

Improving Domestic Tourism in Namibia

An Interactive Qualifying Project Report
Submitted to the Faculty of
Worcester Polytechnic Institute
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Degree of Bachelor of Science
By

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Abstract

This report, commissioned by the Namibia Tourism Board, investigates domestic tourism in Namibia. Through analysis of archival research, observations, questionnaires, and interviews conducted with domestic tourists and service providers, findings on current travel trends, perceptions of tourism, and areas for improvement were developed. A set of recommendations was compiled for the Namibia Tourism Board to identify areas for further research and ultimately inform improvements to develop domestic tourism in Namibia to a successful and sustainable level.

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Swakopmund Hotel and Entertainment Center
Wild Dog Safaris

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Improving Domestic Tourism in Namibia

Executive Summary

Jennifer Moseley, Lindsey Sturgis, Melissa Wheeler
Sponsored by the Namibia Tourism Board and
Worcester Polytechnic Institute, Worcester, MA, USA
May 3, 2007

Introduction

According to the Tourism Satellite Account of Namibia, “The 71,800 Travel & Tourism Economy jobs in Namibia in 2006 represent 17.9% of the total workforce. By 2016, Travel & Tourism Economy employment is expected to increase by 36,000 jobs in Namibia to 20.7% of total employment” (TSA, 2006, pg. 55). The Tourism Satellite Account (TSA) suggests that there is great potential for growth within the tourism industry which will reflect positively on Namibia’s economy. Currently, Namibia’s tourism market caters primarily to international tourists while domestic tourism is ignored. With the domestic market as a virtually untapped resource in Namibia, the potential for development is considerable.

Presently, insufficient information about domestic tourism hinders the market from progressing and organizations from improving domestic tourism. Research is needed to identify Namibian travelers and assess their financial means in terms of their potential contribution to the tourism industry. From this information, proper pricing systems that can accommodate more domestic tourists can be identified. Information must be gathered to determine the desires and motivations of Namibians to travel. Finally, the industry needs to be evaluated to determine willingness to accommodate domestic tourists and successful strategies to attract Namibians.

Therefore, this project was aimed to *provide the Namibia Tourism Board with information, data, observations, and recommendations to contribute to the improvement of domestic tourism in Namibia*. This goal was accomplished through identifying current travel trends and future travel desires of domestic tourists, assessing the financial abilities of middle-class Namibians, assessing the perceptions and experiences of domestic tourists regarding the tourism industry, and identifying successful practices from selected tourist destinations through analyzing cost structures and marketing and branding techniques.

Background

To begin the project, archival research was conducted to inform the study of domestic tourism. Research topics included Namibia’s history and struggle with German colonization, the South African rule during the Apartheid era, and the resulting social and economic implications for the current tourism industry. As a result of the colonial period, Namibia is heavily influenced by German culture through language, architecture, and landmarks. The apartheid legacy has left Namibia geographically segregated by economic, racial, and social status, which is also seen throughout the tourism industry. Many companies are white or foreign owned and the majority of frequent travelers are upper-class Namibians or internationals. As a result, many Namibians feel resentment towards the tourism industry and feel they are not treated with the same respect as foreign travelers.

To remedy this problem, successful marketing and branding practices currently applied throughout the global tourism industry were also researched to determine how Namibia could be re-branded to incorporate more domestic travelers into the industry and encourage more travel. Several types of tourism, including heritage, cultural, nature-based, and adventure tourism, as well as related attractions

that could be successful in Namibia were also investigated. Potential benefits of each type of tourism as far as employment opportunities for locals were also researched. The archival research conducted informed all aspects of the project: objectives, methodology, and recommendations.

Methods

Data was collected through a questionnaire distributed to six companies and tourism students at a local university, as well as through interviews with current domestic tourists and selected tourism service providers.

One hundred and nine completed questionnaire responses were received and analyzed using both basic statistical and content analysis techniques. Data was collected to identify the Namibian traveler through different segments based on age, income, destination of travel, purpose of travel, travel group size, preferred mode of transportation, and accommodations used. Questions were also asked regarding future travel desires and reasons for not traveling.

Personal interviews were conducted with seven employees at a selected company to provide more information on tourist perceptions in greater detail than could be obtained through questionnaires. Interviews with eleven selected service providers were conducted based on their locations throughout Namibia. All interviews were analyzed using content analysis. Triangulation and correlations between all forms of data collection were performed to ensure accuracy of the results.

Survey Results

The demographics that responded to the questionnaire represent a sample of middle-class Namibians. Figures 1 and 2 below display the distributions of age and income respectively. The most common age groups reached were 26-35 and 36-45 years and the most frequent income ranges were under N\$150,000. This targeted sample, although not representative of the entire Namibian population, is representative of Namibians who can afford to travel, but may not travel frequently due to financial restrictions.

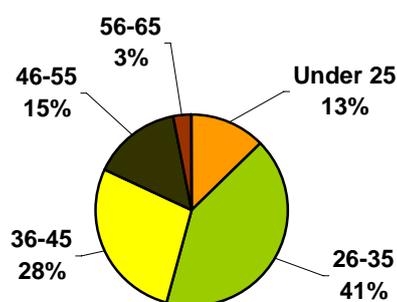


Figure 1. Age Distribution [n=94]

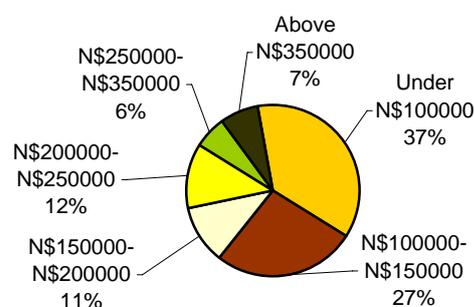


Figure 2. Income Distribution [n=98]

Finding 1: Namibians Currently Travel

From this collected data, a series of three findings emerged. The first finding was that **Namibians currently travel** domestically. Figure 3 displays that the most popular months of domestic travel which are April, May, and December. Overlaid are popular months of international travel collected from the TSA, which are July through November. Since these peak seasons do not overlap, service providers have the opportunity to accommodate domestic travelers in the off season, a recommendation that will be discussed later in the report.

