

CHAPTER 1: ORIENTATION

1.1 Introduction

Travel and tourism continue to be one of the world's highest priority industries and employers (World Travel and Tourism Council, 2006). It is increasingly recognized that tourism is important for environmental, cultural and social awareness, pursuit of peace and international cooperation, and in particular its ability to alleviate poverty through the creation of small and medium-sized tourism businesses and new jobs (Conrad & Barreto, 2005:22). The tourism industry is dynamic and has been undergoing rapid change in the last two decades (Poon, 2003). Numerous global lifestyle and travel trends impact the nature of the industry. Poon (2003) suggests that more demanding and sophisticated consumers, coupled with information technology such as the Internet, have driven transformation. Consequently tourism has changed from mass, standardized product options to more customized niche product offerings (Novelli, 2004).

Following the democratic elections of April 1994, tourism has become one of South Africa's fastest growing industries and plays an increasingly important role in the South African economy. Tourism now contributes more to the South African gross domestic product (GDP) than the gold mining industry at R35.3bn per annum (Fair Trade in Tourism, 2005). The tourism industry employs 3,5% of all South Africans and contributes R124,02 billion to the South African economy (WTTC, 2005). The number of foreign tourists visiting South Africa has more than doubled since 1994, from less than 3 million visitors to a record 7,4 million people in 2005 (SAT, 2006).

In 2005, African visitors accounted for 72% of all foreign arrivals, followed by those from Europe, who contributed 18% of all arrivals. It is estimated that South Africa's revenue from foreign tourism was R55 billion in 2004, with R30,1 billion coming from overseas visitors, R20 billion from African land visitors and R4,7 billion from African visitors arriving by air. It is evident that spending by African visitors is small in comparison to that of European, American and Asian visitors. Whilst total international tourist arrivals in South Africa increased by 10,3% in 2005, visitors from Europe only increased by 1,7%

whilst Asian figures declined by 1,6%. This is a concerning trend as visitors from Europe, Asia and America are responsible for the majority of revenue earned (Gilmour, 2006).

The mandate for tourism as outlined in the South African Tourism Act is that tourism must contribute to the gross national product, create jobs, alleviate poverty and improve redistribution and transformation of our economy and society. South African Tourism (SAT) is the national agency responsible for the international marketing of South Africa as a preferred destination (Gilmour, 2006). Its vision is for South Africa to be the preferred tourist destination in the world, in order to maximize the economic potential of tourism for the country and its people. SAT's budget and resources, especially when viewed in the context of many of its major competitors, are limited (SAT, 2004), and demand creative and intelligent strategies for success. A consistent brand South Africa image is also needed to create a strategic advantage for South Africa in an increasingly competitive marketplace.

The International Marketing Council of South Africa (IMC), which is responsible for creating a consolidated brand image for South Africa, actively promotes South Africa's scenic beauty, magnificent outdoors, sunny climate and cultural diversity to establish and enhance Brand South Africa (International Marketing Council, 2004). It markets the country as highly diverse in terms of its climate, culture, tourist activities and infrastructure, thereby catering for virtually every tourist niche, from ecotourism and cultural tourism through to adventure, sport and paleo-tourism. It advocates the country's diverse terrain which, together with its ideal climate for outdoor activities, makes it an ideal hunting ground for adrenaline seekers. This sentiment is strongly supported by the South African government (South African Government Information, 2002), which has identified ecological tourism, including adventure tourism, as the fastest growing tourism segment. In 2005, South Africa was named the 6th most popular adventure tourism destination by iExplore.com, America's foremost online sellers of adventure and experiential travel. South Africa was one of the biggest movers and climbed seven places ahead of countries like New Zealand and Morocco (iExplore, 2005). President Thabo Mbeki quoted this achievement in his "Weekly letter from the President" (ANC Today, 2006). He believes that this improvement is based not only on

the promise of the brand image and the resultant expectation, but fundamentally what the country has achieved. Whilst he acknowledges the positive brand image, he reminds us that great care should be taken not to conduct an attractive advertising campaign only to find that we do not deliver on the brand promise.

Adventure tourism is a form of niche tourism that can mean different things to different groups of participants. It can be defined as a trip or travel with the specific purpose of activity participation to explore a new experience, often involving perceived risk or controlled danger associated with personal challenges, in a natural environment or exotic outdoor setting (Sung et al., 2000). Adventure tourism can be associated with a leisure activity that takes place in an unusual, exotic, remote or wilderness area. Adventure travellers expect to experience varying degrees of risk, excitement and tranquillity and to be personally tested. In particular, they are explorers of unspoilt exotic parts of the planet and also seek personal challenges (Novelli, 2004:204).

Adventure tourism has been recognized as one of the fastest growing travel market segments and has broadened its scope and appeal in international travel and tourism. Although it is one of the fastest growing, it is also one of the least understood forms of international tourism (Zurick, 1992). The variety and availability of adventure travel products appear to be limitless (Sung et al, 2000). An Australian research study undertaken by Tourism Queensland found that adventure tourism is one of the largest sectors of the Australian tourism industry and is also showing some of the highest growth rates. Of the 200,4 million American adults in 2000, 15,7 million (8%) claimed to be hard outdoor adventure enthusiasts, whilst 35,5 million (18%) claimed to be soft outdoor adventure enthusiasts (Canadian Tourism Commission, 2005). Whilst South Africa has enormous potential for adventure tourism, this sector is fast becoming highly competitive with many countries competing for a share. In today's highly competitive market it is important for tourism marketers to meet the needs of increasingly sophisticated consumers who are more knowledgeable and demanding in their choice of tourism products. For the South African adventure travel product to grow and prosper, it needs the support of SAT to successfully market and promote the industry to the appropriate target market.

According to SAT, South African tourism benchmarks its performance against key competitors, in particular Australia (SAT, 2004). The Australian Tourism White Paper states that building successful niche markets is central to growing high-yield sectors and addressing seasonality. Tourism Victoria reports that Australia received approximately 1,5 million international adventure travellers (60 million visitor nights) and 16 million domestic overnight adventure visitors (86 million visitor nights) in 2004 (Tourism Queensland, 2004).

To develop an effective South African adventure travel industry, greater insights are needed into the needs of the adventure traveller as well as the structure of the industry. Strategies and marketing practices must be based on knowledge of motivations and expectations of consumers. It is also important to gain knowledge about activities and best practices of key competitors that support an adventure travel industry.

1.2 Purpose of this Research

The primary purpose of this study was to determine if SAT is taking a leadership role in establishing a competitive adventure travel industry. The study also attempts to determine best practices of NTOs to establish a competitive adventure travel industry.

An exploratory study was conducted into the activities and best practices of competitive NTOs that potentially contribute to the establishment and growth of an adventure travel industry. Research was then conducted amongst South African adventure travel service providers to determine their perceptions about the role and initiatives performed by SAT to establish a long-term viable and competitive adventure tourism industry.

1.3 Statement of the Problem and Subproblems

Main research problem: Is South African Tourism (SAT) giving enough support for the establishment of a competitive adventure travel industry?

Subproblem 1: To determine what best practices and activities are being undertaken by national tourism organizations to establish a competitive adventure tourism industry.

Subproblem 2: To determine whether South African adventure travel service providers believe they are being adequately supported by SAT to ensure a competitive adventure travel industry.

1.4 Assumptions of the Study

The study assumes that an adequate infrastructure is in place that supports a growing tourism industry. It is assumed that adventure tourism will be viable based on the experience of ecotourism in South Africa, which is seen as positive. Parties that are directly involved in a nature-based tourism experience, such as the national and provincial parks, as well as private game reserves, are now including the concept of involving and benefiting local communities in their mission statements. Similarly, the need for thorough planning and impact studies is being emphasized through publicity given to mining projects in ecologically sensitive areas. Conservation and careful management of scarce resources is increasingly becoming a priority (Discover our Drakensberg).

1.5 Delimitations of the Study

The study of activities and best practices of NTOs is limited to information available in the public domain.

It is important to note that the South African adventure travel industry is highly fragmented, consisting of many small entrepreneurial companies. This may contribute to the difficulty of getting a consolidated opinion.

Limited research has been undertaken in this field. Sung (2000) found that despite its growing popularity and gaining recognition as one of the fastest growing segments in the international travel and tourism industry, adventure tourism has hardly been a topic of empirical research in travel and tourism studies.

1.6 Importance of the Study

Vogt (2005) suggests that niche markets that create excitement and challenge for travellers will continue to earn travel budgets. This study of adventure travel will provide insight to travel operators, destinations and ultimately consumers who travel for physically, mentally and culturally exciting experiences.

It is evident that with the necessary initiatives in place, adventure travel could contribute significantly to the growth of total tourism in South Africa, as well as enhance the overall image and value of Brand South Africa.

As the adventure travel industry grows, competition will increase significantly amongst countries and destinations. The study could identify initiatives needed by SAT to ensure that South Africa becomes a serious contender when selecting an adventure travel destination.

1.7 Plan of the Study

A brief discussion of the content of each chapter is supplied.

Chapter 1 – ORIENTATION: In this chapter, the intention and purpose of the study are discussed. The research problem, assumptions of the study, delimitations and the importance of the study are outlined.

Chapter 2 - FOUNDATION OF THE STUDY: This chapter focuses on a tourism management model to demonstrate the role and relation of an NTO vis-à-vis other components of the tourism system.

Chapter 3 - LITERATURE REVIEW: This chapter comprises an analysis and discussion of the tourism industry, trends influencing tourism, adventure travel and NTOs. It contains explanations of key terms, key concepts and constructs regarding adventure tourism.

Chapter 4 – BEST PRACTICE ANALYSIS: This chapter contains a summary of activities and best practices of competitive NTOs as determined in the exploratory research study. The competitive NTOs that were evaluated are the Canadian Tourism Commission, Tourism Australia and Tourism New Zealand. A critical examination of their respective websites and government policies was undertaken. The best practices and activities studied include market research, destination branding, marketing and promotional activities, booking facilitation and strategic partnership facilitation. In conclusion the chapter compares the level of activity performed by competitive NTOs to that of SAT.

Chapter 5 – RESEARCH DESIGN AND METHODOLOGY: This chapter describes the research design and methodology used. The approach followed and the types of primary and secondary data collected are discussed in detail. Data collection and the questionnaire development are also explained.

Chapter 6 – RESULTS AND DATA ANALYSIS: This chapter contains an analysis and summary of research results. The findings are presented in the form of charts.

Chapter 7 – CONCLUSIONS AND RECOMMENDATIONS: The findings and conclusions are discussed with recommendations.

CHAPTER 2: FOUNDATION OF THE STUDY

2.1 Introduction

A tourism system is fundamentally based on the interrelationship between the tourist and the tourist destination and all those factors that link or affect these two elements.

Tourism is composed of both a supply (industry) and demand (an activity) side, and the supply and demand are linked through marketing, distribution, global and national tourism organizations and transportation (Lubbe, 2005). Both the supply and demand sides are influenced by changes in the macro environment.

2.2 Tourism Management Model

Lubbe (2005) suggests a tourism management model that demonstrates how all components relate to each other as well as emphasizes the interdependence. This model shows that tourists are driven by particular needs and motivations to travel. Once a decision has been made to travel, decisions on how, when and where become relevant. A destination must cater for the changing demands of tourists whilst at the same time retain and sustain its cultural and natural heritage, which always remains its core attraction.

For a destination to be accessible to tourists, two types of linkages are needed – firstly, a spatial gap that requires the tourist to be transported to the destination and secondly, a functional gap that requires the fulfilment of a number of activities, such as entry documentation, reservations and currency.

The macro environment continuously influences how and where people travel. Tourism marketers will attempt to use the environment to facilitate and enable tourism to grow effectively. Through destination marketing, policy and legislation, the establishment of organizations to represent the tourism industry and research, coordination is achieved.

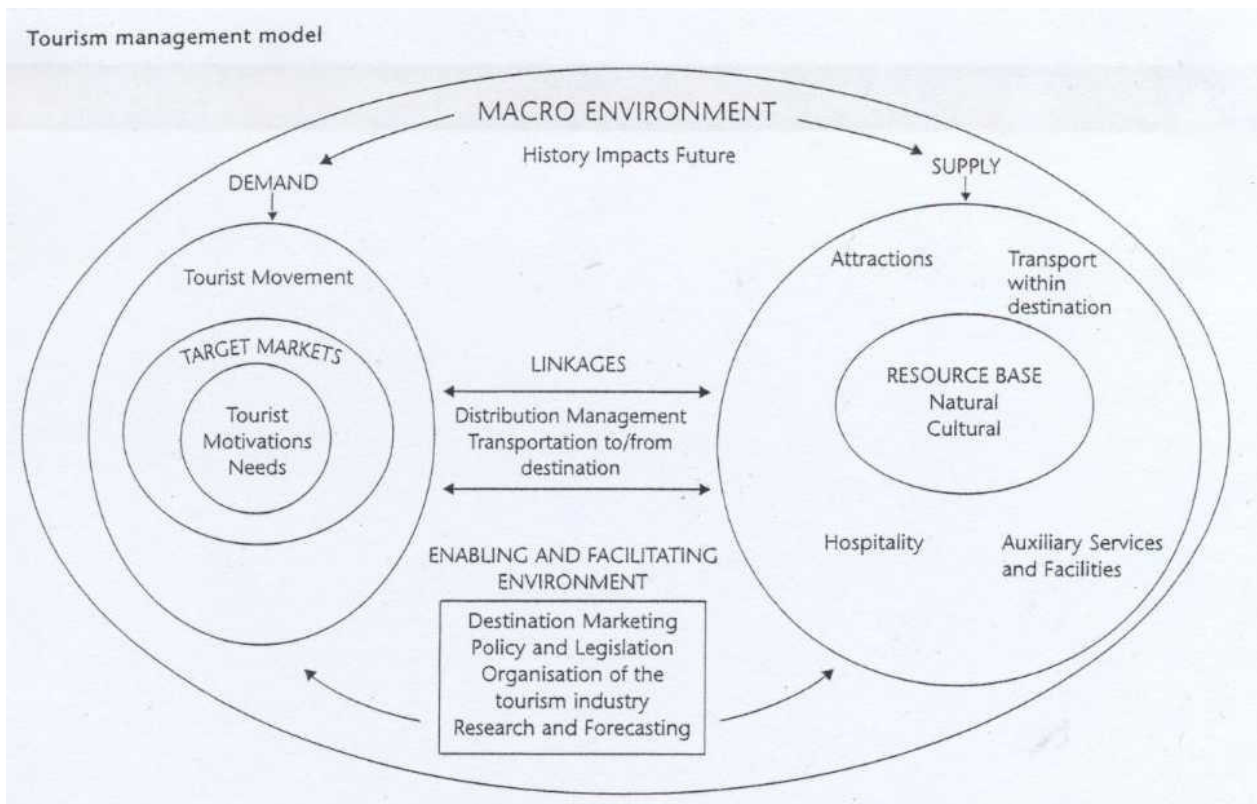


Figure 2.1: Tourism management model

Source: Tourism management in South Africa (Lubbe, 2005)

The majority of tourism is dependent on private sector initiatives, with most operators being small and medium-sized enterprises. Because the global tourism sector is very fragmented and firms compete for business, cooperation between them does not come naturally. Because there are many players in the tourism industry, standards vary greatly. For a country to be successful in developing a sustainable tourism industry, governments need to implement a regulatory and support framework (Conrad & Barreto, 2005).

The focus of this study is on the support role that NTOs play in destination marketing, specifically evaluating their role in facilitating the establishment and growth of an adventure tourism industry.

The World Tourism Organization defines an NTO as an autonomous body of public, semi-public or private status, established or recognized by the state as a body with competence at a national level for the promotion – or in some cases, marketing – of inbound international tourism. Swarbrooke et al. (2003) observe that adventure marketing is undertaken by NTOs that have little control over the product, pricing or distribution. Destination marketing agencies therefore mostly focus on one element of the marketing mix that they can influence, namely promotion.

The body that has been charged by government with promoting tourism to South Africa is South African Tourism (SAT). Its vision is for South Africa to be the preferred tourist destination in the world, to maximize the economic potential of tourism for the country and its people. In order to achieve its objective, SAT suggests it needs to develop and implement a world-class international tourism marketing strategy for South Africa. To do this, it has undertaken to facilitate the strategic alignment of the provinces and industry in support of the global marketing of tourism to South Africa, remove all obstacles to tourism growth, build a tourist-friendly nation and ensure that tourism benefits all South Africans. SAT markets the country's scenic beauty, diverse wildlife, kaleidoscope of cultures and heritages, the great outdoors, sport and adventure opportunities, ecotourism and conference facilities. Marketing is undertaken via its international offices in strategic markets worldwide. SAT participates in travel shows, presents workshops for members of the travel trade, produces a variety of promotional material and initiates and coordinates marketing campaigns to create a positive marketing climate for the effective marketing of South Africa's many excellent tourism products (SAT, 2006).

South Africa's resource base for tourism is phenomenal. From an ecological perspective, immensely rich species diversity is found in South Africa. Southern Africa has 582 national parks and nature reserves covering 6% of the region. More than 90% of the region's birds, mammals, amphibians and reptiles are found in this network of protected areas. It has a land surface area of 1,1 million km² - representing just 1% of the earth's total land surface – yet South Africa contains almost 10% of the world's total known bird, fish and plant species, and over 6% of the world's mammal and reptile species. The country's tourism attractiveness lies in its diversity (Delta Environmental Centre, 2006). Some of the features which make South Africa an attractive tourism

proposition include accessible wildlife, varied and impressive scenery, unspoiled wilderness areas, diverse cultures, generally sunny and hot climate, no 'jet lag' from Europe, a well-developed infrastructure and virtually unlimited opportunities for special interest activities such as whale-watching, wild water rafting, hiking, bird-watching, bush survival, deep-sea fishing, hunting and diving. South Africa can be positioned an almost complete tourist destination (Republic of South Africa, 1996).

For a tourism system to function optimally, it is dependent on many substeams. This study will focus on the interrelationship between NTO's and adventure travel service providers.

CHAPTER 3: LITERATURE REVIEW

3.1 The World Travel and Tourism Industry

Travel and tourism encompassing transport, accommodation, catering, recreation and services for visitors is one of the world's highest priority industries and employers. According to the World Travel and Tourism Council (WTTC), tourism is expected to generate US\$6 477,2 billion of economic activity in 2006 growing (in nominal terms) to US\$12 118,6 billion by 2016. Globally the total travel industry is expected to grow by 4,2% per annum in real terms between 2007 and 2016. It is estimated that the travel industry employs 234 305 000 people, or one in every 11,5 jobs in the world (WTTC, 2006).

Tourists can be classified as people who "travel to and stay in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited" (WTO, 2005).

International tourist arrivals reached an all-time record of 763 million in 2004. Europe accounted for 52% of all international travel, the Americas 21%, Asia and the Pacific 20%, and Africa and the Middle East around 3% each. The majority of international tourists (52%) travel for the purpose of leisure, recreation and holidays. Business travel accounts for some 16%, whilst the remainder travel for other motives such as visiting friends and relatives, religious purposes and health treatment (WTO, 2005).

It is estimated that by 2020, three times as many people will travel as today (Conrad & Barreto, 2005). The World Tourism Organization (WTO) estimates that 1,6 billion tourists will be visiting foreign countries annually and receipts from their travel are expected to reach \$2 trillion. Developing countries are recognizing the tourism sector's potential contribution to national development goals, particularly by creating employment opportunities, stimulating small business and reducing poverty. With the weakening of trade preferences and special pricing arrangements, many countries' dependence on tourism continues to grow as traditional productive sectors, such as agriculture and

manufacturing industries, struggle against tough external competition (Conrad & Barreto, 2005:22).

Today tourism, via the concept of ecotourism, is viewed perhaps more than any other global industry as a tool for both conservation and local community development. At the United Nations World Ecotourism Summit, the signed Quebec Declaration states the following: "Ecotourism embraces the principles of sustainable tourism, concerning the economic, social, and environmental impacts of tourism." It goes on to affirm that "different forms of tourism, especially Ecotourism, if managed in a sustainable manner, can represent a valuable economic opportunity for local and indigenous populations and their cultures and for the conservation and sustainable use of nature for future generations" (United Nations Environment Programme, 2006).

