is done by the owners of the respective establishments.

Government involvement to evolve skills: Clanwilliam hosted the SAHost workshop recently. There are also many training courses that are presented locally by West Coast Tourism – however, transport is a major issue and it is preferred if the training could be done within the smaller areas instead of the region. There is quite an interest in further skill training and development and the owners are willing to pay to attend this training (e.g. workshops). It is quite popular as these workshops are always overbooked. Owners are also willing to pay for the skill development of their employees where they can't provide the training (e.g. Clanwilliam Lodge had a trainer to improve the skills of housekeeping staff).

It seems like the most important element is the packaging of offerings within Clanwilliam and the area – unfortunately most service providers don't understand this concept. It is the only way that tourism and expenditure can be improved. It feels like the "inland" areas are competing against the "coastal" areas and the key to attract more tourists is to include everyone in marketing the region as a whole. Establishing a circular route could help to include both areas (travel to the North on a specific route along the coast and then back South on a specific route within the inland). Attending the INDABA doesn't help much as there is no "product" that can be sold – only when the whole area can sell a specific package to e.g. tour operators can attendance at the INDABA be deemed as "successful". It is very difficult as a tourism information office to do this alone. The cost of marketing is also severely high and tourism offices don't have the funds available to market areas, and it would certainly not help if they only marketed themselves as information offices. It has been proposed that various establishments should all buy into an article to be published in travel magazines about the area, and then the different establishments that are funding the article could advertise themselves in such a way. Unfortunately, marketing has become a very big issue for tourism within the area and the region.

It seems like everyone within the region struggles under the influence of Saldanha Bay Tourism Organisation. The communication processes within the entire West Coast is too extensive and too complicated and no work is getting done as no-one wants to deal with the hassle of correspondence. Therefore, most local offices have become non-responsive. The problem here is that "no-one wants to share what they have"!

FIVE DOMESTIC MARKET SEGMENTS

Which is most suitable for further development?

There are some segments that can already be found within the area. However, it could be very lucrative to have the "Well to do Mzansi families" or "The New Horizon families" within the area. There are currently not many Black or Indian visitors to the area. Perhaps Clanwilliam is too far away from Cape Town to attract these local markets, as it falls just outside the 200km radius for breakaways. Also, the improvement of the N7 hinders tourism within the area as people from the Western Cape would rather opt for a destination where there's no hassle with transport or roads. Because they want tailored trips maybe Clanwilliam will be a good area for them as tourists that come here are mostly independent travellers.



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What is lacking in order to attract this market?

The main gap here is definitely activities. There needs to be more activities at the dam area and facilities for everyone to use and enjoy. This is not currently the case. People want to swim and canoe, but there are no canoes available for rent! The dam is owned by the municipality, and they don't provide any extras (tourists head to Rondeberg oord, a private resort; they have water-based activities). Most activities within and outside Clanwilliam happens outside, so maybe they could develop those activities. There are almost no activities in town currently.

Rank the remaining segments from most suitable to least suitable.

After Well-to-do Mzansi and New Horizon families, it should be spontaneous budget explorers. High-life enthusiasts and seasoned leisure travellers should join least suited to the area.



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APPENDIX 6

ETHICAL CLEARANCE



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UNIVERSITEIT VAN PRETORIA
UNIVERSITY OF PRETORIA
YUNIBESITHI YA PRETORIA

FACULTY OF ECONOMIC AND
MANAGEMENT SCIENCES

RESEARCH ETHICS COMMITTEE

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29 October 2012

Strictly confidential

Prof BA Lubbe
Department of Tourism Management

Dear Professor Lubbe

Project: *National Department of Tourism:
Analysis of the supply of tourism products for the five key
domestic segments*
Researcher: Prof BA Lubbe e.a.
Student No: -
Supervisor: -
Department: Department of Tourism Management

Thank you for the application you submitted to the Committee for Research Ethics, Faculty of Economic and Management Sciences.

We kindly note the inclusion of primary data collection in your research project referred to above.

We wish you well with this important project.

We apologise for the incorrect name in our letter of approval dated 22 October 2012.

Sincerely

PROF AF GROBLER
CHAIR: COMMITTEE FOR RESEARCH ETHICS

cc: Mr CV Francis

Members: Prof AF Grobler (Chair); Prof BA Lubbe; Prof HE Brand; Prof CJ Kruger; Prof JH Hall; Prof JH Kirsten; Prof JE Myburgh; Ms K Plant; Prof M Stiglingh; Prof C Thornhill; Prof R van Eyden; Prof SR van Jaarsveld; Prof JJ van Vuuren; Dr M Wiese
Administrative officer: Mr M Deyssel



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