Purpose of travel was split almost evenly between visiting friends and relatives (VFR) and leisure, as seen in Figure 4. Developing leisure travel will be important for Namibia because it can contribute money to the economy and create employment opportunities.

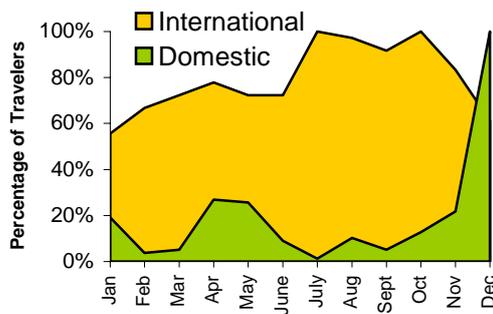


Figure 3. Months of Domestic and International Travel [n=104, n=171,000]

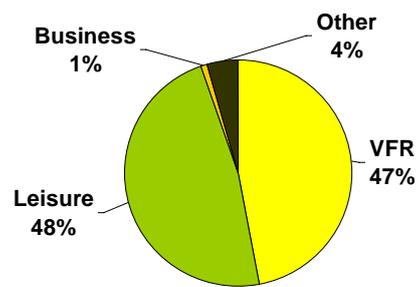


Figure 4. Purpose of Travel [n=93]

Information was gathered on types of accommodations and modes of transportation used. The most common accommodations used were “staying with friends and relatives” and camping facilities. With these being the most affordable options, income was considered in correlation with the responses and it was found that respondents with lower income ranges tend to use more affordable travel accommodations, while those with higher income levels utilize facilities such as lodges or hotels which are more expensive. Personal car was the most common and affordable mode of transportation. Very few respondents reported traveling by bus or train, since these services are often expensive and difficult to access.

The questionnaires also determined that Namibians would like to continue traveling in Namibia. The majority of respondents, 68%, would like to travel in Namibia versus outside of the country. Most would also like to partake in nature-based tourist activities as seen from Figure 5, which depicts the first choice activities desired by the questionnaire respondents.

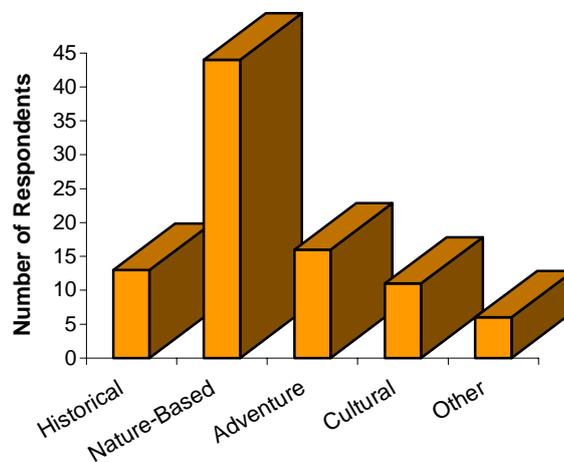


Figure 5. Desired Tourists Attractions [n=90]

Namibians who do not travel would also like to travel in the future within Namibia. Findings from the collected data show the desire of Namibians to travel to different destinations within the country, the most popular being Swakopmund. These results are displayed in Figures 6 and 7.

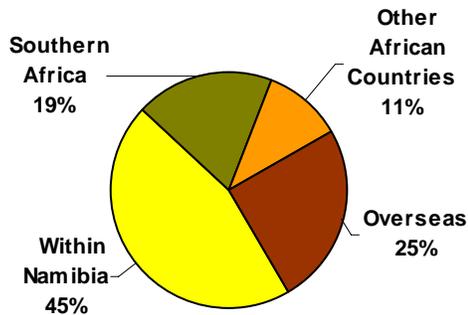


Figure 6. Desired Destinations Of Non-traveling Namibians [n=55]

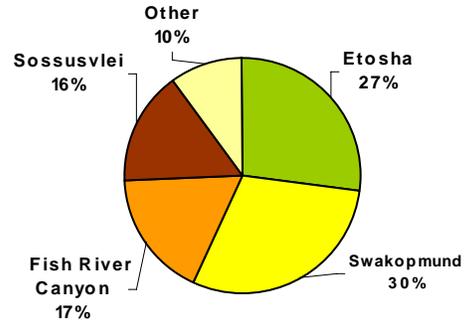


Figure 7. Desired Destinations within Namibia [n=43]

Data collected and analyzed in this finding is valuable to the Namibia Tourism Board in many applications. Identifying domestic tourists through segmentation allows for a more accurate marketing approach to reach different groups of Namibians. Understanding domestic tourists is the first approach towards improving tourism in the country.

Finding 2: Namibians Believe Travel and Tourism is Too Expensive

Many respondents commented on the high prices of tourism services and accommodations. Figures 8, 9, 10, and 11 below depict the perceptions of domestic travelers on tourism service pricing, reasons for not traveling, past expenditures, and future willingness to spend money on tourism. From the distributed questionnaire, interviews, and observations, it was found that tourism in Namibia is focused primarily on the international market. This causes prices to increase beyond the affordability of many Namibians, which deters many potential tourists from traveling. Although the domestic tourism industry is currently not a major contributor to the Namibian economy, data analysis discovered that Namibians do spend money on travel but the amount spent and the amount Namibians are willing to spend differ greatly. If the Namibia Tourism Board and service providers do not fix this problem throughout Namibia, domestic tourism will diminish.