3.2 South African Tourism Industry

Since the democratic transition in 1994, tourism has become recognized as an increasingly important sector for the South African economy and for achieving government goals for reconstruction and development. South Africa's belated entry into the global tourism system underpinned an initial lag between tourism growth and appropriate national government policy frameworks to steer such expansion to attain broadly defined development goals such as economic growth and transformation objectives (Visser & Rogerson, 2004:201).

Since then the Department of Environmental Affairs and Tourism has published the National White Paper on the Development and Promotion of Tourism in South Africa (1996), Tourism in Gear (1998) and Responsible Tourism Guidelines (2002, 2003). The policy documents recognize the importance of tourism, identify the obstacles that hinder the success of tourism and provide pointers to develop a new tourism economy through the promotion of responsible tourism. Responsible tourism implies a proactive approach by tourism industry partners to develop, market and manage the tourism industry in a responsible manner, to create a competitive advantage. The fundamentally changed policy environment has laid the foundation for an emerging tourism system that is developmental in focus.

One of the constraints pointed out in the Tourism White Paper is a myopic private sector. Many tourism establishments tend to have a rather limited view of the product they offer - only goods and services within their four walls. It is only through taking a broader view of the product offered and building partnerships with the government, local communities and other private sector interests that the highest levels of customer satisfaction can be achieved.

International tourism to South Africa has surged to new record levels, with 10,3% more foreigners visiting the country in 2005 than in 2004 (SAT, 2006). Some 7,4 million people from other countries visited SA last year, up on the previous year's figure of 6,7 million. The highest increase was in tourists from elsewhere in Africa, with 5,4 million visitors - 15,8% more than in 2004. Tourists from North America increased by 11,8% to 274 281, and those from Central and South America by 5,6% to 47 818. Figures from Europe grew by 1,7%; Europeans continue to see South Africa as a destination of choice, with 1,3 million of them visiting the country. The total from Australia and New Zealand was 95 818, a 3% increase over 2004. Another large increase was in the number of visitors from the Middle East, which rose by 6% to 33 551. Asia saw the only decline, with a -1,6% drop to 179 112 (Financial Mail, 2006). The mix of foreign tourists is an important issue as it is estimated that the majority of income from foreign tourists is derived from hard currency countries such as the USA and Europe.

It is estimated that tourism contributes 8,2% to the South African GDP, whilst employing approximately 1,1m people (WTO, 2005). The WTO estimated that in 2006, tourism would contribute 10,3% to the GDP of the world economy, 12,2% to the Australian economy, 17,8% to the Spanish economy, 14,3% to Thailand's economy and 15% to the Egyptian economy (see Table 3.1).

Table 3.1: Tourism's contribution to GDP

	Thailand	New Zealand	Egypt	Peru	Australia	SA
GDP contribution (US\$ millions)	40 505,3	22 509,2	18 878,5	7 698,7	118 470,2	28 450,1

% of GDP	14,3	15,4	15	7,7	12,2	8,2
Jobs (000's)	3.820	0.326	2.472	0.740	1.287	1.083
% of total employment	10,7	15,9	12,6	7,1	12,8	7,5
Growth (2006)	6,2%	4,5%	5,4%	6,1%	3,6%	6,5%
Long-term growth forecast (10 years)	5,8%	4,3%	5,7%	4,4%	4,2%	4,8%
Absolute size worldwide	25	42	43	62	11	37
Relative growth to national economies	60	46	50	127	66	111
Number in long-term (10 years) growth	27	112	30	100	115	71

Source: Adapted from WTO (2005)

From the above table, it is evident that tourism's contribution to the South African economy is still relatively low by world standards. Key actions, policies and strategies are necessary to ensure that South Africa realizes its tourism potential as well as avoids the mistakes that other destinations have made.

3.3 Competitiveness

Competitiveness can be described as the ability to achieve success in markets leading to better standards of living for all. A way of making a nation's products more attractive in world markets is to innovate and improve quality in products and production processes (Library of Economics and Liberty, 1999).

The WTTC publishes a competitiveness monitor (WTTC, 2004) that tracks a wide range of information, indicating the extent to which a country offers a competitive environment for travel and tourism development. The monitor aims to stimulate policy-makers,

industry investors, academics and all other interested parties to recognize the crucial role they play in maximizing the contribution of travel and tourism for the benefit of everyone and to ensure that the development of the industry is sustainable. Information provided by the competitiveness monitor is shown in Table 3.2.

Table 3.2: WTTC competitiveness monitor

South Africa	Index Value	Ranking
Price competitiveness	88	7
Human tourism	40	48
Infrastructure	52	66
Environment	50	93
Technology	53	93
Human resources	51	90
Openness	72	34
Social	36	126

Source: WTTC (2004)

The data presented above has been recalibrated so that comparison across countries can be made. In terms of the index the least competitive is 0 and the most competitive is 100. With the ranking the most competitive number is 1 and the least competitive number is 212.

From the above data, it is clear that South Africa needs to improve its competitiveness ranking to ensure a sustainable tourism industry. Of particular concern for adventure travel in South Africa is the low ranking that South Africa scores on the environment and human tourism dimension. The environment index combines the population density index, CO2 emission index and the environmental treaties index. The human tourism

index measures the achievement of human development in terms of tourism activity. It is a new index and is in line with various kinds of human development indices constructed by the United Nations' development programme to measure human achievement in various aspects of human development. The human tourism index is calculated by taking the average of the tourism participation index and the tourism impact index (WTTC, 2004).

Tourism is a fiercely competitive business. For tourism destinations the world over, as indeed for South Africa, competitive advantage is driven by science, technology, information and innovation (Lubbe, 2005). As such, it is not simply the stock of natural resources of South Africa that will determine the competitiveness in tourism, but rather how these resources are managed and to what extent they are complemented with man-made innovations.

3.4 Trends influencing Leisure and Travel

The tourism industry is affected by numerous global lifestyle and travel trends. Over the last few years, society has witnessed numerous changes in consumer behaviour. Trends that have clearly impacted on holiday-taking behaviour include a move to a healthier lifestyle, heightened awareness of environmental issues, a more quality-conscious consumer and the role of leisure in people's lives. Traditional distribution channels are increasingly being bypassed, homogeneous group holiday experiences are being shunned, booking lead times have shortened, an increasing trend to contact the supplier directly is developing, personal satisfaction and experiences are becoming more important and increasingly the customer is becoming more independent, involved and discriminatory in the itinerary planning processes (King, 2001).

A number of reasons have been advanced for these changes. Certainly the increasing travel experience of many travellers is a factor, as is the increased consumer control provided by technology advancements and fundamental changes within our society (Poon, 2003). Naisbitt (1994) advances the prediction that "the more universal we become, the more tribal we act. The bigger and more competitive travel becomes, the

more authentically distinctive to tourists we will make our cultures. The more we integrate the world, the more we differentiate our experiences”.

In other words, the more homogeneous our world becomes, the greater the need to provide a counter or balance through tourism. The motivations and reasons for travelling are clearly changing.

These trends must be kept at the forefront when developing strategies to attract international tourists. Recent studies in trends that influence travel are summarized below.

YESAWITCH (2000)

Ten trends shaping the future of leisure travel

- Unexpected affluence
- Time poverty
- The pursuit of pleasure
- Need for new and different experiences
- Technogeneration
- Inclusive pricing
- Closer to home
- Active vacations
- Alternative accommodation
- Strategic control

BONIFACE (2000)

Signs of change towards dynamic tourism

- Information, creativity and experience
- Spirituality and nourishment: holism, nature and simplicity
- New transport – greenness, walking and cycling
- Peace and tolerance
- Flexibility

- Protecting, conserving, sustaining
- Guiding principles to tourism supply
- Plenty of options and excellent information

POON (2003)

New tourism

Supplier trends

- Cheaper, shorter, faster
- Closer to home
- Internet helps customize holidays without raising costs
- Increased polarization (e.g. mega/micro, luxury/budget, safe/unsafe) with less middle ground
- Travel agents are reinventing themselves

Consumer trends

- Maturing, educated travellers
- Independent travellers
- Rise of the "bourgeois bohemians" who spend freely for uplifting experiences
- Travellers seek to nourish body, mind and soul
- Value for money

Destination trends

- Enough is enough - move away from mass tourism development to more sustainable models that preserve environment and culture
- Travellers are moving away from products towards experiences

Source: Adapted from studies by Yesawitch (2000); Boniface (2000) and Poon (2003).

Brown (1998) indicates that much has been made of “new tourism”. Markets have become more segmented, packages more flexible, independent travel more common and tourists more independent. Demographic and social changes in developing countries are resulting in new markets that are influencing supply. Advancement in information technology is facilitating new developments. The international tourism industry has been undergoing rapid transformation driven largely by experienced and demanding consumers on the one hand, and by information technologies on the other (Poon, 2003). Information technologies have brought products directly to the homes of the customers and threaten the survival of travel agencies and even tour operators. From mass, standardized and rigidly packaged hotels, holidays and tourists, a new industry of holiday flexibility, product segmentation and sustainability is emerging. The growing experience, maturity, independence and sophistication of the consumer and the dominance of consumer influence on the market are major factors changing the travel and tourism industry. An important element of this change has been the demand by consumers for cleaner, greener and more sustainable tourism services, products and experiences (Poon, 2003).

As described by Novelli (2004), for destination managers and planners seeking to utilize tourism as a mechanism for economic development, the niche tourism approach appears to offer greater opportunities and a tourism that is more sustainable, less damaging and, more importantly, more capable of delivering high-spending tourists.

At their highest level tourism activities can be divided into two categories, namely mass tourism and niche tourism. Mass tourism is conventional tourism that involves a large number of tourists in staged settings, whilst niche tourism can be described as special interest, culture and/or activity based tourism involving a smaller number of tourists in authentic settings. It is possible to identify a variety of micro-niches emerging from the most appealing and vibrant characteristics, locations of destinations and specific tourist interests (Novelli, 2004:9).

Table 3.3: Niche tourism: Micro-niches

NICHE TOURISM				
Micro-niches				
CULTURAL	ENVIRONMENTAL	RURAL	URBAN	OTHERS
Heritage	Nature and wildlife	Farms/barns	Business	Photographic
Tribal	Ecotourism	Camping	Conference	Small cruise
Religious	Adventure	Wine	Exhibition	Volunteer
Educational	Alpine	Gastronomy	Sport	Dark
Genealogy	Geotourism	Sport	Gallery	Youth
Research	Coastal	Festival/events	Art	Transport
		Arts and crafts		

Source: Adapted from Novelli (2004)

3.5 Adventure Travel

Adventure tourism is a broad concept that involves a wide range of activities and people. A definition may depend very much on participants' perception of the situation and of their own characteristics - therefore adventure is subjective and unique to each person.

Adventure is not passive; it involves some form of action. The engagement can be on a physical, emotional, intellectual or spiritual level. Carer (2000) suggests that adventure tourism is fundamentally about active recreation participation, and it demands new metaphors based on "being, doing, touching and seeing" rather than just seeing. Millington et al. (2001:67) describe adventure travel as a "leisure activity that takes place in an unusual, exotic, remote or wilderness destination. It tends to be associated with high levels of activity by the participant, most of it outdoors. Adventure travellers expect to experience various level of risk, excitement and tranquillity, and be personally tested. In particular they are explorers of unspoilt, exotic parts of the planet and also seek personal experiences".

Adventure recreation activities are essentially non-utilitarian and provide intense, positive intrinsically enjoyable experiences to participants. According to Ewert and Hollenhorst (1997), adventure travel goes beyond the traditional set of benefits described by leisure experiences, i.e. physical exercise. Adventure experiences are a means to crystallize selfhood through personal testing, provide life meaning and perspective, confer awareness of one's own mortality, reduce anxiety and improve fear-coping mechanisms.

Sung (2000) argues that the elements of risk and performance are unique to adventure tourism, making it distinct from nature tourism and ecotourism. Adventure travel is commonly considered as part of or closely allied to ecotourism and nature-based tourism. Ecotourism is a nature-based form of specialty travel defined by The International Ecotourism Society (TIES, 2006) as "responsible travel to natural areas, which conserves the environment and sustains the well-being of local people". The WTO (2005) states that ecotourism and nature-related forms of tourism account for more than 20% of total international travel.

Whilst there is agreement that nature tourism, ecotourism and adventure tourism are interrelated, the three are not identical. As a result, a new definition of adventure travel is proposed as: A trip or travel with the specific purpose of activity participation to explore a new experience, often involving perceived risk or controlled danger associated with personal challenges, in a natural environment or exotic outdoor setting (Sung et al., 2000).

Sung (2000) suggests a conceptual diagram illustrating the commonalities and differences as a basis for a more systematic investigation.

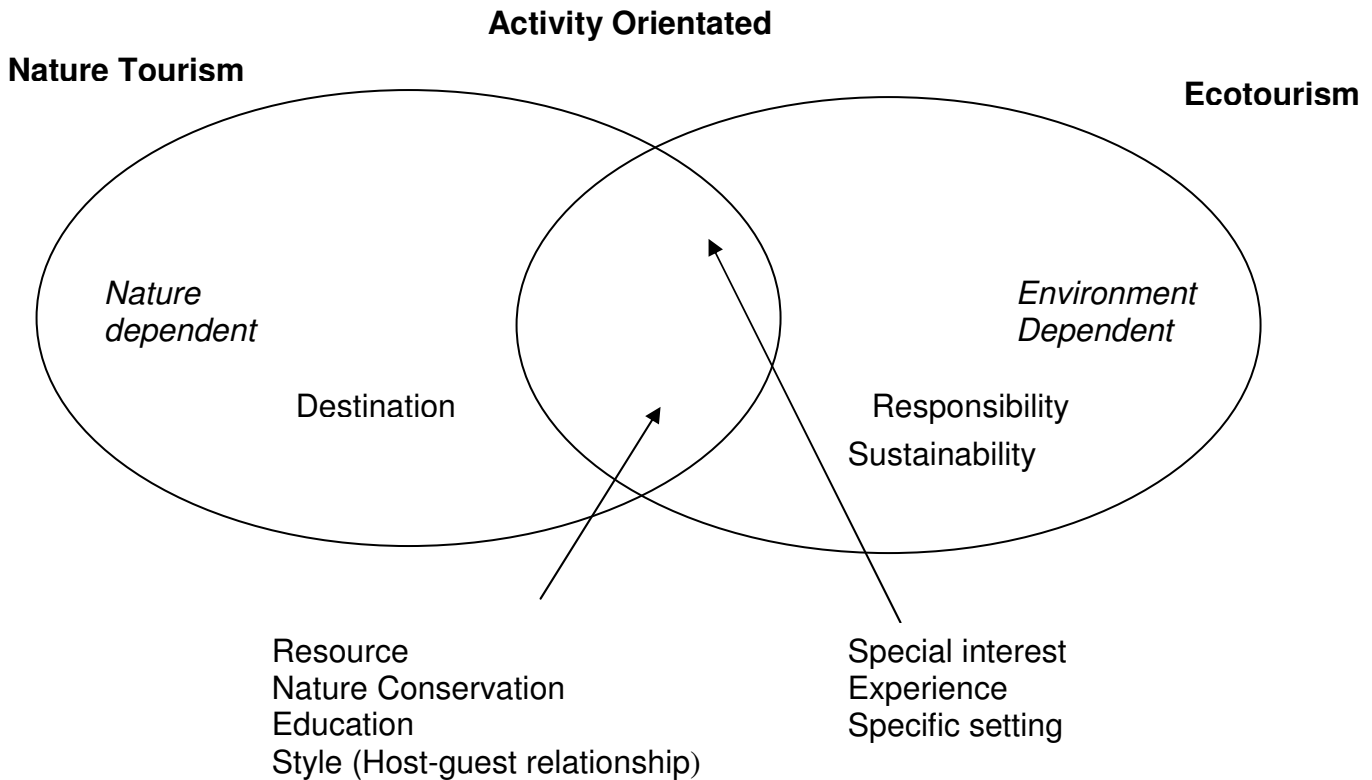


Figure 3.1: Conceptual relationship between nature tourism, ecotourism and adventure tourism

Source: Sung (2000)

Poon (2003) suggests that one of the key characteristics of the “new tourists” is their need to escape from their everyday routine in a bid to achieve some fulfilment. The growth of adventure tourism is also being fuelled by the media through a variety of magazines, reality TV programmes and specialized multimedia channels such as National Geographic. In addition, Buckley (2003) suggests that from a financial perspective, adventure tourism is also tightly tied to the clothing, fashion and entertainment industry.

It is expected that technological innovation will also result in an increase in adventure recreation participation. Technological innovations, such as lightweight equipment, have increased access to many adventure recreation sites. They have enhanced the ability of participants to deal with dangerous events or environments. Technology plays an

important role in providing information about important opportunities, safety, costs and other valuable knowledge components (Ewert & Hollenhorst, 1997).

Whilst the boundaries of adventure tourism are not that well defined, its core activities are. The types of activities that are commonly provided by commercial operators are provided below.

Table 3.4: Most commonly provided outdoor adventure travel activities

Arctic trips	Horseback riding	Sailing
Backpacking	Hunting	Skiing
Ballooning	Jungle exploring	Skydiving
Bicycling	Kayaking	Snorkelling
Bird watching	Motorcycling	Snowmobiling
Bungee jumping	Mountain biking	Snowshoeing
Camping	Mountain climbing	Soaring
Canoeing	Nature trips	Spelunking
Diving (scuba, sky)	Orienteering	Survival and wilderness trekking
Dog sledging	Paragliding	Walking tours
Fishing	Rafting	Windsurfing
Four-wheel drive trips	Rappelling	
Hangliding	Rogaining	
Hiking	Safaris	

Source: Sung (2000)

From the above list it is evident that the risk and danger associated with the various activities ranges from very high to very low. According to Lipscombe (1995:42, the “continuum involves different degrees of challenge, uncertainty, setting, familiarity, personal abilities, intensity and durations and perceptions of control”.

Soft adventure would involve very low levels of risk and may be undertaken by anybody physically fit and able, yet they would not necessarily have to have any previous experience in their chosen holiday. Accommodation would be provided and there would be little or no need for participation in anything other than the chosen holiday. Motivation for this would be more the experience rather than the expectation of an encounter with any risk. On the other hand, hard adventure would require previous experience, ability to cope with the unexpected and skills associated with that type of holiday.

Research (Kalahari Management Inc and New World Expectations, 2001) shows that consumers believe that adventure alone is not the only driver of satisfaction – it should be combined with scenic thrills and relaxation, plus a high-quality product and service. The ideal adventure trip, as found in Sung’s research (2000), should involve various activities, but not too many that they do not have enough time to relax. Consumers want an element of perceived risk but still want fun and excitement rather than just being in a risky and thrilling situation. An ideal trip should be experiential in that some form of personal growth is experienced

Table 3.5: Important factors for an ideal adventure trip

Description	Frequency	Percentage
Numerous activities with relaxing times	227	22.0
Challenging	187	18.1
Fun, exciting	128	12,4
Experiential, out of the ordinary	114	11
Rewarding, educational	97	9.4

Source: Sung (2000)

Useful guidelines have been identified as to what travellers expect of their adventure travel service provider.

Table 3.6: What travellers expect from adventure travel companies

Description	Frequency	Percentage
Professional expertise	388	37.6
Reasonable price, good value	267	25.8
Well organized	162	15.7
Customized service	128	12.4
Dependability, reliability	110	10.6
Reputation	110	10.6
Flexibility	106	10.3

(N – 1 033, with 2 144 multiple responses)

Source: Sung (2000)

In studying commercial white water rafting, Arnould and Price (1993) identified three organizing themes associated with satisfying adventure experiences. Firstly, the opportunity for communication or connection with nature, secondly, an opportunity to build community and connect with others outside of one's normal circles and thirdly, an opportunity for extension and renewal of oneself. Research done by Tourism Queensland (2004) shows that adventure travellers respond to a wide array of travel motivators including adventure, excitement, outdoor recreation, physical activity, personal challenge and environmental conservation.

Adventure travellers are well travelled and can be demanding. They have often experienced adventure trips to other destinations and are attuned to good quality. They are willing to pay, but only if the value and quality of experience is there. Whilst the overriding motivation for adventure travel is still fun and entertainment, it varies by age. 25-54 year olds are more likely than other adventure travellers to take a trip to get away from it all, 18-24 year olds take a trip for the thrill whilst 55-64 year olds take a trip because of an interest in the environment (Sung et al., 2000).

Adventure tourism needs environments that provide a physical challenge. The individual traveller wants specific places that provide a route to accomplishment. Often the environment is seen as a challenge and there is a need to conquer it, not necessarily to

appreciate it. Environmental protection, pristine qualities and preservation of diversity are not the primary motivators for the adventure traveller. Hazardous environments, remote challenge and access for use are important.

Adventure tourism is facing opposition from the environmental lobby. Widespread garbage, damage to sensitive environments and intergroup conflict are cited as major problems. Environmental degradation caused by adventure tourism is common. Adventure tourists have a positive environmental impact when they start to value the environment they have visited. If adventure tourism is to increase, it must prevent environmental destruction. Acceptable levels must be determined and adhered to, or social and ecological impacts will continue to rise.

3.6 Adventure Tourism Industry

According to Swarbrooke et al. (2003), the adventure tourism industry is complex and multifaceted. Adventure tourism is dependent on not only one element of mainstream tourism, but on a variety of specialist suppliers. The majority of the adventure travel industry is dominated by small entrepreneurial organizations that contribute to its complexity and coordination.

The wide variety of suppliers that meet the demand for adventure tourism include:

- Tour operators: Generally the operators are small-scale companies that specialize in particular types of activities or regions of the world.
- Adventure ground handling companies: Generally these are entrepreneurial companies that focus on a specialist adventure type. They arrange tours on behalf of tour operators or for independent travellers.
- Travel agents: Most adventure products are sold directly to clients or through operators, but there are a number of travel agents that specialize in adventure travel.
- Equipment suppliers: As most adventure tourism requires some form of specialist equipment, it creates a need for equipment manufacturers, retailers and rental companies.

- Accommodation: Depending on the sport, a variety of accommodation is used from the most basic, such as tents and huts, to luxurious accommodation.
- Transport: This is often needed to and within the destination. Because of the remoteness of some of the destinations, the journey often forms part of the adventure.
- Media: The adventure tourism media consists of four major elements, i.e. guidebook, travel writing, specialist magazines and television adventure programmes.
- Voluntary organizations: Although most adventure tourism companies are profit-driven ventures, there are a number of volunteers who play significant roles, e.g. professional bodies, activity centres.
- Destinations: Sometimes the destination is core to the activity, whilst in other instances it is incidental background to the activities.

3.7 South African NTO

Governments are normally the driving forces of tourism development in the sense that they are the major stakeholders in the planning, development and management businesses. It is through a government that a framework within which tourism has to be planned and developed is drawn up and implemented. The government thus becomes involved in the tourist organization internationally, nationally and regionally (Cooper & Schindler, 2003).

In South Africa the national bodies consist of both the public and private sector. Government and public sector bodies become involved in tourism because of the impact tourism has on society at large. The public sector often acts as a guardian of potentially endangered national and local environments, cultures and communities (Lubbe, 2005).

The national public sector bodies consist of the Department of Environmental Affairs and Tourism (DEAT) and SAT. DEAT aims to develop the tourism sector as a national priority in a sustainable and acceptable manner so that it will contribute significantly to the quality of life of every South African. It is responsible for creating conditions for sustainable growth and development, promoting the sustainable development and

conservation of natural resources and protecting and improving the quality and safety of the environment.

SAT is a national agency responsible for the international marketing of South Africa as a preferred destination. It promotes South Africa generically in terms of its unique selling point as an all-season destination and has adopted the theme of the African Renaissance to help drive its marketing objectives. Its marketing strategy thus aims to promote South Africa's scenic beauty, diverse wildlife, ecotourism and diversity of cultures and heritage, while also striving to realize the country's potential in terms of sport, adventure and conference and incentive tourism.

3.8 Role of NTOs

National destinations are some of the most difficult entities to manage and market owing to the complexity of the relationships between stakeholders (Buhalis, 2000).

Jeffries (2001) suggests that the key roles of NTOs are to bring tourist products to the attention of intermediaries, e.g. travel agents and would-be tourists, and to facilitate their booking and purchases. Briggs (2000) suggests that although responsibilities of national tourist boards differ, they generally include coordination of promotional activities, strategic guidance and advice to tourism organizations, monitoring of quality and standards, liaison with various authorities to ensure that tourism is represented in policy decisions and improvement of consumer access to information and ease of purchase by helping to establish effective booking and information channels.

Traditionally the key role of a destination marketing organization has been perceived to be the narrow promotional role of creating and communicating appealing images to various target markets. Because of various factors, including intensification of competition and increasing sophistication of tourists in destination choice behaviour, the roles of these organizations are changing in many ways. Lubbe (2003) suggests that roles that could be played by destination marketing organizations are to generically market their respective destinations and facilitate the marketing efforts of other public

and private sector stakeholders. These include image and brand creation, marketing research, consumer promotion, travel trade marketing, package and tour development, information distribution and fulfilment and facilitating partnerships.

Swarbrooke et al. (2003) note that in almost all varieties of adventure tourism the destination is the core of the experience, giving a unique flavour to the experience. These destinations provide the key attraction that motivates the tourist to take a trip in the first place. Destination marketing in most countries is organized in a hierarchical fashion. A destination comprises a combination of products, services and experiences provided in a particular area. A destination is not always a single place, but can be a conceptual identity, which incorporates several destinations and locations. National governments promote whole countries usually through a few key images of what are perceived to be leading attractions of the countries. Regional authorities often promote regions within countries, again highlighting their own selection of leading attractions. The individual municipalities or local government authorities seek to market their own corner of the region. There is often tension between the different geographical levels of marketing, and mixed, confusing messages are often given to the market as a result (Swarbrooke et al., 2003:167).

According to Dore and Crouch (2003:138), NTOs focus mainly on marketing as their principal management function. They may play some role in product development and operations, but this is still rare and normally left to the private sector to arrange, with government providing a tourism policy and regulatory framework. More specifically, recognizing that marketing entails much more than “selling” or “advertising”, destination marketing is normally the major activity and budget item.

These key responsibilities as suggested in the literature will be examined in more detail.

3.8.1 Marketing Research and Knowledge Management

NTOs should conduct relevant market research and build databases on key information that is required to make informed and strategic marketing decisions. Research initiatives that could be facilitated by them include:

- Trends in destination tourist arrivals
- Characteristics of tourism and key market segments
- Information sources and media behaviour
- Perception and satisfaction levels of tourists
- Tourist activities and behaviour within the destination

In a competitive marketplace with greater emphasis on identifiable, quantifiable results, destinations must be both more efficient and effective in their marketing activities. To achieve this goal, destinations must adopt more sophisticated techniques for ensuring that marketing has the desired impact. The use of market research to meet the specific needs of destination marketing will ensure achievement of this goal with efficiency and effectiveness (Day, Skidmore & Koller, 2002).

Swarbrooke et al. (2003) recommend research on a number of topics that are specifically related to adventure tourism. These include establishing the impact of adventure tourism on both the tourist and the destination, gaining increased knowledge on the perceptions, attitudes and motivators of adventure tourists and how they make their purchase decisions and finding out more about cross-cultural differences in perceptions of adventure.

3.8.2 Destination Branding

Countries often showcase their history, culture and attractive scenery in their marketing, but in reality many destinations have these attributes. It is important to build a brand on something that is highly differentiated and unique; something that uniquely connects a destination to the consumer. It must also be a proposition that the competition wants and may be able to copy, but they cannot surpass or usurp. Whatever proposition is used, it must also have the potential to evolve in a long-term branding campaign, so it is essential to get it right. However, the point of differentiation must also reflect a promise that can be delivered and that matches expectations. Good destination branding is therefore original and different, but its originality and difference need to be sustainable, believable and relevant. Place branding is an extremely complex and highly political

activity that can enhance a nation's economy, national self-image and identity (Morgan, Pritchard & Pride, 2004).

Adventure tourism (Swarbrooke et al., 2003) is becoming increasingly competitive with direct competition coming from a variety of places including neighbouring regions that offer similar attractions, regions elsewhere in the world that offer similar attractions, regions elsewhere that offer different attractions but similar benefits, and adventure sports and activities that consumers can undertake in their home area. As a result the need for destinations to create a unique identity – to successfully differentiate themselves from competitors – is more critical than ever.

The success of many destination marketing initiatives is dependent upon the effective engagement of a significant portion of tourism businesses. The vast majority of these businesses belong to entrepreneurs, predominantly employ members of the host society and are rural based (Morrison & King, 2002). The positive characteristics accentuate the crucial contribution of small tourism businesses to any destination, while the negative clarify some of the challenges facing policy-makers and support agencies. Attracted to a sector with few barriers to entry, many owner-operators establish their operations for 'lifestyle' reasons, content to pace their lives to patterns of seasonality of demand, operating at a base economic level that is sufficient to deliver on social aspirations. They tend to be peripheral to what policy-makers and economists consider to be the 'tourism industry'. In reality, many struggle to sustain their chosen lifestyle and suffer from financial and human resource poverty. These characteristics result in a highly heterogeneous, fragmented sector of economic logic-defying businesses. Furthermore, most owner-operators have limited experience, motivation or capability in the application of new technology such as using the Internet to access international markets (Applebee et al., 2000).

It is suggested that NTOs take command of branding and product development. Otherwise, in a changing and confused stakeholder market, the large operators will simply take to the market what they believe is the most appealing product. This will be at the expense of the smaller players and will simply dilute the industry (Swarbrooke et al., 2003).

3.8.3 Advertising and Promotion

A promotional strategy needs to communicate a brand positioning to both tourist and travel intermediaries. A push strategy is needed to create awareness and interest amongst past, current and potential visitors. In addition a pull strategy is needed for intermediaries to inform and educate them about the destination and to familiarize them with its tourism attractions and other resources.

Mills and Morrison (1998) suggest the following promotional activities and communication channels for both consumers as well as intermediaries:

- Consumers: Push strategy
 - Past visitors – direct mail, newsletters, telemarketing, World Wide Web
 - Current visitors – travel information centres, travel maps and literature, hospitality and service training programmes
 - Potential visitors - media advertising, telemarketing, travel videos and films, World Wide Web, consumer travel shows, direct mail/fax advertising, enquiry handling and fulfilment, publicity

- Travel trade/media/local community: Push strategy
 - Travel trade intermediaries – trade journal advertising, travel trade exhibitions, workshops and seminars, World Wide Web, press releases, preferred supplier programmes, newsletters, enquiry handling and fulfilment, familiarization trips, display materials, direct mail/fax advertising, collateral material (visitor guides, calendars, maps etc.)
 - The media – editorials/feature stories, familiarization trips for writers, newsletters, press conferences and releases, World Wide Web
 - Local communities – tourism awareness, hospitality/service quality award programmes, World Wide Web

NTOs need to work with bodies on a collaborative and integrative basis outside traditional advertising. This is particularly true of niche destinations with a small share of

voice. Such destinations must be alive to alternatives and focus on branding opportunities offered by sport, cultural and political activities.

NTOs must look to the future to consider the opportunities offered through interactive media, digital television (video on demand, interactive booking) and the Web (itinerary planning and “look and book”). These media cannot be ignored, as not only do they interactively engage pre-visitor trips, but they also provide direct marketing opportunities (Morgan, Pritchard & Piggott, 2003). The Internet is playing an increasingly important role in the tourism industry. It will continue to grow as more people have access to the Web and it can also now be accessed from different types of equipment such as television, handheld personal digital devices and mobile telephones. The Internet is relatively low-cost compared with other advertising media, especially when considering that the information can be accessed 24 hours a day from anywhere in the world. However, maintaining a dynamic and interesting website is a highly skilled activity. It involves the creative mapping of a tourism strategy to a design space for which there are guidelines. Research has shown that government-sponsored tourism websites have a long way to go before a visit to them can be classed as a memorable experience (Standing et al., 2000).

King (2001) believes that destination marketing organizations have long been structured and their strategies influenced by traditional process and passive customers. With new technology and trends, the customer is now more actively involved in the process, rendering previous processes redundant. It is recommended that destination marketing organizations get away from promoting the destination to a mass market and relying on an outdated distribution system, and instead engage with the consumer to ensure that they effectively promote and provide the experience they are wanting. Travel is increasingly more about experiences, fulfilment and rejuvenation than “places and things”. It has been found that brochures and websites still focus on the “hardware” of airline seats, hotel or resort beds and places to be visited, with little if anything about the experience or benefit. Increasingly, the Internet is becoming more important to travellers in seeking out destinations of interest in researching and planning their trips and in making bookings and trip purchases.

Lubbe (2005) suggests some broad criteria for developing and evaluating destination promotion strategies. All promotional activities should be coordinated. The activities should be centred on specific themes to increase recognition. Promotional activities should be authentic and consistent to avoid deception. Whilst the destination is important, it needs to be complemented by sound product, price and distribution decisions.

3.8.4 Booking Facilitation.

Palmer et al. (2000) suggest that tourist destinations can benefit from the Internet by developing a consistent position in the marketplace, increasing their market share by getting closer to customers (current and future), and subsequently by ensuring delivery of high level customer satisfaction. The role of information integration and brokerage is especially applicable to destination marketing organizations such as the state tourism department and national tourism offices, as they rarely have a product of their own to sell. Instead, their role is to match buyers with sellers, demand with supply and producers with consumers by positioning and promoting a place as a destination brand.

Despite the Internet offering many exciting opportunities, the basic principle of trust that underlies cooperative efforts cannot be ignored. NTOs typically involve numerous competitors - there is a delicate balance between the individual's business and the collective needs of the group. Where there is a perception that one business is favoured over the other, mistrust develops. Coordination of cooperative activities can thus prove challenging and necessitate a style of leadership that that accommodates and reconciles the interests of multiple stakeholders.

Increasing the number of packaged vacations and tour programmes to a destination can increase traffic flow. It is imperative that NTOs recognize the implications of their actions in the overall interest of the long-term economic sustainability of the tourism sector.

3.8.5 Facilitating Strategic Partnerships

NTOs are increasingly facilitating partnerships between themselves and other tourism and non-tourism organizations. Effective strategic partnerships are required to coordinate and leverage marketing. Resources can also be shared to achieve maximum benefit and effectiveness. In addition, strategic partnerships are needed with other non-tourism industry associations and sectors, which can be pursued to access new marketing channels. Another challenge is the need to develop human resources, particularly previously disadvantaged communities, both for reasons of delivering quality services for tourists, as well as enhancing general skills of the local workforce.

To accommodate these dramatic changes and to benefit from the new opportunities, the structure and skill base of NTOs will need to undergo significant change. Organizations that have supported traditional functions of destination advertising, publicity and promotion, information servicing, distribution channel development and servicing, which in turn provided one-directional mass communication, will need to reconstruct from the ground up. The new direction will require changed structures and additional skills related to brand and subbrand development, customer networking and relationship and management strategies. It will also require working as a conduit between customers and suppliers to convert tourism products into relevant tourism experiences. NTOs have a clear role in facilitating the connection between the customer and the experience they are seeking. They have a more direct role in developing and managing comprehensive inventories of products and experiences. They certainly have a greater role in customer servicing and contact and, rather than leaving the conversion process to take care of itself, they will possibly enter into strategic relationships with industry partners which can provide a seamless process between the connection with and final conversion of the customer (King, 2001).

CHAPTER 4: BEST PRACTICE ANALYSIS

4.1 Introduction

Despite the growth of adventure tourism, the research undertaken in the field of adventure travel is limited. There is no empirical research pertaining to the role of NTOs in establishing a competitive adventure travel industry.

In an effort to develop a conceptual framework of what needs to be done by SAT to establish a competitive adventure travel industry, a secondary data study was undertaken to establish the activities and best practices undertaken by competitive national tourism offices. The competitive organizations studied are the Canadian Tourism Commission, Tourism Australia and Tourism New Zealand. These organizations were selected on the basis of the high level of transparency as well as the fact that information was readily available in English. The activities of SAT were also studied to enable a comparative analysis.

A critical examination of their respective websites and government policies was undertaken to identify best practices and activities that pertain to the adventure travel industry. Activities that were singled out in the study were roles and responsibilities that should be conducted by an NTO as recommended in the literature study. These include market research, destination branding, advertising and promotional activities, booking facilitation and facilitation of strategic partnerships. Whilst the best practices described on the websites may be not exhaustive, they demonstrate the commitment of the various organizations to specifically grow the adventure travel industry.

In conclusion, a comparative study was done to compare the levels of support for adventure travel relative to those provided by SAT.

4.2 Canada

The NTO for Canada is the Canadian Tourism Commission (CTC).

4.2.1 Background

The mission of the CTC is to increase awareness of and interest in Canada as a premier four-season tourism destination. With its public and private sector partners, the CTC undertakes macroeconomic, market and industry research, product and industry development and advertising and promotional activities in markets across the world.

4.2.2 Market Research

The CTC provides an abundance of detailed research reports and information to help adventure tourism service providers make profitable business decisions. Examples of publications include titles such as “Risk Management and Insurance Guidelines for Adventure Tourism, Ecotourism and Alpine Skiing Sectors” (Appendix 1) and “International Adventure Travel and Outdoor Sports Show - Enthusiast Survey” (Appendix 2).

In order to obtain a better understanding of the potential size, characteristics and interests of Canadian activity-based market segments, special analyses and reports based on the Travel Activities and Motivation Survey (TAMS) have been commissioned. The research provides a rich source of information for tourism businesses and marketers who want to increase or retain the adventure enthusiast market in Canada in the future. Examples of publications include “A Snapshot of Hiking and Backpacking in the North American Market”, “A Snapshot of Canoeing and Kayaking in the North America Market” (Appendix 3) and “The Hard Outdoor Adventure Enthusiast” (Appendix 4). In addition to a current profile of outdoor adventure enthusiasts, TAMS is modified to permit an assessment of the impacts of an aging population on market potential for this group. Using population projections for Canada obtained from Statistics Canada, TAMS data were “aged” twenty-five years into the future. Comparisons of the market size, composition and travel behaviour of Canadians in 2000 with estimates of the market profile in 2026 provide tourism planners and marketers with critical information about the products and services that may be required in the future to attract tourists.

Research activities are extremely transparent and also shared with all stakeholders. A balanced scorecard has been developed with performance measures for research (see Appendix 5). The balanced scorecard is intended to help effectively communicate the strategy of a multifaceted and decentralized organization such as the CTC. The strength of a balanced scorecard is that it makes specific links between the different dimensions of business performance by providing a single integrated framework for use at all levels of management.

The CTC continuously tracks and evaluates the success of its marketing campaigns through evaluation and conversion studies. These evaluative research efforts have allowed the CTC to track the performance of its campaigns to ensure an acceptable return on investment (see Appendix 6).

4.2.3 Destination Branding

Positioning statement: *Canada. Keep Exploring.*

Adventure tourism is strongly supported and encouraged by the country positioning. The brand positioning attempts to capitalize on the inherent impulse to explore, and Canada as a place worth exploring. Brand Canada has been designed to bridge the gap between consumers' historical perceptions of Canada as simply a place of beautiful geography and attempts to provide a new frame of reference, to take everything that is good and true about Canada and make it more relevant and personal. Ultimately, Brand Canada is not a statement about what Canada is. Brand Canada is an idea and a promise to the consumer of what a vacation experience in Canada can be.