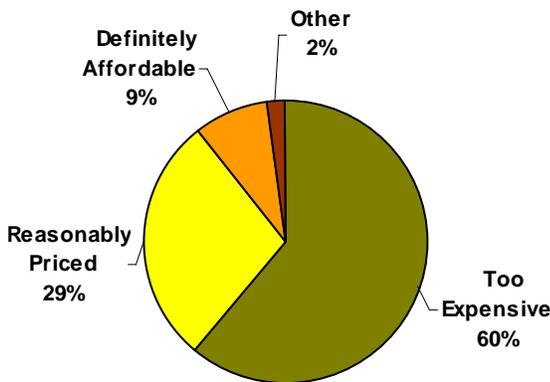


Figure 8. Perceptions of Pricing [n=104]

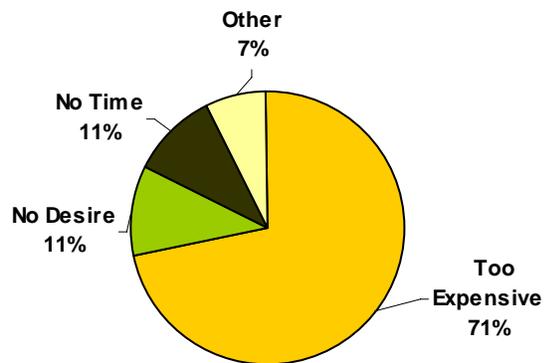


Figure 9. Reasons Namibians Do Not Travel [n=28]

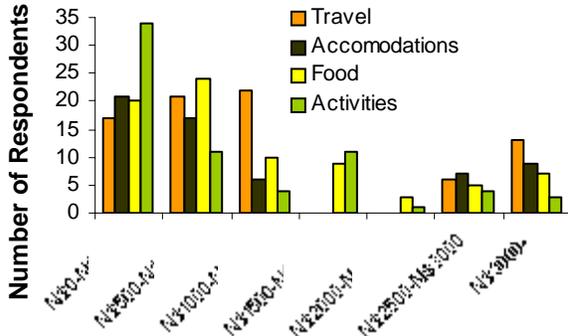


Figure 10. Past Expenditures [n=79]

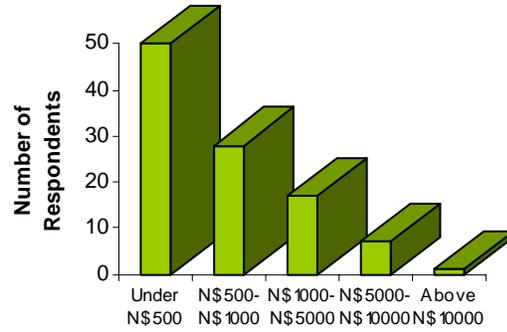


Figure 11. Willingness to Spend [n=104]

Finding 3: The Tourism Industry Does Not Cater to Namibians

Comments from responses to the questionnaires and interviews informed the third finding; **the tourism industry does not cater to Namibians**. Figure 12 below depicts common areas for improvement based on replies from the questionnaire. Although not evident in the graph, quality of service was also a major complaint among participants as seen through open-ended responses and interviews. These areas for improvement are addressed in the recommendations section of the report.

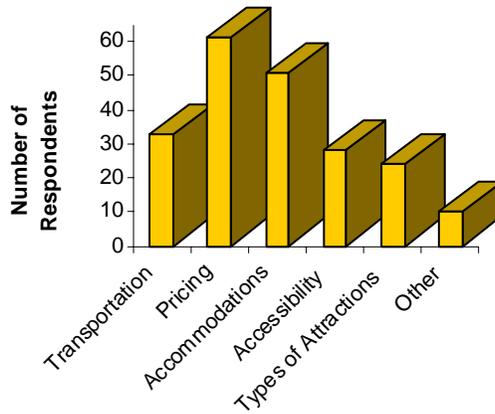


Figure 12. Areas for Improvement [n=104]

The tourism industry in Namibia focuses on the international market. This creates a disparity in pricing and quality of services. Figure 13 depicts the nationality of guests utilizing accommodations in Namibia, which was analyzed from the annual levy return forms provided by the NTB. The majority of guests are European, and only 31% of guests are Namibian. This percentage is at unsatisfactory level.

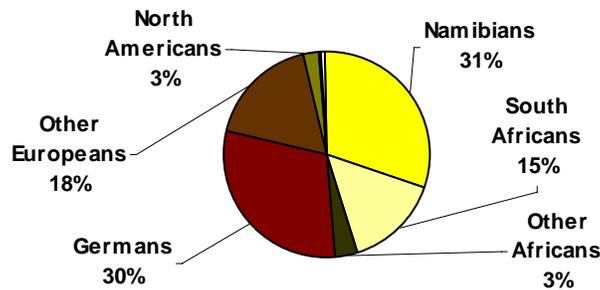


Figure 13. Nationality of Accommodation Guests [n=7,901]

As stated, Namibians would like to see improvements in the tourism industry. Pricing in the industry remains a problem throughout the country and prevents Namibians from traveling. Poor quality of service and accommodations are also common complaints among tourists. If services are not improved, domestic tourists may not travel in Namibia.

Discussion and Recommendations

Findings from the research have led to the following set of conclusions and recommendations for the Namibia Tourism Board to consider, in conjunction with conducting further research, in order to begin to develop and improve domestic tourism in Namibia:

- **Improve marketing strategies**

From observation and interviews, the majority of service providers focus marketing towards international travelers. Therefore, Namibians are unaware of the types of attractions and accommodations available to them at affordable prices. To improve this situation, it is recommended that the Namibia Tourism Board *distributes literature to service providers regarding the importance and potential benefits of domestic tourism, as well as successful domestic advertising methods to attract more locals to their establishments*. A sample brochure that specifically markets domestic tourist attractions is included in the full report. Combined with segmentation of the Namibian market, marketing and branding techniques can be applied to better target the population of potential domestic travelers.

- **Encourage service providers to accommodate domestic tourists**

The first approach is to create an understanding of the importance of domestic tourism to Namibia's tourism market. This should be done through the *distribution of literature describing the seasonality of international and domestic tourist travel, as well as disposable income data outlining suggested pricing structures that locals can afford*. If the literature does not encourage service providers to reduce pricing, thus increasing the percentage of domestic tourists engaging in leisure travel, an incentive should be introduced.