The CTC has reduced its core markets to 11 from 19 and focuses only on markets that yield the highest return on investment. Under a reduced market portfolio, the CTC believes it is better positioned to understand the needs and wants of travellers in its core markets. The CTC strongly believes there is a changing trend from destination travel to the emergence of experience-based travel and thus manages its business accordingly.

4.2.4 Advertising and Promotional Activities

An integrated above-the-line marketing campaign has been developed – it includes media options such as print, radio, outdoor advertising on the subways, branded coffee sleeves, branded bags in bakeries, public bus wraps and 3D posters. The creative execution strongly supports adventure travel (Appendices 7, 8 and 9).

GoMedia Canada is a state-of-the-art media site designed to improve the quality and availability of information for media outlets. It empowers journalists to create their own profile, allowing them to save content and story ideas for future reference, contribute their published stories and to even send their entire profiles to interested parties (Appendix 10). Other features include advanced search functionality, story ideas, pre-written stories, imagery, news releases, rates and important dates, a video library, registration and information for special programs, and an online feedback mechanism. Self-service functionality has been engineered into the site, eliminating the previous offline process of requesting and registering for media tours and travel assistance programs. This frees up valuable CTC staff time previously allocated to these activities. The GoMedia Canada programme has been widely successful in targeting all media to obtain unpaid media coverage. GoMedia includes a comprehensive section on outdoor and adventure travel. Examples of major coverage received include 9 pages in the special interest magazine “aktiv Sportmagazin” on heli-skiing in Canada, 1,5 pages in the special interest magazine “Deutsches Ärzteblatt” on whale watching and the Riding Mountain National Park generated from a WDCS press trip to Manitoba, 5 pages in the special interest magazine “Tours” on a canoe trip – generated from an individual press trip to Manitoba.

The CTC participates in various “Adventures in Travel” expos around the world including the USA, China, France and Germany. Unicomm, LLC, the show’s producer, has taken the approach of adding a luxury pavilion to each of the shows. The strategy of marketing adventure and luxury has brought a more mainstream consumer to the shows. Both products provide high-end clients with a strong return on investment.

On a daily basis tourism news is delivered electronically to tour operators. New programmes and marketing opportunities are shared to help them run their business

more effectively. An electronic monthly travel magazine is also available, which contains various adventure travel articles (Appendix 11).

4.2.5 Booking Facilitation

An innovative interactive tool “Explorer Quotient” (EQ) has been developed by the CTC. This online self-examination allows each potential traveller an opportunity to discover his or her individual explorer 'type'. It allows website visitors to input their preferences, expectations and personality type, while the software generates a designation of what type of explorer they are. Once the consumer's type is determined, a host of experiences is presented to encourage travel to Canada. The EQ model is unique to the industry in that it recognizes and operates on social values, not demographics.

4.2.6 Facilitating Strategic Partnerships

Canada provides an excellent best practice for managing strategic partnerships. The CTC believes that the optimum way for small businesses to grow is for them to experience firsthand the practices of similar businesses and to then transfer what they learn to their own business. It facilitates regular study tours where best practices are exchanged. Best practices and lessons learned include partnerships, Internet marketing, customer services, product development, staffing and training and environmental stewardship. The information is widely available for all operators to use.

Through its Tourism Innovation Partnership Program (Product Clubs), the Product Innovation and Enhancement Unit encourages small business to develop new products by building partnerships. The objectives are to increase the range and quality of tourism products in Canada, build business networks to increase the exchange of information and to encourage cooperative ventures and partnerships. Product Clubs help small and medium-sized businesses overcome impediments to tourism growth in a given geographic area or industry sector. They enable groups to present a united front in addressing issues of concern and to come together in partnering alliances to achieve common goals. If various sectors of the industry can create a critical mass through a Product Club, then they may be able to participate more effectively in CTC marketing

programmes. They can also be better equipped to grapple with a host of barriers to tourism development. Product Clubs may offer strategies for improving the marketability of a product; they may offer practical methods for improving the competitiveness of a sector; they normally involve businesses getting together to develop a new tourism product. The Industry and Product Development Chair has set up a subcommittee composed of representatives of the private and public sectors, with the mandate to facilitate the implementation of the strategies in the report on the adventure travel/ecotourism workshops.

The CTC has developed a database to assist adventure and ecotourism operators. The database provides operators with an accessible and central insurance services resource. Participation in this database by the insurance service providers is strictly voluntary and free of charge. While many organizations have chosen to participate, some have declined or have provided limited information.

CTC and Air Canada have partnered to jointly market Canada as an explore destination. An increasingly popular form of partnership for the CTC is that of non-traditional partnerships. Non-traditional partnerships are business partnerships outside the tourism industry which have not invested in tourism promotion. These partnerships can provide access to significant financial participation in CTC marketing activities, particularly for international markets in which other Canadian industries want to develop and seize business opportunities.

The CTC has set an objective to maintain and achieve a 1:1 ratio of partner contributions with government funding. Examples include a long-term partnership with Toyota Canada with a total investment of \$12 million over three years. Kodak Canada Inc. entered into a partnership agreement with the CTC to raise awareness and drive consumers to the CTC's travel planning website.

4.3 Australia

The NTO for Australia is Tourism Australia (TA).

4.3.1 Background

Tourism Australia is responsible for international and domestic tourism marketing as well as the delivery of research and forecasts for the sector.

4.3.2 Market Research

A separate organization, Tourism Research Australia, has been established to focus on producing and disseminating timely, relevant and accurate research and insights to industry and promoting the important role research plays in underpinning informed decision-making.

Although most statistics focus on regional segmentation, attempts are being made to segment the market by type of traveller, e.g. backpackers, and to gain insight into key behaviour and characteristics (Appendix 12). This could assist adventure operators in developing appropriate business strategies.

TA publishes a monthly online newsletter that reports on the Australian inbound tourism industry, including global tourism trends and developments, latest research and other key statistics, marketing opportunities and what is new in Australian tourism. It also provides a consultancy service that offers survey and questionnaire design and research into niche markets, regional tourism and other significant issues.

Considerable resources are invested to evaluate the effectiveness of marketing efforts. The principal tool used is annual brand tracking surveys. The surveys track the impact of marketing activity in all key international markets, among the target segment of “Experience Seekers” and the broader population. The primary measure of the campaign’s effectiveness is whether it has increased intention to travel (as determined through the brand health tracking survey in key markets). TA has constructed the following evaluation framework for the campaign:

- Consumer disposition
 - o Increased levels of intention to travel within a one- and two-year timescale
- Consumer knowledge
 - o Increased level of knowledge of Australian experiences by potential visitors

- Consumer response
 - o Tactical response to campaigns and taking action to next step – measurable next engagement
 - o Consumer exposure to campaign
 - o Engagement with the campaign
- Stakeholder engagement
 - o Alignment of industry marketing activity, supplementary to TA placements
 - o Stakeholder support

4.3.3 Destination Branding

Positioning statement: *Where the Bloody Hell are You?*

The country positioning clearly supports adventure tourism. The brand proposition is “Australia invites you to get involved”. It captures the essence of Australia’s famous warmth and hospitality and provides a personal invitation to share in the uniquely open Australian experience, defined by the Australian people, lifestyle and environment. Australia actively targets “Experience Seekers” who are actively looking for self-fulfilment and personal growth through new and different experiences.

Based on extensive research a comprehensive demographic and psychographic profile has been developed for Australia’s “ideal” visitor (Appendix 13). Experience Seekers have common characteristics across all markets, irrespective of nationality or origin of birth. Ultimately, they have the drive for self-development and learning, they relish relationships – the desire to connect with friends and family through socialising, relaxing and enjoying, they search for health and rejuvenation and have a sense of freedom and escape. To the Experience Seeker, new experiences are everything.

4.3.4 Advertising and Promotional Activities

An integrated above-the-line marketing campaign has been developed that includes media options such as TV, print, outdoor, digital and point-of sale. The creative executions strongly support adventure travel (Appendix 14).

TA has entered into a strategic three-year partnership with the National Geographic and Discovery Networks as the two primary international conduits to deliver Australian destination messages globally (Appendix 15). This initiative aims to consolidate a segment of media investment into single global packages with some of the world's most respected media brands. The consolidation is designed to provide TA with various communication tools and channels in order to influence potential visitors to move from increased preference to actual intention and visitation. Global Programmes enable TA to negotiate and leverage worldwide editorial, publicity, sponsorship and advertising deals with both media brands. The editorial and publicity deals are designed to add additional value to TA's advertising spend. Unlike the advertising spend, which is locked into a 12-month advertising calendar, the editorial and publicity deals are more fluid, allowing for new ideas and initiatives to evolve over time. The strategic partnership with these organizations will ultimately provide access to over 150 million people globally and deliver around \$22 million in value.

As part of a year-long campaign, a fully branded bus travels around North-eastern USA and Eastern Canada visiting and educating travel agents and media on quality Australian product and experiences.

TA coordinates and participates in a number of international trade shows and events each year to promote Australia as a premier travel destination. The majority of these trade shows and events are held within key international markets, bringing together the Australian tourism industry to meet with travel agents and wholesalers from around the world.

TA's Marketing Mix Builder (Appendix 16) is an interactive website that provides the Australian tourism industry with information on a range of international and domestic marketing opportunities targeting consumers, wholesalers and travel agents. The Marketing Mix Builder allows tour operators to develop a marketing plan using TA's range of trade and consumer cooperative marketing opportunities.

4.3.5 Booking Facilitation

TA's official website, australia.com, has a specific adventure category to facilitate adventure travel bookings (Appendix 17). The adventure category is subdivided into 4 specialist areas defined as Motor Mania (80 listings), Air and Earthbound Escapes (9 listings), Marine Paradise (344 listings) and Alpine Adventure (142 listings).

Suppliers can be found by category, alphabetically as well as by region. Information includes tour descriptions, proximity, indicative rates and accreditation (Appendix 18).

4.3.6 Facilitating Strategic Partnerships

TA has entered into a partnership with UNESCO. The partnership outlines a vision to create an environment of shared learning and assistance for world heritage areas between developed and developing countries. Australian certified operators are donating their tourism services for incorporation into a series of Australian travel itineraries known as World Heritage Eco-Escapes. These travel programmes are marketed and sold internationally at full market value by a private travel agency. The funds generated from the Eco-Escape programme are donated to the World Heritage Fund for supporting projects and activities aiding Australian world heritage site conservation and protection, the development of sustainable tourism and the presentation of heritage to the public and visitors.

American Express and TA have formed a partnership to promote Australian experiences that include golf trips, family adventures, epicurean explorations and ultra-luxurious experiences. The idea behind this initiative is: "Why wait? There's no time like the present to take advantage of great offers and book that once-in-a-lifetime experience." A card member can receive double membership rewards points, a statement credit on qualifying vacations and an Australian vacations values card which offers a range of exclusive values on shopping, dining and sightseeing across Australia, including two-for-one savings on some of Australia's best and most unique experiences.

4.4 New Zealand

The NTO for New Zealand is Tourism New Zealand (TNZ).

4.4.1 Background

TNZ's principal objective is to ensure that New Zealand is marketed internationally as a visitor destination in order to maximize the long-term benefits for New Zealand.

4.4.2 Market Research

TNZ has developed a tourism research and development strategy. Various research projects have been established that will assist with long-term planning to determine capacity requirements considering the increase in tourism demand. International visitor survey data is recorded using particular classifications and terms. Classifications include main reasons for travelling as well as visitor characteristics/demographics classifications.

TNZ is continuously conducting in-depth research into the preferences of its target market to enable the development of competitive travel products. It has been established that activities that offer beautiful scenery, a friendly guide, interaction, education, uniqueness and a genuine emotional connection are more appealing. Research has also uncovered the need for safety in adventure travel. For visitors to choose a thrill-seeking/adventure activity, they need to be sure that they will get through it in one piece. Safety is interpreted as having modern and well-maintained equipment, up-to-date facilities, safety accreditations on display and a thorough safety briefing – visitors appreciate being able to mentally prepare for an adventure activity.

TNZ also commissioned independent research to track satisfaction levels of international visitors. It found that certain activities are strong contributors to overall holiday satisfaction and deliver an enjoyable holiday experience to the interactive traveller in New Zealand. These include scenic drives, bush walks, glacier walks, general sightseeing and beaches. TNZ also concluded that scenic flights, gliding and ballooning, tramping, kayaking and rafting offered further potential to the industry due to the high levels of interest.

4.4.3 Destination Branding

Positioning statement: *100% Pure New Zealand.*

The country positioning strongly supports adventure tourism. Its brand essence is “landscape” and its positioning is “New Pacific Freedom”. The values behind New Pacific Freedom are contemporary, sophisticated, innovative and creative, spirited and free – emotive expressions that are combined against a backdrop of New Zealand’s landscape. In an increasingly competitive environment, TNZ concentrates on a consistent message and a way of differentiating itself from every other destination.

The principal payoff line is “100% Pure New Zealand” and has a number of derivatives such as “100% Pure Spirit”, “100% Pure Adventure”.

The “Interactive Traveller” has been identified as New Zealand’s target market

It is estimated that the Interactive Traveller represents between 5% and 10% of the total population of its four core markets.

4.4.4 Advertising and Promotional Activities

The 100% Pure New Zealand campaign combines advertising, Internet, international media coverage, events and trade training to market destination New Zealand to the key target markets. An above-the-line campaign that encourages adventure experiences is flighted on Discovery, National Geographic and other lifestyle magazines. The print campaign has executions for the sole purpose of adventure travel.

The Internet is a key component of the 100% Pure New Zealand campaign and was launched with the new campaign. New Zealand Tourism Online quotes actual visitors to the website at between 12 000 and 15 000 per week with the average time spent per visitor being about 15 minutes.

TNZ’s bimonthly online publication, Regional Rap, contains anecdotal feedback and forecasts from the main inbound markets. It discusses local and international tourism issues and successes.

4.4.5 Booking Facilitation

TNZ's official website, newzealand.com, has a specific Sights and Activities category to facilitate adventure travel bookings (Appendix 19). The adventure category is subdivided into three specialist areas defined as Land Activity (461 adventure listings), Water Activity (530 listings) and Air Activity (81 listings).

An additional search facility has been added for quick access to regions and activities. (Appendices 20 and 21).

An innovative e-tool, Travelplanner, has been developed to assist consumers plan their holiday. Travelplanner is themed around adventure activities by region and helps the tourist collect information, get around and plan and book the trip. Each listed adventure activity has an option where it can be added to Travelplanner.

The Qualmark quality assurance system has a star grading system for accommodation and an endorsement system for other tourism businesses such as adventure activities, attractions, cultural and nature experiences, coaches, rental cars and more. Each listing on the website indicates whether it has been endorsed or not.

4.4.6 Facilitating Strategic Partnerships

The Qualmark is a government/private sector partnership between TNZ and New Zealand Automobile Association. Qualmark licenses professional and trustworthy New Zealand tourism businesses to help international and domestic travellers select places to stay, things to do and ways to get around.

TNZ has a strategic relationship with Education New Zealand to ensure the long-term development of the tourism industry.

New Zealand's five main tourist regions formally agreed with TNZ to use the 100% Pure brand. The strategic partnership and joint marketing venture significantly increases the profile of the 100% Pure campaign.

4.5 South Africa

The NTO for South Africa is South African Tourism (SAT).

4.5.1 Background

SAT is the national agency responsible for the international marketing of South Africa as a preferred destination.

4.5.2 Market Research

SAT has developed detailed market segmentation reports for key markets to help the trade market South Africa. Each report gives insights into the whole of the market in each country and not the section we are currently seeing. Against this research, SAT has developed activation plans for each market. Interest in adventure travel by country is indicated .

4.5.3 Destination Branding

Positioning statement: *It's impossible!*

The positioning vaguely supports adventure travel. It attempts to communicate that in South Africa, nothing is impossible and everything is possible. It embraces the positive, optimistic nature of South Africa, the desire to please and the belief that anything can be done. It relates specifically to the South African brand of hospitality, which has a genuine heart and is warm, welcoming, generous and inclusive. It demonstrates the awesome experiences this country has to offer in terms of “Real Wonder; Fusion & Beat; Awesome Sensory Experience and Humanity & Freedom – in short, all of the real wonder that is just waiting to be discovered here on the southern tip of Africa” (South African Tourism, 2006). It also attempts to redefine the meaning of leisure travel by positioning the country as being the ultimate ‘explorer destination’, new and different in its diverse offerings to those keen to enjoy new perspectives and discoveries, and grow as people.

SAT states that it wants to ‘sell’ South Africa to the ‘traveller’ as opposed to the ‘tourist’, as it believes these are the types of people who would be more enthusiastic about

reconnecting with what the country offers. SAT has identified 13 key countries and regions that it targets.

4.5.4 Advertising and Promotional Activities

The annual INDABA is a key component of SAT's drive to market this country as a leading tourist destination both domestically and internationally. The INDABA is very focused in its tasks of promoting a diverse range of quality tourism products to the international market, equally representing the diversity of South Africa's people, culture and endemic landscapes for the economic benefit of all.

The exhibitor categories include accommodation, tour operators, game lodges, transport, online travel, media publications and industry associations. Outdoor exhibitors include transport, camping and safari companies. The profile of visitors attending the show includes tour operators, adventure tourism, sports tourism and ecotourism.

SAT's business tourist website encourages unusual experiences in the form of adventure travel.

In New York recently, SAT premiered the only 3D Imax destination cinema production in the world. The film (Wild Safari 3D, a South African Adventure) was a major success and was the 30th most popular movie in the US.

4.5.5 Booking Facilitation

The website directs visitors to a variety of adventure activities and accommodation options (see Appendix 22).

4.5.6 Facilitating Strategic Partnerships

SAT partnered with ABSA Bank to sponsor the Emerging Tourism Entrepreneur of the Year Award. This award is directed at achieving the meaningful participation of previously disadvantaged people and small, medium and micro enterprises in South Africa's tourism sector.

4.6 Comparative Analysis

The summary in the table below was created to compare the level of support for the various activities described in the literature study relative to that of SAT. Levels of evidence found in the exploratory study have been classified as low, medium and high.

Table 4.1: Best practices and activities of NTOs

ACTIVITY	Level of Support found in Exploratory Research			
	CTC	TA	TNZ	SAT
Research & knowledge management				
- Perceptions & satisfaction levels of adventure tourists	Low	Low	High	Low
- Trends in adventure tourism	High	Medium	High	Low
- Knowledge of perceptions, attitudes & motivations of adventure travellers	High	Medium	Medium	Low
- Impact of adventure tourism on tourists and destination	Low	Low	Low	Low
- Cross-cultural differences in perceptions of adventure	Low	Low	Low	Low
- Tracking studies of campaign effectiveness	High	High	Low	Medium
- Research balanced scorecard	High	Low	Low	Low
- Communication of research results to stakeholders	High	High	Low	Low
Destination branding				
- Clearly defined adventure target market	Medium	High	High	Low
- Brand positioning communicates adventure proposition	High	High	High	Medium
- Positioning communicates uniqueness of adventure experience	High	High	Medium	High

Advertising & promotional activities				
- Advertising and promotional activities communicate adventure proposition	High	High	High	Medium
- Effective use of Internet to establish adventure proposition	Medium	Medium	Medium	Medium
- 360 degree campaign to promote adventure tourism	High	High	High	Medium
- Direct engagement with:				
o Consumer	Medium	High	Medium	Low
o Travel intermediaries	Medium	High	High	Medium
o Media	High	High	High	Low
Booking facilitation				
- Internet tools that enable booking	High	Medium	High	Medium
- Grading system to guide adventure traveller	Low	Medium	High	Low
Strategic partnership facilitation				
- Evidence of strategic partnerships	High	Medium	High	Medium

Based on the exploratory analysis, it is evident that SAT is not giving the same level of support to adventure travel compared to competitive destinations.

CHAPTER 5: RESEARCH DESIGN AND METHODOLOGY

5.1 Introduction

The main objective of this study was to determine if SAT is taking a leadership role in establishing a competitive adventure travel industry. With adventure travel, where there is a limited theoretical base, it is a truly challenging task for the researcher to suggest an effective guideline from which empirical applications can be developed.

Both locally and internationally, adventure tourism has hardly been a topic of empirical research in travel and tourism studies. Sung (2000) suggests that considering the nature of travel and tourism, which is highly active and industry-orientated, research is most useful when it contributes to practical applications that help understand and address managerial issues.

5.2 Statement of Problem and Subproblems

Main research problem: Is South African Tourism giving enough support for the establishment of a competitive adventure travel industry?

Subproblem 1: To determine what best practices and activities are being undertaken by national tourism organizations to establish a competitive adventure tourism industry.

Subproblem 2: To determine whether South African adventure travel service providers believe they are being adequately supported by SAT to ensure a competitive adventure travel industry.

5.3 Limitations

The study of activities and best practices of NTOs was limited to the information available in the public domain, with particular reference to the Internet.

It is important to note that the South African adventure travel industry is highly fragmented, consisting of many small entrepreneurial companies. This may contribute to the difficulty of obtaining a consolidated opinion. The measurement is to a large extent based on perceptions of individuals interviewed. Another limitation involved the irregular working hours and remote destinations of tour operators, which means that they are difficult to contact.

The boundaries of what activities constitute adventure tourism are not very well defined. Consequently the study examined only:

- Adventure tour operators as listed by the IMC of South Africa.
- Adventure activities available in South Africa as listed on the IMC, www.southafrica.info.

5.4 Methodology

To meet the objectives of this research, both qualitative and quantitative methods were used. Bryman (1988) explains that the two methods are complementary rather than competing, especially for exploratory research. As Henderson (1990:181) concludes, “the value of multiple methods is that they lead to multiple realities”. An explicit discussion of all the methods employed to gather primary information follows.

As there has been no previous research on adventure tourism in South Africa, exploratory research was employed. Both primary and secondary data were regarded as essential. Information that is already available is known as secondary data and is usually in written form. However, this information is increasingly made available via computers and other electronic sources (Youell 1998:202).

In an effort to search for a conceptual framework of what needs to be done to establish a competitive adventure travel industry, a comprehensive secondary data study was undertaken. This was done also to establish the levels of support and best practices undertaken by competitive NTOs. The competitive adventure destinations evaluated were Australia, New Zealand and Canada. These countries were selected on the basis of the high level of transparency demonstrated by their NTOs, as well as the fact that information is readily available in English. Australia has also been targeted as a key

competitor by SAT. A critical examination of their respective websites and government policies was undertaken to identify activities that pertained only to establishing an adventure travel industry.

The second stage of the study involved semi-structured telephone interviews that aimed at eliciting critical issues and exploring the key factors that South African tour operators deem necessary for the establishment of an adventure travel industry. Interviews are considered to be the most appropriate method to obtain information about perceptions, attitudes and beliefs (Finn et al., 2000). Due to the remoteness, geographical spread and irregular office hours of respondents, the majority of interviews were conducted via cellphone. 25 adventure operators were randomly selected, various attempts were made to contact all respondents, and finally 18 interviews were conducted, which resulted in a 72% response rate. The interviews were conducted over a period of two weeks. The interviews differed in length, with an average time of 12 minutes.

Table 5.1: Advantages and disadvantages of telephone surveys

Advantages	Disadvantages
<ul style="list-style-type: none"> - Lower costs than personal interview - Expanded geographic coverage without dramatic cost increase - Uses fewer, more highly skilled interviewers - Reduced interviewer bias - Fastest completion time - Better access to hard-to-reach respondents through repeated callbacks - Can use computerized random-digit dialling - Computer-assisted telephone interviewing - Responses can be entered directly 	<ul style="list-style-type: none"> - Response rate is lower than for personal interview - Higher costs if interviewing geographically dispersed sample - Interview length must be limited - Many phone numbers are unlisted or not working - Some target groups are not available by phone - Responses may be less complete - Illustrations cannot be used

into a computer file to reduce error and costs	
--	--

Source: Adapted from Cooper and Schindler (2003)

5.5 Sample

The sample frame consisted of the adventure activities available in South Africa as listed on the IMC's website, www.southafrica.info. It was decided not to use adventure activities listed on SAT's website (www.southafrica.net) as a sample frame for the following reason:

- The listed companies are not necessarily specialist adventure companies. If a hotel has mountain bikes, it is listed under the adventure section.

A random stratified sample of 25 South African adventure travel service providers was selected. The subjects of the study consisted of owners and marketing managers of organizations, as they were deemed to be informed, reflecting their particular experience and outlook on the research area.

Table 5.2: Sample of adventure travellers studied

Activity	Number of Listings	Sample
General adventure trips	20	5
Abseiling, rapp and bungee jumping	7	5
Paragliding, hang-gliding & flying	9	1
Rock climbing & mountaineering	18	2
Mountain biking	9	5
Canoeing, rafting & kayaking	9	5
Hiking	10	0
Horse riding & trails	28	3
Skydiving & base jumping	11	1
Scuba diving	14	3

Total	135	25
-------	-----	----

5.6 Data Collection

A telephone interview was employed for data collection.

5.7 Questionnaire

A structured questionnaire was designed to answer a series of specific questions. The questions were derived from the activities offered by competitive tourism organizations to support adventure travel industries. The interview instrument was designed in seven sections. Section 1 explored the demographics of the interviewer, especially the predisposition of local vs. international customers. Section 2 established the perceptions about research that SAT conducts. Section 3 investigated the perceptions of destination branding, whilst section 4 investigated awareness of advertising and promotions. Section 5 examined the insight of participants into booking facilitation and section 6 determined awareness levels of strategic partnerships facilitated by SAT. Finally, section 7 determined if adventure tour operators perceive SAT to be taking a leadership role in establishing a competitive adventure travel industry.

Respondents were asked for their own views and experiences in order to develop a clear picture of the current situation. They were encouraged to speak freely about the topic and every effort was made to ensure that the questions would not be misleading.

5.8 Data Analysis

The results were collated and analysed. Exploratory data analysis was done and represented in bar and pie graphs.

5.9 Hypothesis Testing

During the course of the research, it was established that the majority of adventure companies had a poor or no relationship with SAT. They appeared to be internally

focused and unaware of SAT's efforts. Subsequently the question arose if the company's size or location had an impact on their ability to attract foreign visitors. Hypotheses were tested in this regard.

CHAPTER 6: RESULTS AND DATA ANALYSIS

6.1 Introduction

Data analysis is the process of aggregating the individual responses or raw data (Hague & Jackson 1996:161) and usually involves reducing accumulated data to a manageable size, developing summaries, looking for summaries and applying statistical techniques (Cooper & Schindler 1998:78).

The purpose of this chapter is to summarize the results obtained from the questionnaire. Each section of the questionnaire, namely demographics of operators, research, destination branding, advertising and promotional activities, booking facilitation and facilitating strategic partnerships, is discussed as appropriate and graphs are included to assist with data interpretation. Finally, it will be established if adventure tour operators believe that SAT is taking a leadership role in creating and promoting adventure travel initiatives.

6.2 Data Analysis

The questionnaire used to obtain this study was administered via a telephone interview. The responses were entered into an MSExcel spreadsheet and analyzed thereafter.

6.2.1 Demographics of Tour Operator

To determine the location of the companies, the adventure activities in which they participate, how many people they employ and the percentage of international customers versus local customers, the respondents were asked certain questions. The results are discussed below.

Question 1: Name of company and location

To establish this, address details were asked as well as the proximity of the closest town.

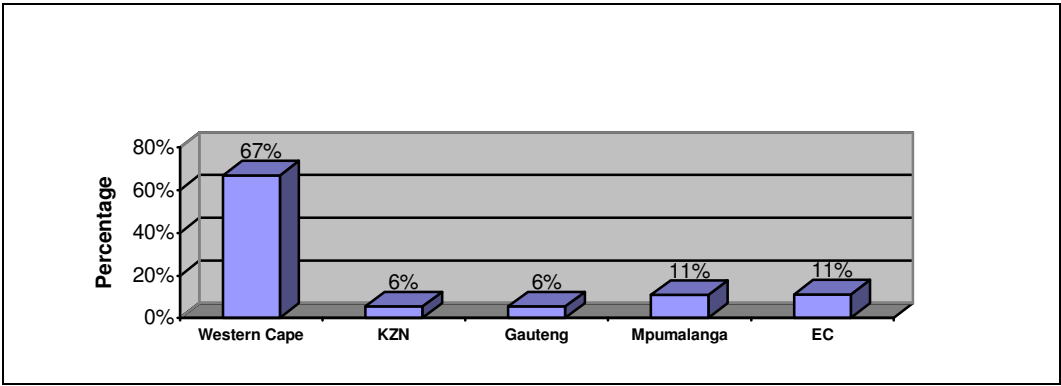


Figure 6.1: Province in which tour operator is situated (N=18)

There is a disproportionate number of companies located in the Western Cape. More than 67% of tour operators are situated there, followed by 11% in both Mpumalanga and the Eastern Cape.

Size of town in which company is situated

Respondents were asked to indicate the name of the closest town. The size of the town was then verified via the MapStudio Road Atlas of South Africa.

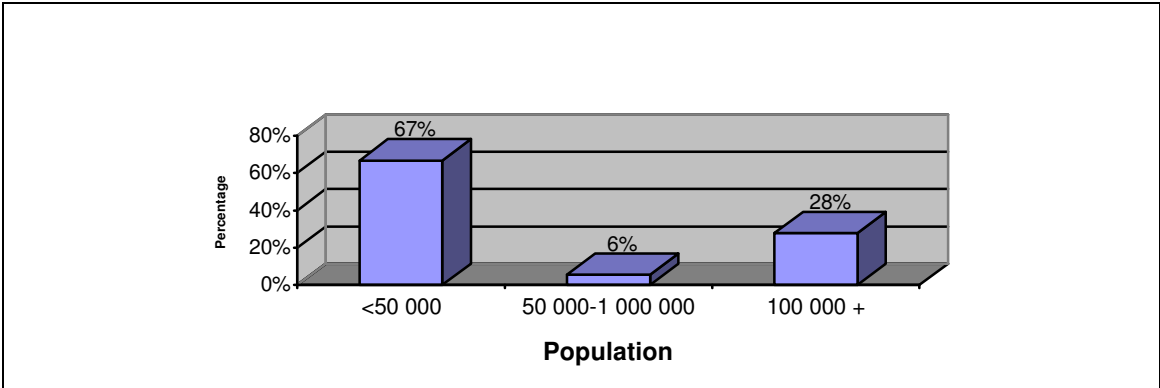


Figure 6.2: Population of town in which company is situated (N=18)

It is notable that the majority of adventure companies are located in extremely remote areas. 67% of adventure operators are situated either in towns or in the proximity of towns with populations of less than 50 000 inhabitants.

Question 2: What type of adventure activity do you specialize in?

Respondents were asked to indicate all the activities in which they specialized.

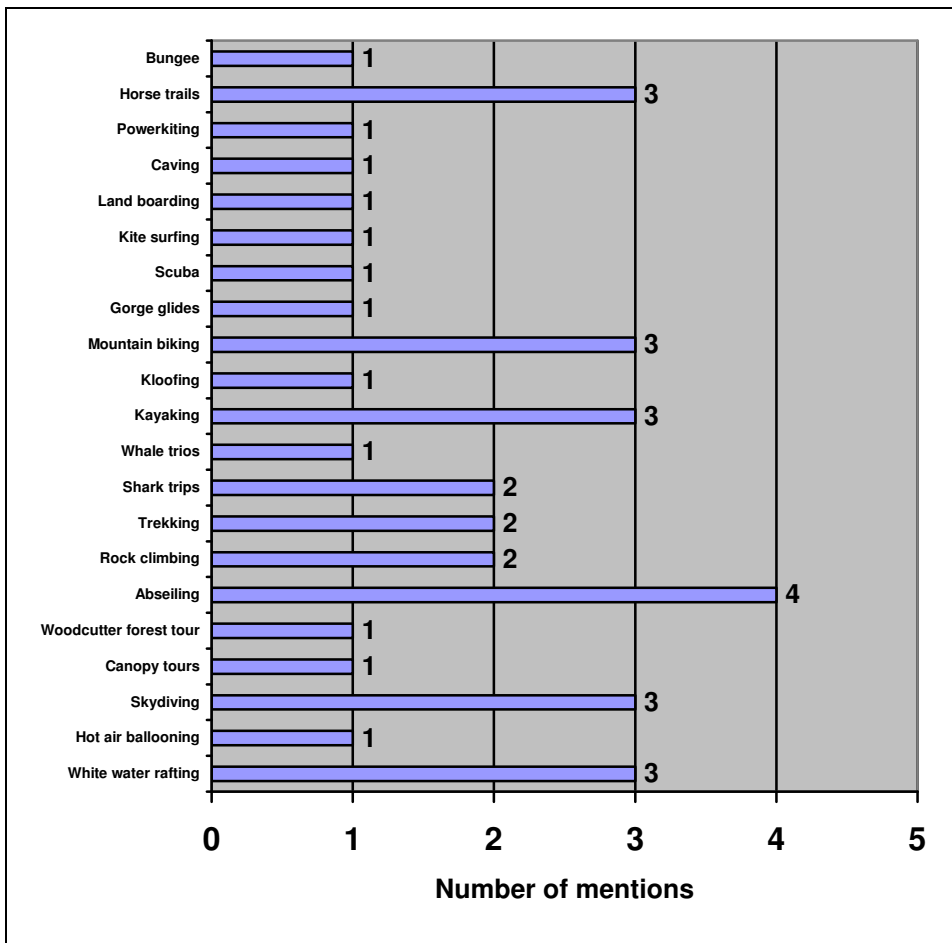


Figure 6.3: Type of adventure activity offered (N=18)

Adventure tour operators offer a wide variety of niche activities catering for an equally wide variety of tastes and interests. Amongst 18 adventure operators, 21 types of activities were catered for.

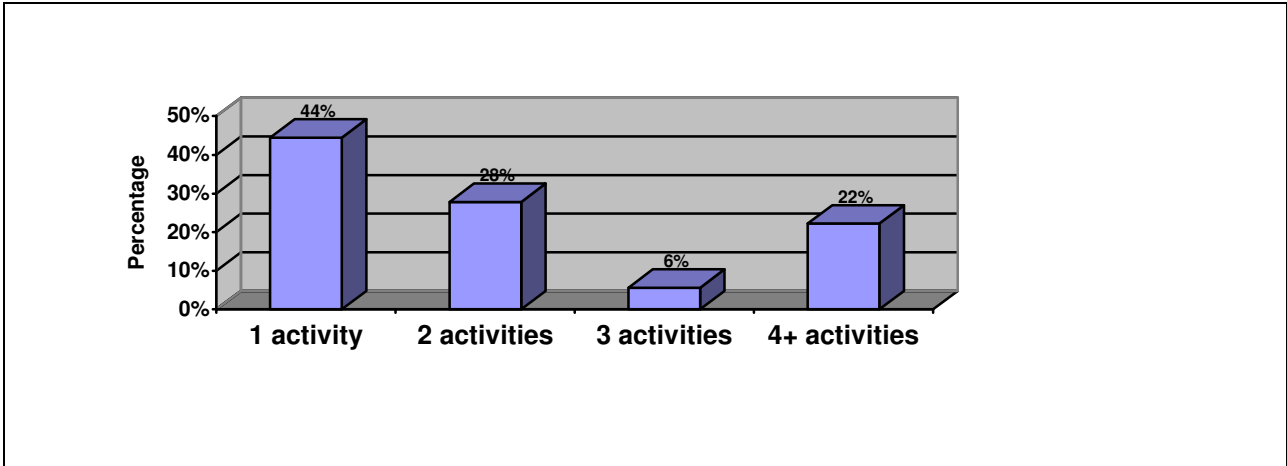


Figure 6.4: Number of types of activities offered

44% of companies specialized in one activity only. 20% of companies offered two activities, while the remainder catered for more than one interest.

Question 3: What is the size of your company?

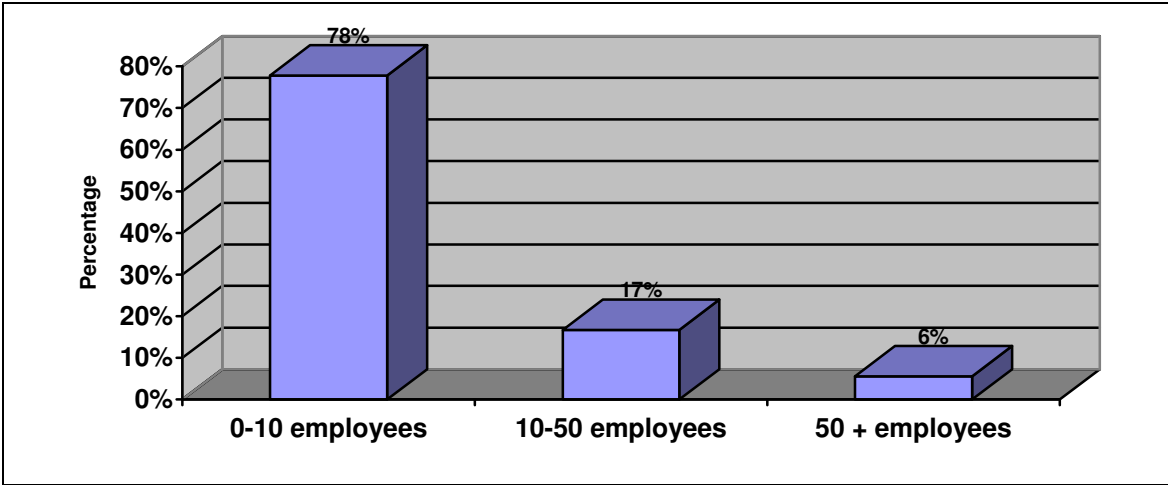


Figure 6.5: Number of employees

78% of the tour operators were small entrepreneurial companies that permanently employed less than 10 people. 17% of the respondents employed between 10 and 50 people, whilst only 6% employed more than 50 people.

Question 4: Estimate the proportion of international customers vs. local customers.

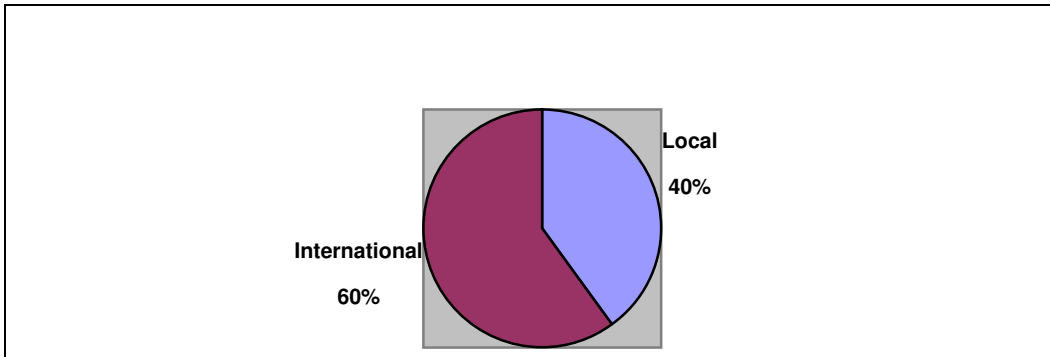


Figure 6.6: Local vs. international business

The number of foreign tourists vs. local tourists differs dramatically from company to company. However, it is estimated that on average 40% of all customers are international and 60% are local.

For the international visitors, the sample mean was calculated to be 40%. So with 95% confidence, the percentage of international visitors that visit adventure companies is between 28.3561 ($40 - 11.6439$) and 51.6439 ($40 + 11.6439$).

With 95% confidence the percentage of local visitors is between 48.3561 and 71.6439.

6.2.1.1 Hypothesis A

A hypothesis test was done to determine whether the size of the company had an influence on the proportion of local and international visitors. The test grouped the number of people employed as 0-10 as the first group and combined the other two groups into a single group of >10 people employed to test whether there was a difference in the number of international visitors between the two groups. The assumption was made that the groups had normal distributions.