- **Improve the variety and accessibility of attractions throughout Namibia**

As previously noted, Namibians would most like to visit natural attractions. *The Namibia Tourism Board should begin to identify and market underdeveloped and underutilized nature-based attractions throughout Namibia*. Since the significant majority of questionnaire respondents expressed desire to explore Namibia's vast landscapes and changing scenery, successful marketing of such attractions would greatly encourage more domestic travel. *Again, attractions in Namibia need to be marketed to Namibians*. By reducing pricing and advertising low cost attractions throughout the country, domestic tourists will be encouraged to travel within Namibia.

- **Transportation service providers should establish a pass system**

Transportation is an important part of any tourism industry, but is a major problem throughout Namibia. As mentioned in the findings, the majority of domestic tourists travel by personal car because the bus and train systems are too expensive and often inaccessible due to scheduling issues. To help alleviate this and other problems, it is suggested that *transportation service providers establish a pass system where individuals or families can pre-pay for a pass and receive discounts over a period of months*. Creating

affordable and easily accessible modes of transportation can encourage Namibians to travel more frequently.

- **Conduct more research on domestic tourism**

This project has only just begun to determine the issues preventing the domestic tourism industry from expanding. Due to resource limitations, a small sample size was used in this study. Although the sample targeted the desired population of middle-class Namibians, the sample was not representative of the Namibian population as a whole. Several recommendations were made based on the collected data in order to improve the current domestic tourism industry; however, more research must be conducted before conclusive results can be determined. *The Namibia Tourism Board should continue conducting research on the current state of domestic tourism in Namibia; specifically, the disposable income of Namibians and the amount of money Namibians are willing to spend on accommodations, activities, and transportation.*

Summary

If the situation with domestic tourism does not change, the market may cease. Currently, service providers are forcing Namibians to spend money outside the country or not at all which brings the economy down. As discussed in the findings, Namibians do travel, would like to continue traveling, and enjoy travel in their home country but are prevented from traveling more due to several limitations such as high pricing, lack of marketing, inaccessible transportation, and poor quality of services. *Domestic tourists must be motivated to participate in Namibian tourism* which can be accomplished through several recommendations. To reduce pricing, service providers must see the benefit of the domestic tourism market. A wide scale distribution of literature and comprehensive data must be made available to service providers throughout Namibia explaining the importance of domestic tourism. Marketing practices must be implemented that focus on the local domestic tourist market in addition to the international domain. Transportation, accommodations, and activities need improvement both in quality of services and pricing. These recommendations are a means to begin changes in the domestic tourism market; however, further research and years of improvements are necessary to develop the industry to a sustainable level.

There is a great sense of national pride and love of their country among Namibians. Through making changes to domestic tourism in the upcoming years, the country can evolve and grow into a greater Namibia: a country belonging to the people.

CHAPTER 1: INTRODUCTION

1.1 Project Statement

Research has shown that domestic tourism can be beneficial to a country's economy in several ways. For example, 70% of Western Australia's tourism market is comprised of domestic tourists who contribute nearly 60% of the monetary income to the tourism industry. These domestic tourists are a major factor in the success of the Australian tourism economy (Crockett and Wood, 1999, pg. 278). Successful domestic tourist attractions around the world, such as the Cape Coast Castle in Ghana, plantations and National Parks in the United States, cultural festivals in Scotland, and townships throughout South Africa, have also provided employment opportunities and financial contributions to their respective economies (Austin, 2002, Louisiana Business, 2001, Prentice, 2003, Smith and Robinson, 2006).

Non-Namibian companies are currently dominating the tourism market in Namibia. Although apartheid was abolished in 1990, many Namibians are still suffering from economic and social repercussions and are currently seeking jobs. This unemployed generation has not received the education necessary to begin building business ownership. Unfortunately, many see the tourism industry as a market for foreign visitors, not a business opportunity for Namibians. Improving the domestic tourism industry of Namibia will expose the Namibian people to tourism both through employment opportunities and travel experiences.

Namibians must be incorporated into the country's tourism economy. As indicated by the Tourism Satellite Account, the most efficient way is to incorporate Namibians into the domestic tourism industry and encourage Namibians to start their own tourism businesses. This will not only benefit the business owners but also aid in increasing domestic tourism. If a solution is not found to successfully implement domestic tourism in Namibia, outside companies may eventually overtake the Namibian tourism economy as a whole. Though the growth of non-Namibian companies may allow the Namibian economy to flourish, the majority of profits will not go to the Namibian people. These will only further the economic disparity within the country. Without a strong domestic tourism industry, people may be forced to leave their homeland to seek other employment opportunities and the Namibian culture could be lost.

Domestic tourism could aid in stimulating the economy and has the potential to create jobs for Namibians to help alleviate the high level of unemployment, which is currently climbing towards 40%. Through the development of a domestic tourism industry in Namibia, which includes proper training and education of local people, more Namibian-based companies could emerge, allowing Namibians to become active participants within their own economy. According to the Tourism Satellite Account of Namibia, “The 71,800 Travel & Tourism Economy jobs in Namibia in 2006 represent 17.9% of the total workforce. By 2016, Travel & Tourism Economy employment is expected to increase by 36,000 jobs in Namibia to 20.7% of total employment” (TSA, 2006, pg. 55). The Tourism Satellite Account suggests that there is great potential for growth within the tourism industry. Domestic tourism is a virtually untapped resource in Namibia, and its development lends itself to many economic benefits.

1.2 Project Goal and Objectives

This project focused on two important aspects of domestic tourism, both domestic tourists and service providers working in the industry. Several issues regarding potential domestic tourists were addressed and service providers’ perceptions of domestic tourism were analyzed. Specifically, this project was aimed to *provide the Namibia Tourism Board with information, data, observation, and recommendations to contribute to the improvement of domestic tourism in Namibia.* This goal was accomplished by completing the following research objectives:

- *Identify current travel trends and future travel desires of domestic tourists.*

The Tourism Satellite Account for Namibia states, “In an uncertain world of terrorism, health scares and rising fuel prices, domestic tourism is becoming an increasingly important segment [of the tourism industry] as research shows that domestic visitors are more resilient to such shocks” (TSA, 2006, pg. 55). With a better understanding of the current behaviors of Namibian travelers, such as where and when Namibians have traveled in the past, how frequently they have traveled, why they have traveled to these locations, and where they would like to travel in the future, a more precise marketing strategy can be developed to advertise travel to a wider market of Namibians. Through questionnaires focused on determining these past trends, popular destinations, and future desires regarding travel, as well as correlations

between different age groups, the Namibia Tourism Board was provided with data that has created a better understanding of domestic tourists. In turn, they will be able to implement an appropriate course marketing strategy.