The greatest problem with the data was the small sample size, which made it very difficult to create groups in the data to test the groups against one another.

A hypothesis test was carried out on the differences of the means of the sample. A T-test was used instead of the Z-test because of the small sample size. The groups were combined, as tests cannot be done where there are groups with only one observation.

H_0 : The average percentage of international visitors is the same for both groups.

H_1 : The average percentage of international visitors differs between the groups.

The table below gives the estimated percentages of international visitors for each of the two groups. The number of observations, the mean and the standard deviation for each group are given.

Table 6.1: Estimated percentage of international visitors for each group

	0-10 people	>10 people
Average	42.85714286	30
Sample size	14	4
Standard deviation	27.57606862	11.54700538
T-value	0.894427191	
Critical value	2.119904821	

The T-test statistic calculated is 0.8944. The critical value for the test is 2.1199, which is calculated with a significance level of 5% and uses 16 degrees of freedom.

0.8944 is within the bounds of -2.1199 and 2.1199 . The null hypothesis, H_0 , is not rejected and it can therefore be concluded that the mean number of international visitors is the same for both groups.

The size of the company does not influence the proportion of international visitors. This also means that the mean number of local visitors is the same for both groups.

6.2.1.2 Hypothesis B

A further hypothesis test was done to determine whether the size of the town in which the company is situated has an influence on the number of local vs. international customers.

This test grouped the size of the town as <50 as the first group and combined the 50-1 million group and 1 million plus group to test whether there was a difference in the number of international visitors in the two groups. The assumption was made that the groups had normal distributions.

H_0 : The average percentage of international visitors is the same for both groups.

H_1 : The average percentage of international visitors differs between the groups.

The table below shows the estimated percentages of international visitors for each of the two groups. The number of observations, the mean and the standard deviation for each group are given.

Table 6.2: Estimated percentage of international visitors by town

	Smaller towns	Bigger towns
Average	36.25	47.5
Sample size	12	6
Standard deviation	22.47473329	30.78148794
T-value	-0.887065525	
Critical value	2.119904821	

The T-test statistic calculated is -0.88706 . The critical value for the test is 2.1199 , which is calculated with a significance level of 5% and uses 16 degrees of freedom.

-0.88706 is within the bounds of -2.1199 and 2.1199 . The null hypothesis, H_0 , is not rejected and it can therefore be concluded that the mean number of international visitors is the same for both groups.

This also means that the mean number of local visitors is the same for both groups. The location of the company does not influence the number of international and local visitors.

6.2.2 Market Research

Questions were asked to determine the awareness levels of research that SAT undertakes and the extent to which this research assisted respondents with business decisions.

Question 5: Are you aware of any market research that SAT conducts on adventure travel?

Question 6: If so, does it assist you in making any business decisions?

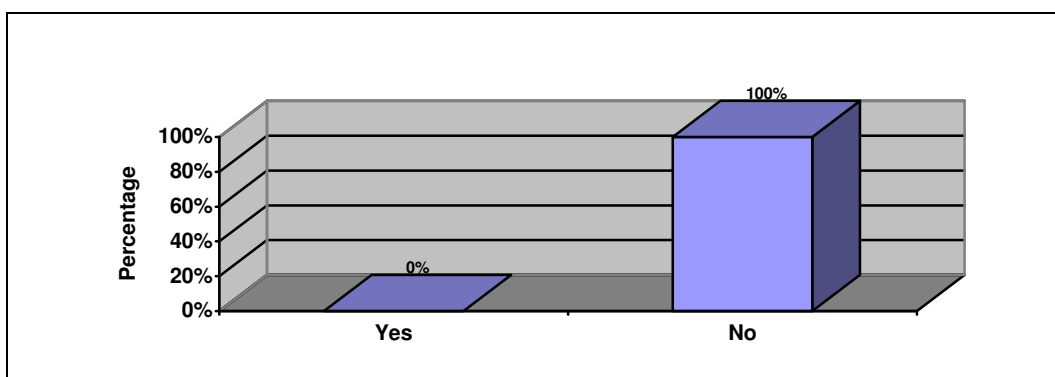


Figure 6.7: Awareness levels of research undertaken by SAT

100% of respondents were not aware of any research that is conducted by SAT on adventure tourism. Hence, it was not possible for the information to assist them with decision-making.

6.2.3 Destination Branding

Questions were asked to determine if adventure service providers have insight into the positioning and target market of SAT.

Question 7: Do you know how SA Tourism positions South Africa internationally?

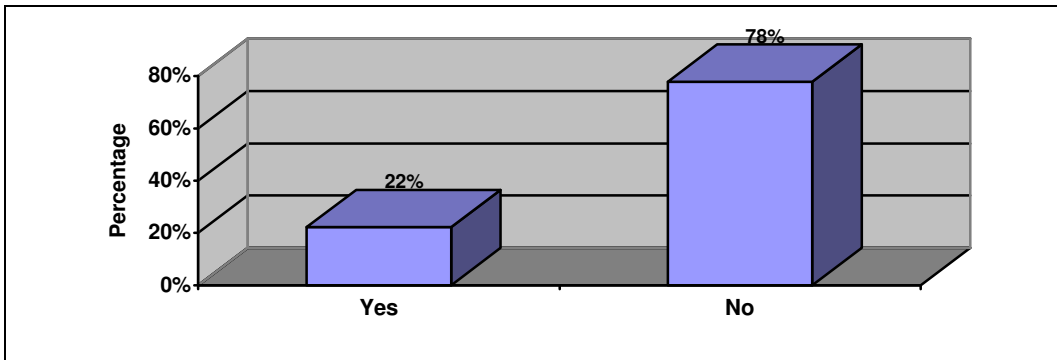


Figure 6.8: Awareness of how SAT positions South Africa internationally

78% of adventure travel operators surveyed did not spontaneously know how SAT positions South Africa internationally, whilst the remaining 22% claimed that they did know.

Question 8: The current positioning statement “It’s impossible” contributes to establishing South Africa as an ideal adventure destination.

Respondents were asked if the current positioning slogan contributed to establishing South Africa as an adventure destination. This question was asked to determine if the slogan had any credibility.

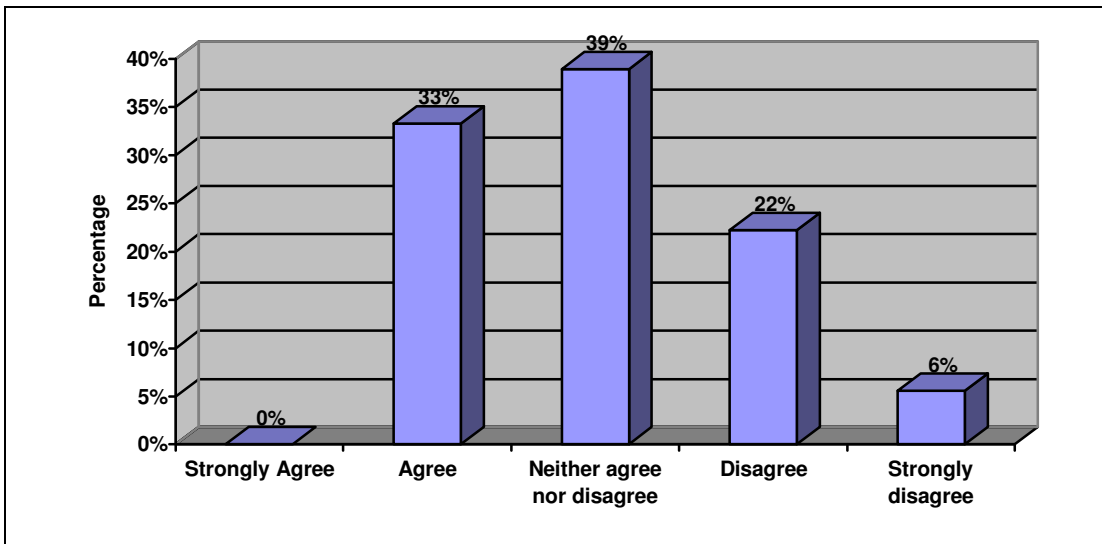


Figure 6.9: Contribution of current positioning statement

33% of respondents believed that the current positioning statement “It’s impossible” contributes to establishing South Africa as an adventure destination, whilst 39% were unsure. The remaining 28% felt that it did not contribute to establishing South Africa as an ideal adventure destination.

Question 9: Are you sure of who SAT’s exact target market is?

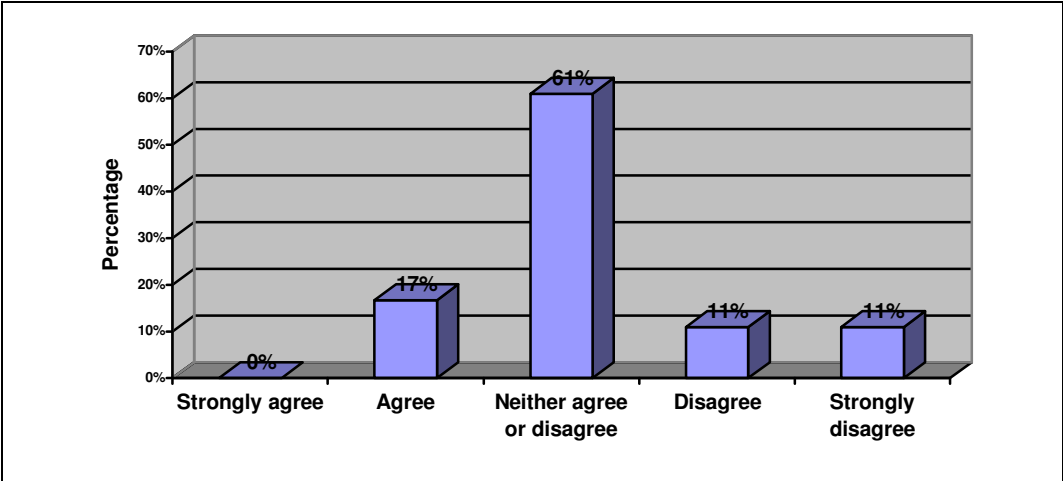


Figure 6.10: Awareness of SAT's exact target market

Only 17% of respondents believed that they knew who SAT’s target market was, whilst 61% were unsure and 22% did not know.

Question 10: Does SAT’s target market correspond with your target market?

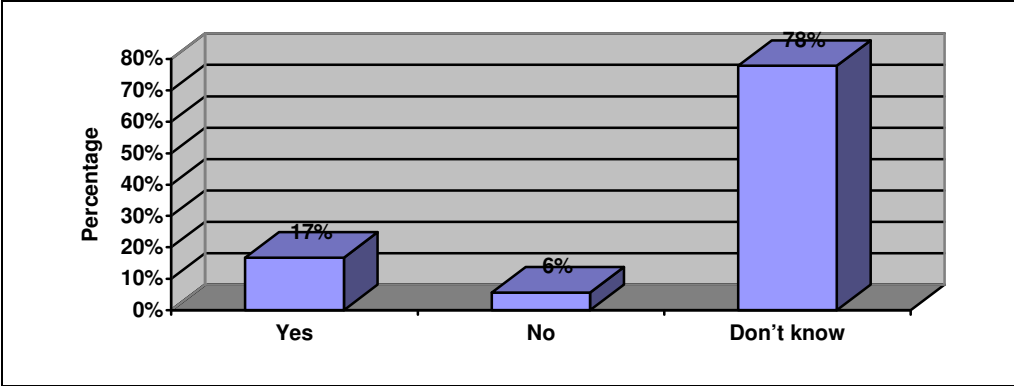


Figure 6.11: Correspondence between target markets of SAT and company

Only 17% of respondents knew who SAT is targeting, 6% did not know and the remaining 78% were unsure. As most adventure operators did not know who SAT's target market was, they did not know if their target market corresponded with that of SAT.

Question 11: SA Tourism encourages and assists adventure companies to develop new innovative products.

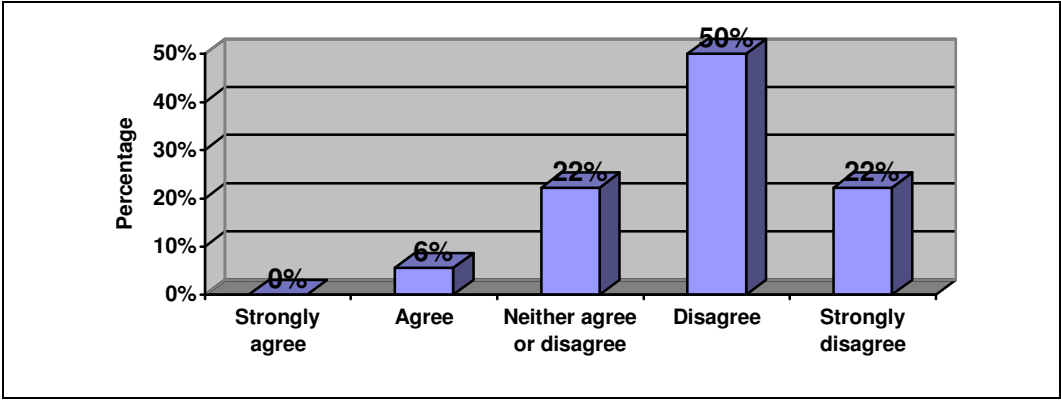


Figure 6.12: Encouragement of development of new innovative products

Only 6% felt that SAT encourages tour operators to develop new innovative products, 22% neither agreed nor disagreed, whilst 72% felt that they were not encouraged to develop new products.

Question 12: Which other adventure destination do you regard as South Africa's biggest competitor and why?

Respondents were asked to indicate which adventure destination they perceived as South Africa's biggest competitor. They were also asked to give reasons for their response.

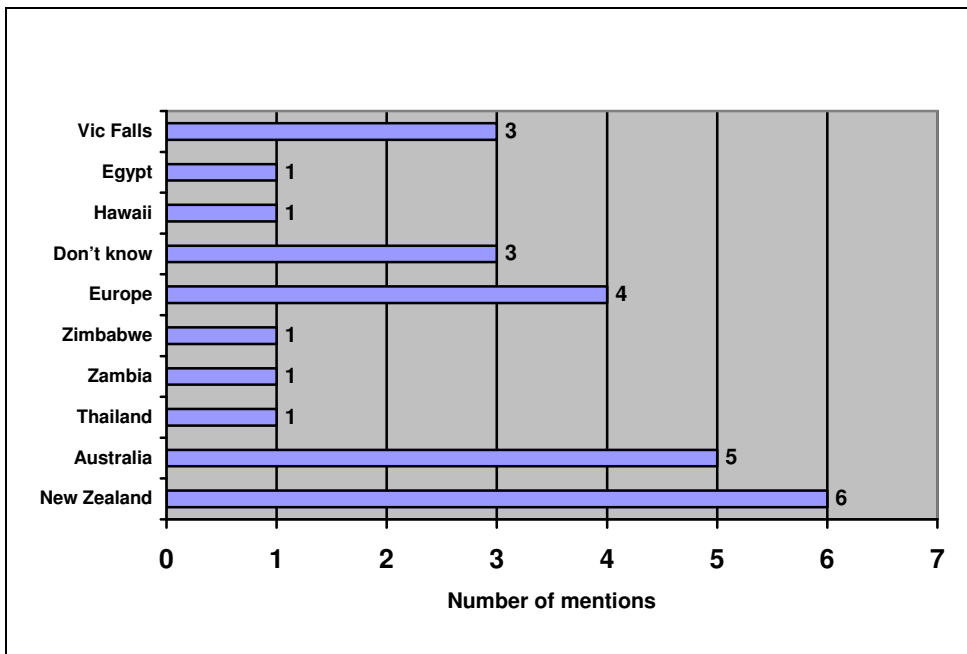


Figure 6.13: Competitive destination (N=18)

The majority of adventure tour operators regarded New Zealand as the biggest competitor, followed by Australia and Europe.

Specific reasons given for these destinations include:

- New Zealand: marketed well, partially funded by government, each town geared to support adventure tourism, transport routes are planned to support specific adventure routes, versatile adventures, safe.
- Australia: safe, marketed well, supported by tourism authorities, well supported infrastructure, less crime.
- Victoria Falls: Cheaper, less crime, many activities concentrated in one area.
- Thailand: Safe and inexpensive.
- Europe: well known for certain activities, e.g. mountain biking.

6.2.4 Advertising and Promotional Activities

Questions were asked to ascertain whether adventure tour operators were aware of any advertising or promotional activities done by SAT to establish a competitive adventure travel industry.

Question 13: Describe any advertising or promotional activities that you know of that SA Tourism does to establish South Africa’s adventure travel industry.

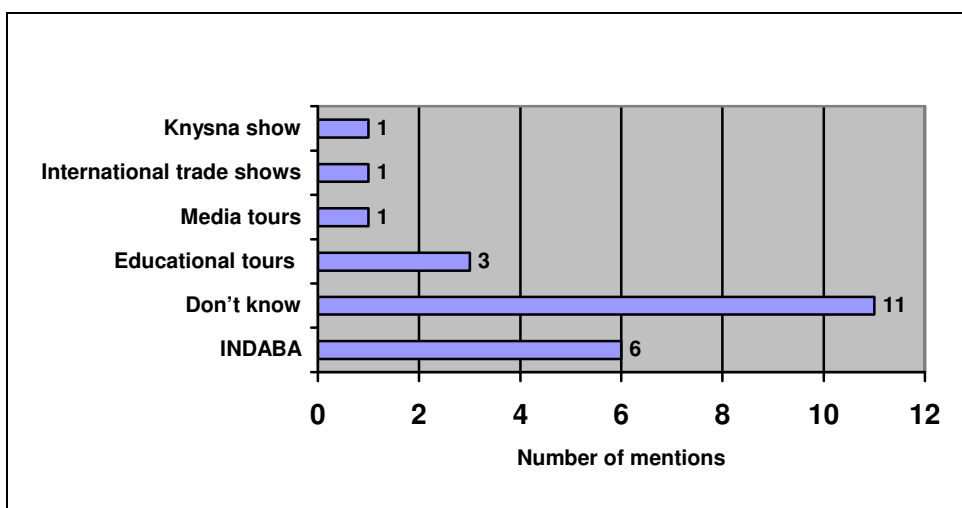


Figure 6.14: Type of adventure activity offered (N=18)

Most respondents did not know of any advertising or promotional activity to support adventure travel. Those that were aware of any activity mentioned the INDABA, followed by educational tours for overseas agents.

Question 14: Does the annual INDABA adequately support adventure tourism? Comment on positives and negatives.

Not one tour operator surveyed had attended the INDABA as they felt the costs were prohibitive for small companies. They also believed it was more appropriate for mainstream tourism and that it did not support adventure tourism adequately.

Question 15: The South African adventure travel industry often gets mentioned in international specialist magazines and programmes.

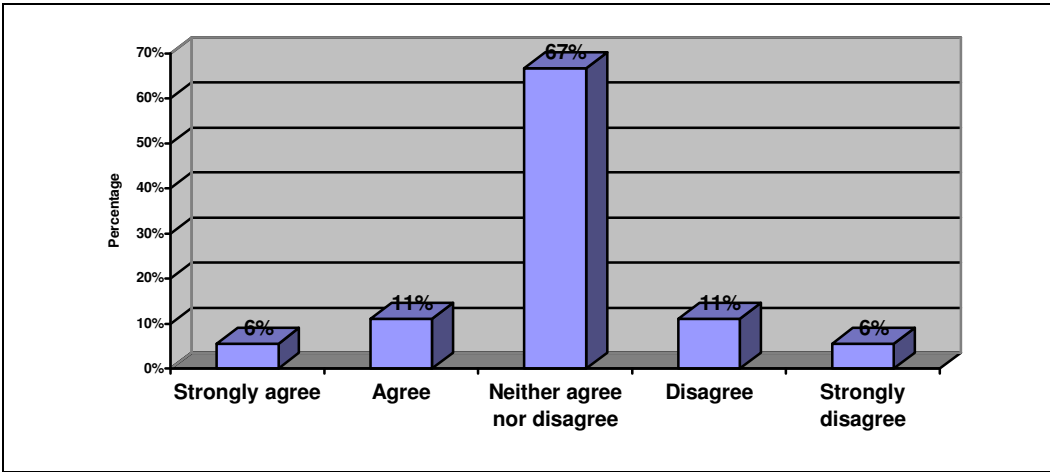


Figure 6.15: Mention in international specialist magazines and programmes

Only 20% of all adventure operators surveyed felt that the South African adventure industry was mentioned in international specialist magazines and programmes. The rest were unsure or felt that it did not happen.

6.2.5 Booking Facilitation

Questions were asked to determine if SAT provided adequate assistance with booking facilitation.

Question 16: SA Tourism’s website provides adequate information about your specialist adventure activity.

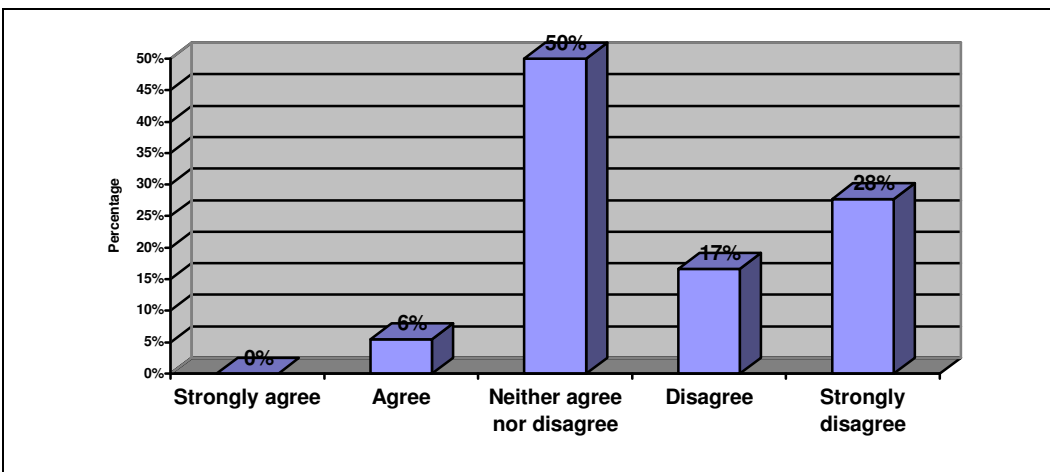


Figure 6.16: Adequacy of information on SAT's website about adventure activity offered

High levels of dissatisfaction were expressed with the content of SAT’s website, with only 6% of respondents that were happy. From the response it is evident that the majority of respondents (60%) were unfamiliar with the content of SAT’s website. The remaining 17% felt the website did not have adequate information, whilst a further 28% disagreed strongly with this statement.

Question 17: Does SAT’s website facilitate bookings and travel planning for your company?

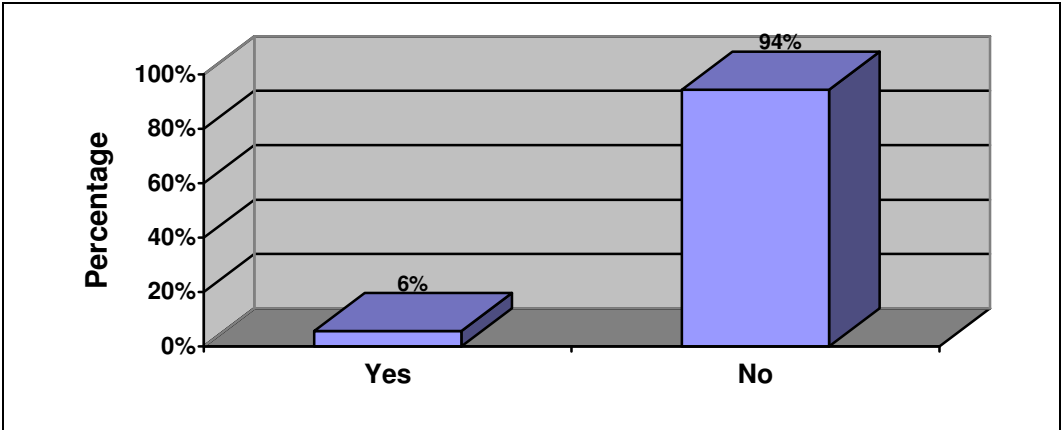


Figure 6.17: SAT’s facilitation of bookings and travel planning

94% of respondents felt that SAT offered no assistance, whilst only 6% felt SAT assisted.

Question 18: Are you satisfied with the facilitation of bookings and travel that SA Tourism provides?

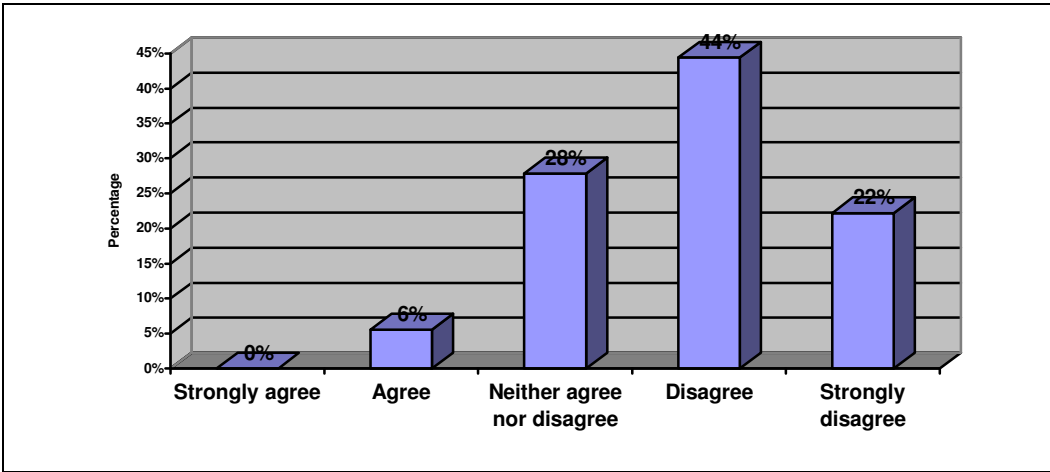


Figure 6.18: Degree of satisfaction with SAT’s facilitation of bookings and travel

6% of respondents were satisfied with the service that SAT provides. 28% neither agreed nor disagreed, whilst 66% disagreed.

Question 19: There should be some form of grading system that indicates safety standards for consumers in the South African adventure travel industry.

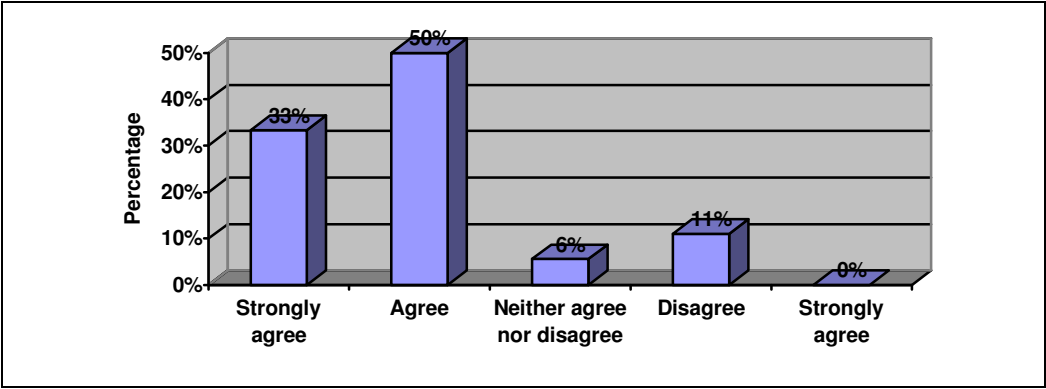


Figure 6.19: Opinion regarding grading system

83% of respondents were in favour of some form of grading system, while 14% did not want any such system.

6.2.6 Facilitating Strategic Partnerships

To determine if tour operators were aware of any strategic partnerships that SAT were involved in that could facilitate growth, the respondents were asked the following question:

Question 20: Are you aware of any strategic partnership that SA Tourism has, that might facilitate the growth of adventure travel (e.g. with airlines, television channels, such as Discovery)?

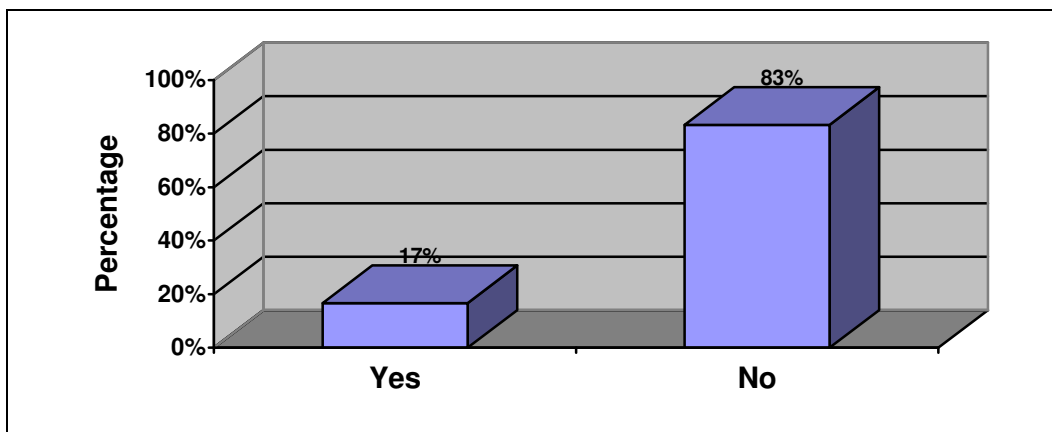


Figure 6.20: Awareness of strategic partnerships

83% of respondents were not aware of strategic partnerships, compared to 17% who were aware of these partnerships.

6.2.7 General

Question 21: South African Tourism is taking a leadership role in creating a competitive adventure travel industry.

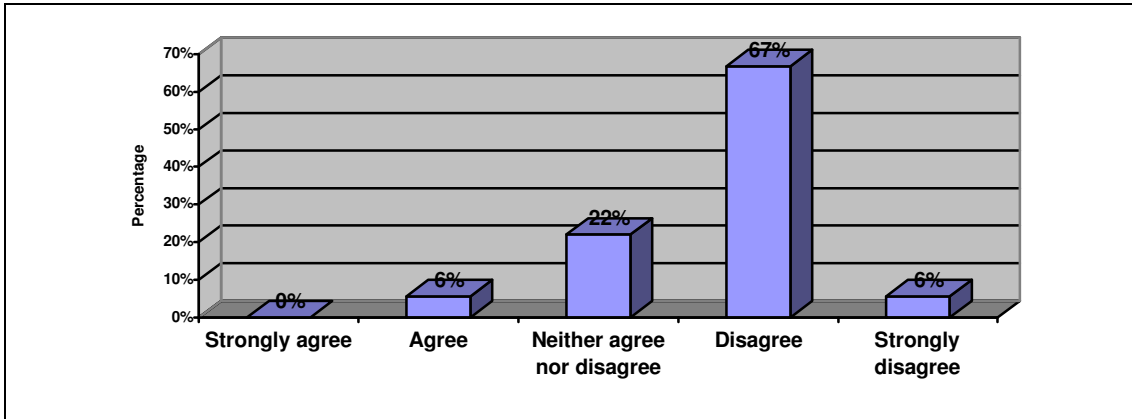


Figure 6.21: Leadership role of SAT in creating a competitive adventure travel industry

Only 6% of respondents felt that SAT was taking a leadership role in creating a competitive adventure travel industry. 22% did not know and the remainder (73%) felt that SAT was not taking a leadership role.

CHAPTER 7: CONCLUSIONS AND RECOMMENDATIONS

The results for each section in the questionnaire were tabulated and shown in graphs in Chapter 6. Evidence of best practices and activities by NTOs to support a competitive adventure travel industry were summarized in Chapter 4.

For each section, a brief summary of the findings and a conclusion with recommendations are given. The recommendations include findings from best practices of competitive NTOs.

7.1 Demographics of Adventure Tour Operators

The first section of the questionnaire dealt with the demographics of the tour operators that participated in this study. Specific attention was given to their location, size, customer base and type of activity in which they specialized.

7.1.1 Findings

The majority of adventure tour operators are located in remote areas, particularly in the Cape Province. The types of activities they provide are often dependent on the area as well as the natural surroundings. South Africa's adventure industry offers a wide range of niche products to suit a variety of tastes and interests, with most companies specializing in more than one activity. It is noteworthy that the majority of adventure travel operators are small entrepreneurial establishments that employ less than 10 people. Whilst the focus on overseas tourists differs significantly from company to company, it is significant that on average 40% of all business is generated by overseas visitors.

It is extremely difficult to communicate effectively with adventure operators due to the remoteness of the companies as well as the fact that the owners are often personally involved in the activity, thereby limiting their availability.

It is estimated that in 2005, 14,7 million South Africans took at least one trip compared to the 7,4 million foreigners that visited South Africa in the same year. Considering that international tourism contributes 40% of adventure business, it could be argued that international tourists show a higher propensity to participate in adventure tourism than locals.

7.1.2 Recommendations

If SAT wants to establish a successful adventure industry it is important that it communicate successfully with all the role players. To do this it must gain insight into the demographics and characteristics of adventure tour operators. Communication tools and methods need to be developed that recognize the unique circumstances of adventure tour operators. Tourism news that is delivered electronically on a daily basis, a monthly travel magazine that contains specific articles on adventure travel and workshops with tour operators where best practices are discussed and shared are recommendations that can be implemented. SAT can consider working with regional tourism bodies to further enhance adventure tourism.

7.2 Adventure Travel Research

The second section of the questionnaire dealt with availability and usefulness of adventure tourism research undertaken by SAT.

7.2.1 Findings

Not one respondent was aware of any adventure tourism research conducted by SAT; they therefore concluded that current research could not assist them in making business decisions.

SAT is not undertaking research into the adventure travel that would be useful or relevant to tour operators. Neither is it encouraging a learning industry, as no one is aware of research that could assist them in making profitable business decisions.

7.2.2 Recommendations

If SAT is interested in developing a competitive adventure travel industry, it needs to obtain a better understanding of the potential size, characteristics and interests of adventure travellers and their needs. This will also assist them with long-term strategic planning. Canada provides a rich source of information to businesses and marketers that want to increase or retain adventure enthusiasts. Both Australia and New Zealand have segmented their information statistics by type of traveller so that they can gain insight into key behaviours and characteristics of consumers. Tourism Australia and the Canadian Tourism Commission have established separate research organizations to produce timely, relevant and accurate research and are promoting the important role research plays in underpinning informed decision-making. Tourism Australia even provides a consultancy service that offers assistance in designing surveys and questionnaires and in regional tourism and other significant issues.

If SAT wants to establish itself as a partner in developing adventure tourism, it needs to ensure credibility amongst stakeholders. Greater transparency coupled with believable, useful data will help this process. Canada uses a research balanced scorecard to communicate its research objectives and performance targets. Tourism Australia invests considerable effort in tracking the marketing efforts. SAT also needs to develop more effective ways of distributing information to stakeholders.

7.3 Destination Branding

The third section of the questionnaire focused on the knowledge and perceptions of destination marketing done by SAT. Its aim was to determine whether adventure tour operators were aware of South Africa's international positioning and target market. Furthermore the section considered product development and established the competition as seen by stakeholders.

7.3.1 Findings

Generally respondents were unaware of how SAT positions South Africa and whom they actively target. Generally they did not know if their individual target markets corresponded with those of SAT's target market. They did, however, feel the positioning statement "It's impossible" could contribute to establishing SAT as an adventure destination.

The adventure tour operators in this study were unanimous in their belief that SAT did not encourage them to develop new innovative products. There was no consolidated view of South Africa's competition, although New Zealand was mentioned most often followed by Australia and the Victoria Falls.

The inadequate communication from SAT is once again at issue here. No one seems to be motivated or interested in what the country is trying to achieve - individual companies are merely doing their own thing. Adventure travel operators are not aligning their products to the value proposition of South Africa; hence little synergy is achieved.

SAT is not actively encouraging operators to develop unique South African adventure products – this in turn affects South Africa's ability to offer a differentiated product that can compete globally. It appears as if the majority of tour operators are inwardly focused and not aware of their real competitors.

It is evident that despite SAT's effort to develop a unique South African positioning, the adventure travel value chain is not aligned to deliver on promises to consumers.

7.3.2 Recommendations

If SAT is serious about adventure travel, the slogan "It's impossible" needs to be made relevant to adventure travel. The majority of the industry is confident that the current position has the potential to build a competitive industry. New Zealand has demonstrated commitment to adventure travel by extending its positioning from 100% Pure New Zealand to 100% Pure Adventure. The majority of its consumer communication reinforces the pure adventure opportunities unique to New Zealand.

SAT needs to give stronger guidelines about its target market. Australia and New Zealand target the “Experience Seeker” and the “Interactive Traveller”, respectively. They have a comprehensive demographic and psychographic profile of their target market. This is shared with the travel industry to guide them in their operations.

For a successful adventure travel industry, SAT needs to encourage the development of unique, innovative products. Adventure products need to be developed around a central South African theme so that the experience cannot be replicated anywhere else in the world, e.g. in Australia where you can bungee off the Sidney Harbour Bridge. Tourism New Zealand proudly promotes new unique “kiwi experiences like Zorbing and Fly by Wire”.

Research conducted by Sung (2000) suggests that the ideal adventure trip should involve various activities, but not too many, so that tourists still have time to relax. The CTC has a Product Innovation and Enhancement Unit, which encourages small business to develop new products by building partnerships. The objectives are to increase the range and quality of tourism products in Canada, build business networks to increase the exchange of information and to encourage cooperative ventures and partnerships. Product Clubs help small and medium-sized businesses overcome impediments to tourism growth in a given geographic area or industry sector. They offer strategies for improving the marketability of a product, practical methods for improving the competitiveness of a sector, and they normally involve businesses getting together to develop a new tourism product.

7.4 Advertising and Promotional Activities

The fourth section of the questionnaire dealt with the effectiveness and awareness of SAT’s marketing and promotional activities as perceived by the adventure travel industry.

7.4.1 Findings

A significant number of respondents were not aware of any marketing and promotional activities done by SAT. The activities that were most mentioned were the INDABA trade show and educational tours for international tour operators. It was felt that the INDABA catered for mass tourism and the cost of participating was prohibitive for small adventure companies.

In general it was felt that the South African adventure travel industry was seldom featured in specialist magazines or on adventure TV programmes.

The majority of tour operators surveyed were not aware of any marketing or promotional activity done by SAT to promote South Africa as an adventure destination.

7.4.2 Recommendations

It is acknowledged that SAT has budgetary constraints and cannot necessarily support marketing and advertising activities to the same extent as their competitors.

However, SAT needs to recognize that the Indaba is not an ideal forum for adventure travel companies. SAT arranges the INDABA as an opportunity for the travel industry to present its products to the international market. It needs to make the INDABA more accessible to smaller companies; alternatively it needs to provide other methods to help the adventure tourism industry to showcase their products. SAT should consider participating in adventure expos held in countries such as China, France and Germany. Canada, Australia and New Zealand actively participate in these expos.

SAT needs to improve its public relations efforts regarding adventure travel. Canada has launched a media site designed to improve the quality and availability of information for media outlets. The GoMedia site has a comprehensive section on outdoor and adventure travel. Self-service functionality has been engineered into the site and to date the site has been successful in obtaining unpaid media coverage on a variety of adventure activities.

Many adventure tour operators are specialists in their fields and do not necessarily have the knowledge to market and promote their adventure companies effectively. Tourism Australia assists smaller companies by running an interactive website that provides them with a range of international and domestic marketing opportunities targeting consumers, wholesalers and travel agents. The Marketing Mix Builder allows tour operators to develop a marketing plan using Tourism Australia's range of trade and consumer cooperative marketing opportunities.