- *Assess the financial abilities of middle-class Namibians.*

The economic divide between different socio-economic classes is large, yet in recent years a middle-class has been slowly emerging. In spite of this emerging middle-class, most tourism businesses still place their focus on foreign markets. As a result, many domestic travelers cannot afford the high prices which foreign travelers are willing to spend. Business owners are reluctant to lower their costs to accommodate domestic tourists because it would result in a loss of income that could be easily gained through continuing efforts to attract the foreign market. Namibia's Tourism Satellite Account states that "in many countries, local residents benefit from significant discounts in prices for accommodation and entrance fees to attractions, especially during the off-season. This encourages domestic tourism and is particularly important in Namibia where locals are often priced out of the market" (TSA, 2006, pg 51). Determining the financial abilities of middle-class Namibians, such as annual income, the amount of money Namibians are able to contribute towards travel, and their willingness to spend money on travel, will aid the Namibia Tourism Board in suggesting a pricing plan to tourism service providers that will potentially accommodate a greater number of Namibians who wish to travel.

- *Assess the perceptions and experiences of domestic tourists regarding the tourism industry.*

Through investigating the current domestic tourist market, the perceptions and experiences of current domestic tourists were better understood. Perceptions of tourism services received and experiences with different tourism activities and accommodations have informed a set of recommendations to the Namibia Tourism Board on how to improve the current industry. Measuring qualitative data collected through interviews with Namibians who currently travel has provided valuable insight into popular domestic tourist destinations and reasons why such locations are successful. Interviews have determined specific reasons why the domestic tourism industry has not yet been utilized to its full potential. While the first two objectives aimed to identify the wants and needs of the Namibian tourist regarding travel, this third objective has helped to better understand the problems associated with tourism

and areas for improvement within the tourism industry of Namibia from the perspective of the Namibian tourist.

- *Identify successful practices of selected established domestic tourist destinations.*
 - *Cost structures and price ranges of accommodation*
 - *Branding strategies*
 - *Marketing strategies*
 - *Perceptions of domestic tourists*

One of the current problems regarding the domestic tourism industry is the lack of attractions suitable for domestic travelers and their associated costs. Through understanding the methods implemented for branding and marketing such attractions, successful practices have been identified. This could help increase the knowledge and accessibility of these sites and promote domestic travel to these areas. Cost structures and price ranges of accommodations were also addressed in order to better assist a sustainable domestic tourism industry. Service provider's perceptions of domestic tourists have helped understand their willingness to accommodate domestic tourists with reduced pricing plans and other special package deals. Collaboration between service providers and the Namibia Tourism Board to incorporate domestic tourists is essential to a successful tourism industry.

- *Synthesize observations, data, and case studies into a series of recommendations and processes that will facilitate the development of domestic tourism sites in Namibia.*

The research conducted throughout this project has allowed for suggestions to be made to the Namibia Tourism Board concerning the improvement of Namibia's domestic tourism market. Information gathered on tourist perceptions, behaviors, and desires have provided information to improve tourist options such as attractions and accommodations. Interviews with service providers have determined the willingness of businesses to cater to domestic tourists. A more complete understanding of the current domestic tourism market and its potential for growth may inform policy makers of site development and employment opportunities. Overall, the research conducted throughout this project has proven useful to the Namibia Tourism Board and aid in moving the domestic tourism market forward.

1.3 Summary

This project has culminated in a set of recommendations to the Namibian Tourism Board to improve domestic tourism. Data collected was analyzed to provide information regarding the current market, which will help predict tourism trends and inform appropriate marketing strategies after the completion of the project. A sample brochure was produced to describe common domestic tourist destinations in an effort to advertise domestic tourism in Namibia to Namibians. Through fieldwork, questionnaires, observation, and interviews, this project collected both qualitative and quantitative data to be utilized by the Namibia Tourism Board to improve domestic tourism throughout Namibia. Archival research was conducted to inform fieldwork accomplished while in Namibia. Research topics included Namibian history, successful practices for branding and marketing techniques, and different types of domestic tourism that could be utilized in Namibia.

CHAPTER 2: BACKGROUND RESEARCH

2.1 Introduction

According to Deng (2002, pg. 422), “Since 1945 tourism has grown rapidly to become one of the world’s foremost economic phenomena.” Many countries have already realized the potential positive economic impact of tourism and have taken steps towards the implementation of a variety of tourist attractions. Locally, the Namibian Tourism Satellite Account, a comprehensive collection of data regarding tourism, highlights the great potential for economic growth within the domestic tourism industry. The many benefits include a stimulated economy, increased employment opportunities, and a stronger culture. Crouch (2005, pg. 17) states that “being a tourist is part of the individual’s popular culture, and rather than occurring in a tourist ‘bubble’, the tourist is a ‘consumerparticipant’, again connected and semi-attached to other areas of human and cultural activity.” Tourism is not solely based on the sights and attractions capturing the attention of tourists, but is also a cultural connection to the regional people.

As discussed in the previous chapter, the dominance of foreign-owned companies and marketing directed towards European countries has created a void in the Namibian tourism industry such that domestic tourism is neglected. In other countries, local people are connected to tourism through employment, the economy, or proximity to a tourist location. With the growing number of non-Namibian companies sustaining the tourism industry, opportunities for local Namibians are diminishing. This project aimed to gather data on the current domestic tourism market in Namibia and analyze travel trends such as the needs and wants of domestic tourists so that Namibians can become successfully incorporated into the industry. To better understand the tourism market, the history of Namibia and how it has affected today’s tourism industry, successful techniques for branding and marketing, and various types of tourism that could be utilized for domestic tourism in Namibia have been explored. The next section discusses issues affecting the tourism industry, including German colonization, apartheid, and the resulting economic condition.

2.2 Issues Affecting Domestic Tourism

A factor often forgotten when analyzing the state of a tourism industry is the region’s history. Through understanding the country’s history, a better understanding

of the heritage and culture of the local people can be gained and issues influencing certain tourism trends can be appreciated.

German Colonization and Apartheid

Namibia was shaped by the legacies of German colonization and apartheid. Remnants of those eras still exist in Namibia's modern society and influence the state of the tourism industry.

The influence of German colonization still heavily exists in Namibia today through architecture, landmarks, language, and culture. The coastal town of Lüderitz has a history strong in both Namibian and German influence; however, the town's landmarks and culture strongly represent the German population, ignoring the importance of Namibian struggle at that location. As a result, tourism is greatly dominated by German-owned companies and foreign tourism contributions.

More recently, Namibia's industry was shaped by apartheid under South African rule. Apartheid was the segregation of people by race with political, educational, and social preferences given to the white class. In the 1960's, black Namibians were forced off their land and out of Windhoek to rural areas and townships, such as Katutura. These new areas were referred to as "Homelands." The relocated people were no longer allowed to reside in the city without a working permit. In the 1970's, these discriminatory laws were finally abolished (Friedman, 2000, pg. 3).

The economic situation in Namibia and the country's social structure still reflect the legacy of apartheid in many ways. Resulting from the apartheid era, Namibia became, and has remained, segregated geographically by economic, racial, and social status. This segregation is also seen throughout the tourism industry as most companies are white-owned and the majority of travelers are internationals or upper-class Namibians. The economy has been affected by this segregation. The class and socioeconomic structures will be discussed in detail in the following section.

The Economic Situation in Namibia

Namibia has one of the most productive economies in sub-Saharan Africa. Namibia's per capita GDP in 2005 was \$3,022 USD, which has been increasing

slowly over the past several years, and is one of the highest in southern Africa¹. Tourism is the country's 3rd largest foreign exchange earner and is one of the fastest growing industries in Namibia.

Despite its productivity, Namibia has one of the most skewed income distributions in the world. According to an article in the *Journal of Southern African Studies*, "Unequal access to productive land and to water is a central feature of Namibia's German colonial inheritance...[and] is a major factor in determining inequality of incomes and wealth" (Tapscott, 1993, pg. 36). White farmers and ranchers, as well as black elites, comprise approximately 5% of the Namibian population, while controlling approximately 71% of the GDP. The black majority still owns very little land and has access to very limited resources. The bottom 55% of this population controls only 3% of the GDP and lives in extreme poverty (Tapscott, 1993, pg. 30). This economic disparity severely limits the ability of Namibians to participate in activities such as travel and tourism and is the main factor preventing the domestic tourism industry from developing.

The unemployment rate in Namibia is another significant economic limitation. In 1993, the rate was estimated to be 25-30% (Tapscott, 1993, pg. 33), and has increased to approximately 37% over the last decade². A United Nations study states, "The rate of unemployment is generally much higher if one includes underemployment - people operating below their full capacity - total unemployment could well exceed 60 percent."² There has been a high demand for skilled workers, especially within the tourism industry, but mostly likely as a result of apartheid educational policies, the majority of the Namibian work force lacks the skills needed to perform those jobs, creating severe competition between unskilled workers. Consequently, there is little opportunity for these unskilled Namibian workers to enter the tourism work force, which limits the development of a domestic tourism industry that incorporates Namibians into their own economy. Overall, the history of Namibia has greatly affected today's society and has placed restrictions on the ability of a domestic tourism industry to flourish.

¹ Country Watch (2006), Namibia: Economic Overview, Accessed January 21, 2007, www.countrywatch.com

² <http://www.irinnews.org/report.aspx?reportid=59331>

Summary

As stated, these historical, social, economic, and racial disparities in Namibia as a result of apartheid and colonization are reflected in today's tourism industry. According to Robbins (2004), the majority of tourism companies are white-owned. There is little opportunity for black Namibians to break into the tourism industry as service providers due to their lack of education and access to affordable resources. This not only limits the economic benefits of involvement or employment within the tourism industry, but also affects the willingness of Namibians to travel within Namibia. Many Namibians have complained that they are not treated with the same respect or quality of service by these white service providers as are international travelers, leading to a mostly international tourism industry.

Additionally, the cost of travel and tourism within Namibia is often too high for middle-class Namibians to afford. Many service providers focus their marketing efforts towards international travelers who are willing and can afford to pay more for travel and tourism services, while domestic tourists who cannot provide as much profit are neglected. In order for a successful domestic tourism industry to evolve, it is necessary to analyze the current pricing structure of the tourism industry and identify where improvements can be made to accommodate local Namibians.

Regarding the future success of the tourism industry, "As many poor Blacks and party ideologues are already expressing discontent about expectations unfulfilled, it is essential for the long-term success of tourism that the communal areas be integrated into the Namibian tourism industry, ideally through ecotourism and cultural tourism, and that Black participation at a meaningful level be encouraged in all parts of Namibia," (Weaver and Elliot, 1996, pg. 216).

The apartheid legacy and the current socioeconomic status in Namibia have significant implications for today's tourism industry. Although apartheid has ended, many black Namibians still feel resentment towards international travelers (Robbins et al, 2004). Travelers of German descent, in particular, may be especially resented due to the harsh treatment imposed on Namibian tribes during colonization. As a result, Namibians may not wish to travel within their own country, particularly where there are numerous international travelers. The economic disparity and restricted access to affordable resources also limits the abilities of Namibians to participate in the tourism industry. Understanding these aspects of traveling in Namibia as well as the specific wants and needs of Namibians regarding travel are important so that the

tourism industry in Namibia may evolve to accommodate more of its own people. Since most attractions are of German influence and are designed to attract international travelers, rebranding strategies must be utilized in order to appeal to the domestic tourist market. The following section describes the use and effectiveness of these branding strategies when applied to tourism.