7.5 Booking Facilitation

The fifth section of the questionnaire dealt with booking facilitation experienced by adventure tour operators. Their attitudes regarding a grading system were also tested.

7.5.1 Findings

By and large adventure tour operators did not have any knowledge about the adventure content of SAT's website or were not satisfied with the content regarding their specialist field. Some commented that the information was out of date.

The majority felt that SAT did not facilitate bookings in any way and others were not satisfied with the booking facilitation service SAT provided.

The establishment of a grading system was strongly supported. According to some respondents, previous attempts by THETA had failed as they went about it in the wrong way. This has resulted in the industry losing faith in the system, leaving them unsure of their position.

The SAT website does not provide adequate information about the various adventure activities in South Africa. Whilst the website has a separate dropdown menu for adventure sports, it only discusses six activities in detail. These activities are sandboarding, quadcruising, diving with great whites, scuba, bungee jumping, skiing and snowboarding. Unlike competitive websites, it does not have a comprehensive consolidated list of the various adventure companies in South Africa. It appears that

SAT has not given adequate thought to the adventure travel industry – it is concerning that skiing is listed at the expense of other unique adventure activities, since South Africa could never have a competitive advantage in snow sports.

Most adventure tour operators are not sure of SAT's role in facilitating bookings; overall they have no relationship with or allegiance to SAT.

There is a need for some form of grading system to ensure quality control in the industry and to eliminate dangerous practices that tarnish the reputation of the industry.

7.5.2 Recommendations

Considering the number of adventure travellers that are using the World Wide Web, it is critical that the content of the SAT website be improved. Both Australia and New Zealand have clear descriptions of the activities available in their country. Australia and New Zealand list 575 and 1 072 adventure companies, respectively, on their sites. Navigation on the sites is possible by company, region or type of activity.

There is a trend towards the use of innovative electronic tools to facilitate bookings for adventure travel. "Explorer Quotient" has been developed by CTC. This online self-examination tool allows each potential traveller an opportunity to discover his or her individual explorer 'type'. It allows website visitors to input their preferences, expectations and personality type while the software generates a designation of what type of explorer they are. Once the consumer's type is determined, a host of experiences is presented to encourage travel to Canada. The EQ model is unique to the industry in that it recognizes and operates on social values, not demographics. Tourism New Zealand has developed Travelplanner to assist consumers to plan their holiday. Travelplanner is themed around adventure activities by region and helps the tourist collect information, get around and plan and book the trip. Each listed adventure activity has an option where it can be added to Travelplanner.

SAT needs to consider introducing a grading scheme to give credibility to the adventure industry. The current star grading system as graded by the Tourism Grading Council of

South Africa only focuses on accommodation. The Qualmark quality assurance system in New Zealand has a star grading system for accommodation as well as an endorsement system for other tourism businesses such as adventure activities, attractions, cultural and nature experiences, coaches, rental cars and more. Each listing on the website indicates whether an adventure company has been endorsed or not. The Qualmark is a government-private sector partnership between [Tourism New Zealand](#) and [New Zealand Automobile Association](#). A grading system could enhance communications and relations between SAT and the adventure industry.

7.6 Facilitating Strategic Partnerships

The sixth section of the questionnaire dealt with knowledge of strategic partnerships.

7.6.1 Findings

Adventure tour operators interviewed in this study were not aware of any strategic partnership that SAT has with any type of company.

South African adventure companies have no relationship with SAT and are unaware of any benefits that SAT or strategic partnerships could bring them.

7.6.2 Recommendations

Strategic partnerships could be beneficial to the adventure travel industry. Canada provides an excellent best practice for managing strategic partnerships. The CTC believes that the optimum way for small businesses to grow is for them to experience firsthand the practices of similar businesses and to then transfer what they learn to their own business. They facilitate regular study tours where best practices are exchanged. Best practices and lessons learned include partnerships, Internet marketing, customer services, product development, staffing and training and environmental stewardship. The information is widely available for all operators to use.

The CTC also encourages the building of business networks to increase the exchange of information and cooperative ventures and partnerships. Product-based "clubs" enable groups to present a united front in addressing issues of concern and to come together in partnering alliances to achieve common goals.

An increasingly popular form of partnership for the CTC is that of non-traditional partnerships. Non-traditional partnerships are business partnerships outside the tourism industry, which have not invested in tourism promotion. These partnerships can provide access to significant financial participation in CTC marketing activities, particularly for international markets in which other Canadian industries want to develop and seize business opportunities.

SAT should actively seek strategic partnerships with private companies to grow adventure travel in South Africa. In addition, it should encourage the adventure industry to form partnerships with other companies to enhance their product offering.

7.7 General

The last section of the questionnaire dealt with the leadership role of SAT in creating a competitive travel industry.

7.7.1 Findings

Adventure companies do not believe that SAT is playing a leadership role in creating a competitive adventure travel industry.

Adventure tour operators function independently and feel they are not being supported by SAT in any form. They have no relationship with SAT and are unaware of SAT's vision and objectives. SAT is not taking an active leadership role in establishing a competitive adventure travel industry.

7.7.2 Recommendations

Despite the South Africa government and SAT's enthusiasm for adventure travel, the value chain is not aligned to deliver on promises to consumers.

If SAT is serious about adventure travel, it needs to firstly develop a comprehensive strategic plan to support a competitive adventure travel industry. It then needs to engage with all the stakeholders to ensure that all the activities are aligned. For SAT to gain credibility, it needs to be transparent and ensure that there is an effective communication platform between itself and adventure travel operators.

7.8 Topics for Future Research

Despite the growing importance of adventure travel as a viable industry, not much research has been attempted in this field. During the study a number of topics emanated from the primary and secondary research. A few suggestions for future research are indicated below.

- Analysis of a better understanding of the South African adventure travel market associated with traveller profiles and their travel behaviour.
- Evaluation of different communication platforms with tour operators to ensure effective communication.
- Identification of significant determinants of an effective national tourism website.
- A study to develop an e-commerce strategy for adventure travel in South Africa.
- A model that quantifies the size and potential of the various adventure activities in South Africa.
- Segmentation of the adventure travel market by demographic, socio-economic and trip-related characteristics of travellers.
- Determination of the potential for adventure activities for visitors from the African continent.

CHAPTER 8: CONCLUSION

Tourism is an extremely important contributor to the growth of the South African economy. The niche approach to tourism appears to offer greater opportunities, is more sustainable and is capable of delivering high-spending tourists. Current lifestyle and tourism trends indicate that niche tourism, in particular, adventure travel, will continue to grow. Whilst South Africa has enormous potential for adventure tourism, it is a highly competitive global industry with many countries competing for a share. If the South African government is serious about adventure tourism, it will need to develop a comprehensive strategy that will ensure a differentiated product that is supported by an aligned value chain.

Whilst the responsibilities of NTOs differ, their key role is to generically market their respective destinations and to facilitate efforts of other public and private sector stakeholders. Generally their responsibilities include market research, destination branding, advertising and promotion, booking facilitation and facilitating strategic partnerships. South Africa Tourism is responsible for marketing South Africa internationally. Its marketing strategy includes striving to realize the country's potential in terms of sport, adventure, conference and incentive tourism. The objective of this research was to determine if SAT is giving enough support for the establishment of a competitive adventure tourism industry.

Exploratory research established that SAT is not excelling in any activity that will contribute to establishing South Africa as a competitive adventure travel destination. NTOs of competitive destinations appear more active in supporting and developing their respective adventure travel industries. This research study confirmed that South African adventure service providers do not believe that SAT is providing any form of leadership at strategic or operational level. Adventure travel service providers have little understanding of the role SAT could play and currently have no relationship with SAT.

From the research it is conclusive that SAT is not giving enough support for the establishment of a competitive adventure travel industry. The results of the study have

indicated some fundamental issues that need to be addressed by SAT to ensure a competitive adventure travel industry.

Most important is the need for SAT to acknowledge the importance of the industry and to take accountability for supporting its growth. SAT needs to develop a comprehensive strategy that will involve all key stakeholders. Efficient communication methods and tools must be developed to ensure stakeholder involvement and alignment. It would be beneficial if SAT quantified the potential size of the adventure travel industry. This will not only ensure credibility, but it will also encourage suitable strategic partners to get involved.

SAT needs to develop a comprehensive knowledge management system that will allow insight into the various components of the adventure value chain. Also important is the development of a measurement system that can track its performance.

The South African brand positioning needs to be evolved so that it is made relevant to adventure travel. It is critical for SAT to clarify and define its target market. This will improve resource utilization and increase synergy. SAT needs to take a leadership role and encourage the development of highly differentiated products. It is evident that SAT's biggest promotional effort, the INDABA, does not address the needs of the adventure travel industry. SAT should develop an advertising and promotional strategy for the adventure industry. Central to this is the improvement of its website. The website is not only an advertising medium, it is a key enabler for bookings and customer relationship programmes. As safety is a big concern for consumers, SAT needs to develop and manage a grading system for adventure travel operators. This will improve confidence in the South African adventure product.

SAT must to encourage strategic partnerships within the adventure industry as well as with non-traditional partners. This will improve the quality of adventure travel products and allow for the exchange of information. One of the biggest problems of the industry is that it is highly fragmented. The forming of cooperative ventures could improve standards and operational efficiency.

It is recommended that SAT develop a strategy so that it can capitalize on the opportunity that the 2010 World Cup could have for adventure travel.

BIBLIOGRAPHY

ANC Today. 2006. The new South Africa - A season of hope.

<http://www.anc.org.za>

Accessed 12/05/2006

Applebee, A., Ritchie, B., Demoor, S. & Cressy, A. 2000. *The ACT Tourism Industry Internet Study: Attitudes, Perceptions and Adoption*. Canberra: Centre for Tourism Research, University of Canberra.

Arnould, E.J. & Price, L.L. 1993. River magic: extraordinary experience and the extended service encounter. *Journal of Consumer Research*. Vol 20, 24-25.

Boniface, P. 2000. *Dynamic Tourism: Journeying with change*. Toronto: University of Toronto PR.

Bitpipe. 1998. Best practices.

<http://www.bitpipe.com/tlist/Best-Practices.html>

Accessed on 13/11/2006

Briggs, S. 2000. *Successful Tourism Marketing: A Practical Handbook*. 2nd ed. London: Kogan Page.

Brown, F. 1998. *Tourism Reassessed. Blight or Blessing?* Oxford: Butterworth-Heinemann.

Bryman, A. 1988. *Quantity and Quality in Social Research*. London: Routledge.

Buckley, R. 2003. Adventure tourism and the clothing, fashion and entertainment industries. *Journal of Ecotourism*. 2(2):126-134.

Buhalis, D. 2000. Marketing the competitive destination of the future. *Tourism Management*. 21:97-116.

Canadian Tourism Commission.

<http://www.canadatourism.com>

Accessed 12/08/2006

Carer, C. 2000. Can I play too? Inclusion and exclusion in adventure tourism. *The North West Geographer*. 3:49-59.

Center for Strategic Relations. 2001. Glossary of strategic relations terms in Business.

<http://iunctura.com/glossary/index.shtml>

Accessed 15/11/2006

Conrad, D. & Barreto, I. 2005. Redefining tourism. *International Trade Forum*. 2:22-23.

Cooper, D.R. & Schindler, P.S. 2003. *Business Research Methods*. 8th ed. Boston: McGraw-Hill/Irwin.

Day, J., Skidmore, S. & Koller, T. 2002. Image selection in destination positioning: A new approach. *Journal of Vacation Marketing*. 8(2):177-187.

Delta Environmental Centre. Environmental facts.

<http://www.deltaenviro.org.za>

Accessed on 10/07/2006

Dieke, P.U.C. (ed). 2000. *The Political Economy of Tourism Development in Africa*. New York: Cognizant Communication Corporation.

Dore, L. & Crouch, G. 2003. Promoting destinations: An exploratory study of publicity programmes used by national tourism organizations. *Journal of Vacation Marketing*. 9(2):137-151.

Discover our Drakensberg.

<http://www.drakensberg-tourism.com>

Douglas, N., Douglas, N. & Derrett, R. 2001. *Special Interest Tourism: Context and Cases*. New York: John Wiley & Sons.

Ewert, A.W. & Hollenhorst, S.J. 1989. Testing the adventure model: Empirical support for a model of risk creation participation. *Journal of Leisure Research*. 21(2):124-139.

Ewert, A.W. & Hollenhorst, S.J. 1997. Adventure recreation and its implications for wilderness. *International Journal of Wilderness*. 3(2):21-29.

American Express. Exclusive Australia travel opportunities for U.S. card members.

http://home3.americanexpress.com/corp/pc/2004/aussie_official.asp

Accessed on 14/06/2006

Fair Trade in Tourism. 2005. South Africa's contribution to post-apartheid transformation. 23 May.

<http://www.fairtourismsa.org.za/news/messages/23052005.html>

Accessed on 13/05/2006

Finn, M., Elliott-White, M. & Walton, M. 2000. *Tourism and Leisure Research Methods: Data Collection, Analysis, and Interpretation*. Harlow: Longman.

Gilmour, C. 2006. Good growth, but not spectacular. *Financial Mail*. 5 May.

Government Communication and Information System.

<http://www.gcis.gov.za/media/pcomm/040615imc.htm#valuebrand>

Accessed on 13/05/2006

Hague, P. & Jackson, P. 1996. *Market Research: A Guide to Planning, Methodology and Evaluation*. London: Kogan Page.

Henderson, K. 1990. Reality comes through a prism: Methods and choices in leisure research. *Society and Leisure*. 13(1):169-188.

iExplore. 2005. iExplore announces 2005 top ten world travel destinations.

<http://www.iexplore.com>

Accessed 14/05/2005

International Marketing Council. 2004. Annual report - Briefing to the portfolio committee on communications. 15 June.

ITB. 2003. A new tourism scenario – key future trends.

<http://www.tourismintelligence.com>

Accessed 17/05/2005

Jeffries, D. 2001. *Governments and Tourism*. Oxford: Butterworth-Heinemann.

Kalahari Management Inc and New World Expectations. 2001. *Tourism Opportunity Analysis – Adventure/Extreme Adventure: Tourism in the Grande Cache Region*.

King, J. 2001. Destination marketing – Connecting the experience rather than promoting the place. *Journal of Vacation Marketing*. 8(2):105-109.

Kotler Marketing Group. 2001. Destination marketing in United States. Benchmarks and best practices.

<http://www.kotlermarketing.com/resources/whitepapers/KMG-.pdf>

Accessed 14/11/2006

Library of Economics and Liberty. 1999. National Competitiveness Council.

<http://www.econlib.org/>

Accessed 12/09/2006

Lipscombe, N. 1995. Appropriate Adventure: Participation for the aged. *Australian Park and Recreation*. 31 (21):41-45.

Lubbe, B.A. (ed). 2005. *Tourism Management in Southern Africa*. 2nd ed. Cape Town: Pearson Education.

Millington, K., Locke, T. & Locke, A. 2001. Occasional studies: Adventure travel. *Travel and Tourism Analyst*. 4:65-69.

Mills, R.C. & Morrison, A.M. 1998. *The Tourism System*. Dubuque, Iowa: Kendall Hunt Publishing Company.

Ministry of Tourism

Tourism plays critical role in economy. 22 June,2005.

<http://www.tourismresearch.govt.nz>

Accessed on 13/05/2006

Morgan, N.J., Pritchard, A. & Piggott, R. 2003. Destination branding and the role of stakeholders: The case of New Zealand. *Journal of Vacation Marketing*. June, 9(3):285-298.

Morgan, N.J., Pritchard, A. & Pride, R. (eds). 2004. *Destination Branding*. 2nd ed. Oxford: Elsevier Butterworth–Heinemann.

Morrison, A. & King, J. 2002. Small tourism businesses and e-commerce: Victorian tourism online. *Tourism and Hospitality Research*. 4(2):104-116.

Naisbitt, J. 1994. *Global Paradox: The Bigger The World Economy, The More Powerful its Smallest Players*. New York: W Morrow.

Novelli, M. 2004. *Niche Tourism: Contemporary Issues, Trends and Cases*. Oxford: Elsevier.

Palmer, A. & McCole, P. 2000. The role of electronic commerce in creating virtual tourism destination marketing organizations. *International Journal of Contemporary Hospitality Management*. 12(3):198-205.

Poon, A. 2003. The Berlin Report. A new tourism scenario – key future trends.

<http://www.fedhasa.co.za>

Accessed 16/05/2006

Republic of South Africa. 1996. *White Paper on the Development and Promotion of Tourism in South Africa*. Pretoria: Department of Environmental Affairs.

SAT see *South African Tourism...*

South African Government Information. 2002.

<http://www.info.gov.za>

South African Tourism. 2004. South African tourism annual report.

<http://www.southafrica.net>

Accessed 15 /08/2006

South African Tourism.

<http://www.southafrica.net>

Accessed 15 /08/2006

Standing, C. & Vasudan, T. 2000. The marketing of regional tourism via the Internet: Lessons from Australian and South African sites. *Marketing and Intelligence Planning*. 18(1):45-49.

Sung, H. 2000. An analysis of the adventure travel market from conceptual development to market segmentation. Unpublished PhD. Purdue University, USA.

Sung, H., Morrison, A.M. & O'Leary, J.T. 2000. Definition of adventure travel: Conceptual framework for empirical application from the providers' perspective. *Journal of Travel & Tourism Marketing*. Vol. 11-20.

Swarbrooke, J., Beard, C., Leckie, S. & Pomfret, G. 2003. *Adventure Tourism – The New Frontier*. Oxford: Butterworth-Heinemann.

The International Ecotourism Society

[http:// www.ecotourism.org](http://www.ecotourism.org)

Accessed 14/11/2006

The Ministry of Tourism. Glossary of tourism terms.

<http://www.tourism.govt.nz/quicklinks/ql-glossary.html>

Accessed 15/11/2006

Tourism Australia.

www.tourism.australia.com

Accessed on 2006/05/17

Tourism Industry Association of Canada. Sustainable tourism.

<http://www.tiac-aitc.ca/english/sustainabletourism.asp>

Accessed on 17/05/2006

Tourism New Zealand.

<http://www.newzealand.com>

<http://www.tourismnewzealand.com>

Accessed 18/08/2006

Tourism Queensland. 2004. Adventure tourism.

<http://www.tq.com.au>

Accessed 12 /05/2006.

United Nations Environment Programme. 2006. World Ecotourism Summit.

<http://www.uneptie.org>

Accessed 16/09/2006

Visser, G. & Rogerson, C.M. 2004. Researching the South African tourism and development nexus. *GeoJournal*. 60(3):201-212.

Vogt, A. 2005. Addressing the adventure travel research gap.

<http://www.traveldailynews.com>

Accessed 7/05/2006

Wight, P.A. 1993. Sustainable ecotourism: Balancing economic, environmental and social goals within an ethical framework. *Journal of Tourism Studies*. 4(2):54-66.

Wikipedia. Tourism.

<http://en.wikipedia.org>

Accessed 6/10/2006

World Resources Institute.

http://newsroom.wri.org/wrifeatures_print.cfm?NewsletterID=81

Accessed on 14/05/2006

World Tourism Organization. 2005. *Tourism Highlights*. Spain.

World Travel and Tourism Council. 2002. *Tourism and Biodiversity: Mapping Tourism's Global Footprint*. London.

World Travel and Tourism Council. 2004. Competitiveness monitor.

<http://www.wttc.org>

Accessed 17/09/2006

World Travel and Tourism Council. 2006. *World Travel and Tourism Climbing to New Heights*. London: Accenture.

WTO see *World Tourism Organization...*

WTTC see *World Travel and Tourism Council...*

Yesawitch, P.C. 2000. Ten trends shaping the future of leisure travel. *Hotel and Motel Management*. Vol 19:19-26.

Youell, R. 1998. *Tourism: An Introduction*. Harlow: Longman.

Zurick, D.N. 1992. Adventure travel and sustainable tourism in the peripheral economy of Nepal. *Annals of the Association of American Geographers*. Vol. 82:608.