2.3 Branding

Branding is a strategy used to market products or services. A brand is an image or impression associated with a certain product marketed by a known source or company. Seeing a brand reminds a consumer of the attributes of the brand and the feelings evoked when engaging with that brand. One brand marketed throughout the world is Coca-Cola. It is intended that when one sees the white on red font of Coca-Cola, one is reminded of the commonly advertised refreshing taste and feel of the drink. In terms of tourism, destination branding can play a major role in attracting tourists and improving the tourism industry. Places with positive brands appeal to tourists, while those with negative brands repel them. Currently, many tourist attractions in Namibia are marketed and branded to appeal to international tourists, mostly of German descent. As a result of German colonization, these attractions do not necessarily appeal to domestic tourists. It is important to utilize branding strategies to “re-brand” destinations in order to spark the interest of local travelers.

Morgan (2004) states, “[J]ust like manufacturer’s brands, place brands evoke certain values, qualifications and emotional triggers in the consumer’s mind about the likely values of any product that comes from that place.” In the case of Namibia, four words are used to describe the entire country: “rugged, natural, soulful, and liberating.” The Namibia Tourism Board has researched “visitors from Namibia’s primary markets and Namibian stakeholders, and identified what aspects of Namibia appeal to them the most,” to determine the brand of the country (Branding Namibia, 2006, pg. 3). The Namibia Tourism Board has published a brochure for international agencies selling Namibia tourism products to instruct them on how to properly utilize branding techniques. The four keywords, “rugged, natural, soulful, and liberating”, were chosen to elicit different emotions in the consumer. “Rugged” is designed to represent a harsh environment, untouched by man. Although the terrain is challenging, the consumer can still traverse the landscape relatively easily. The key to this branding technique is to invoke the feeling of accessibility. “Natural” is a

softer description of rugged. The Namibia Tourism Board describes it as “representing something in a way that seems true to life,” (Branding Namibia, 2006, pg. 20). The landscape and wildlife are two natural aspects of Namibia that draw visitors. “Soulful” is represented by vast expanse of land. The open fields and surrounding mountain landscape create a feeling of reflection in the consumer, a way to find peace. “Liberating” concerns the feeling of escaping city life and experiencing freedom from “socially imposed constraints” (Branding Namibia, 2006, pg. 27). Tourists visiting Namibia can explore the country while relaxing and regenerating during their break from their “busy metropolitan lives”. The four words describing Namibia appeal to a variety of potential tourists and produce a specific atmosphere about the country that evokes feelings and a desire to visit (Branding Namibia, 2006).

Word choice is not the only aspect of branding. Colors and pictures define visual emotions when connected to verbal images. Namibian colors fall in the range of natural tones: sand yellows, sunset oranges, olive greens, and dark reds. In keeping with the color scheme, the brand of Namibia is “earthy and natural” (Branding Namibia, 2006, pg. 29). Pictures are used to enhance emotions. Sand-scapes and ocean views create a scene for Namibia’s beauty.

Word choice, colors, and pictures create a specifically Namibian atmosphere in the mind of the consumer. By creating a comprehensive brochure outlining these techniques, the Namibia Tourism Board can ensure the reproduction of these methods and the same brand will be distributed world-wide.

Within a country, individual locations and attractions are branded. Namibia’s examples range from the brand of abundant wildlife in Etosha National Park, to the stark beauty of Dead Vlei’s dried forest and dunes, to the rich colonial history, to the many different tribal cultures that Namibia has to offer. Namibia has been left with many potential natural, cultural, and historical attractions. Through re-branding these types of sites, particularly heritage sites with negative connotations to local Namibians of non-German descent, new tourist destinations can evolve that will attract domestic travelers. The Old Location is one heritage site in Namibia, reminding people of their history while also encouraging reconciliation and education. Improving the brands associated with other types of tourist attractions can also further increase the domestic tourism industry.

The need for rebranding and marketing attractions throughout Namibia is encouraged by the lack of domestic tourism. Several case studies were explored to

determine how heritage, cultural, and nature-based attractions have been re-branded and marketed to become successful domestic tourism sites in other areas of the world. These successful practices, as well as those at thriving attractions in Namibia, can be analyzed and used to create recommendations for improving the overall domestic tourism industry. The branding strategies of heritage, cultural, and nature-based tourism case studies are discussed in the following sections.

Heritage Tourism Branding

Heritage tourism is a rapidly growing sector of the tourism industry. Heritage tourism is focused on a region's history and refers to the development and visitation of sites of historical significance. Whether the sites represent atrocities or celebration, heritage sites represent history through methods including living museums, tours, and interactive exhibits. The use of heritage attractions could have a positive impact on the tourism industry and economy in Namibia because of the country's rich colonial history and apartheid legacy. However, due to their sensitive nature, there are several challenges that arise when trying to market, manage, and re-brand such attractions to Namibians and incorporate them into domestic tourism. Several case studies have been done that have touched upon these issues and give insight into the prospective market for heritage tourism in Namibia.

District Six and Robben Island

The District Six and Robben Island Museums exhibit apartheid history in South Africa. The District Six Museum is located in a section of Cape Town that was demolished after the dislocation of approximately 60,000 people (Hamilton, 2003). The focus of the museum is to remember and appreciate the past. Former residents may take part in interactive exhibits where they can document their experiences through voice recording and written displays. These personal experiences allow the community to participate in the understanding and preservation of history (Layne, 2006). The museum attracts tourist groups that are primarily former District Six inhabitants, school groups, and local South Africans. The museum also employs former District Six residents as museum guides and employees.

Robben Island is an exhibit of apartheid history, housing the prison where many political prisoners such as Nelson Mandela and Govan Mbeki were held. The museum attracts both domestic and foreign tourists who are looking to learn about

apartheid. Similar to the District Six Museum, the island employs former prisoners as tour guides (Fitzpatrick and others, 2004). Both Robben Island and the District Six Museum serve as reminders of the apartheid era, while being educational and allowing visitors to have a positive experience while learning about a dark period in South African history.

The Holocaust Museum in Washington D.C. and Concentration Camps

The Holocaust Museum is located in Washington, D.C. Attracting 2 million visitors per year, the museum is a tribute to the victims of the holocaust, where an estimated six million Jewish people and other “undesirables” were murdered by the Nazi regime.³ Visitors can view artifacts and videos from this period and upon entrance are personally connected to a victim through an ID card that they keep throughout their visit. Visitors are also given an opportunity to reflect on their visit and experiences in the “Hall of Remembrance” (Lennon and Foley, 1999, pg. 48).

“This institution succeeds because it combines memorial with museum and has been commissioned by an act of government” (Lennon and Foley, 1999, pg. 50). The number of visitors per year and the fact that more than 60% of visitors intend to return are indicative of the success of this attraction (Lennon and Foley, 1999, pg. 49). It serves as an educational site because of its content, as well as a memorial site for guests to express their remembrance.

German concentration camps are another Holocaust era tourist attraction. They are considered the most difficult attractions to manage and market because they were used for holding prisoners, forced labor, and extermination of people based on a variety of “undesirable” traits. Some camps were the site of over a million deaths (Beech, 2000, pgs. 30-31).

Today, most concentration camps are used as memorials for visitors to pay their respects, with some buildings maintained as tourist attractions. Buchenwald, for example, has several Nazi buildings open for tourists, as well as the “Buchenwald National Memorial” which was opened next to the concentration camp in 1958. Here tourists can view depictions of life in the camp and can lay wreaths in remembrance of the event (Beech, 2000, pg. 33).

According to Beech (2000, pg. 37), visitors to concentration camps can be divided into several groups: visitors with a personal connection to a camp, to the

³ United States Holocaust Memorial Museum, USHMM.org, Accessed February 4, 2007

holocaust, or to Jewish heritage, and general visitors. Beech explains that, as a result, there is a two-part nature to touring sites such as Buchenwald: history and remembrance. Both aspects are important to the visitor experience and would be important to consider in marketing similar attractions in Namibia to Namibians who were oppressed during colonization and apartheid.

Magnolia Mound Plantation

Throughout the Southern United States, Ante Bellum plantations have been turned into historical sites and living museums dedicated to education about Southern History and slavery. Many visitors to the plantations are domestic tourists and school children seeking knowledge about their history and to experience first-hand the lifestyles of both the wealthy Southern United States plantation owners and their slaves.

For example, in Louisiana the Ante Bellum plantations are divided into two main sectors: historic bed and breakfasts and living museums. The historic bed and breakfasts allow guests to experience the life of luxury of a wealthy plantation owner at the expense of their slaves, while the living museums provide a balanced view of life of both slaves and owners in the Old South. In addition, the plantations employ locals to pose as historical characters and tour guides (Louisiana Business, 2001).

The Magnolia Mound Plantation in Baton Rouge, Louisiana is one of the few surviving architectures of the early settlers. The Plantation provides a unique experience of Ante Bellum culture through educational programs, workshops, lectures, and festivals. Guests at the Magnolia Mound Plantation are encouraged to explore sixteen of the original nine hundred acres and to immerse themselves in the Ante Bellum period. They are also provided an opportunity to experience the disparities between the rich lives of the plantation owner's and the poor conditions to which the slaves were subjected through participating in plantation tours (Louisiana Business, 2001).

Opportunities in Heritage Tourism for Namibia

There are several opportunities for implementing heritage tourism in Namibia. A study conducted on foreign and domestic tourists visiting the Anne Frank house in Amsterdam determined that 35-45% of visitors felt the site was a part of their personal heritage or identity and they visited to "feel connected to their ancestors and

ancestral roots,” (Biran, 2005, pg. 2). Other motivations for visiting included the historical background of the site, the feeling that it was important to visit, a desire to learn about Jewish history and WWII, and a desire to feel emotionally involved. By analyzing the responses, it was found that there was a correlation between people who reported that the site was a part of their heritage and their motivation to visit the site (Biran, 2005, pg. 6, Austin, 2002, pg. 451).

These observations and ideas can be applied to domestic tourists in Namibia who represent a large market of tourists and who may be interested in visiting sites within their own country to learn about its history and the heritage of their people. In addition, the development and operation of such sites could create job opportunities for local Namibians who may have more knowledge about the history than tourists hired outside of the country. Examples of such sites include the Old Location, Shark Island Concentration camp, and Heroes Acre. Currently, these sites are visited by international tourists and a small number of domestic tourists, but the full potential for the use of these sites as domestic tourist attractions has not been fully utilized. As discussed earlier, branding techniques may be used to attract more tourists to these locations. Similar to heritage tourism, cultural tourism is often utilized to preserve culture and educate people about a region.

Cultural Tourism Branding

Cultural tourism can be classified as a display of current and past histories of people living in the area. It can take the form of festivals, cultural performances, township and village tourism, and touring abandoned cities. Many local people actively participate in cultural tourism to preserve and celebrate their histories. Without cultural tourism, education about local traditions and lifestyles may be lost.

Festivals

Festivals are an emerging tourism “phenomenon” (Prentice, 2003). They bring the historical aspect of a town to life and engage visitors to become active participants in its culture. Although festivals highlight certain cultural aspects of the town, the overall heritage and local culture are unchanged (Prentice, 2003).

A case study conducted on festivals in Edinburgh, Scotland was designed to analyze the growing trend. Specifically, festivals in Edinburgh appeal to art critics and day-trippers alike, and attract tourists interested in performing arts, gallery art,

and cultural heritage. City museums display local art and streets are closed to allow for street vendors and cultural performers. Edinburgh festivals occur from April to December, creating job opportunities throughout the year. "In 1996, the International Festival was estimated to support...806 jobs" (Prentice, 2003, pg 9).

Township Tourism

Visiting a township can be a very interesting type of tourism for both international and domestic travelers. Township tourism has the potential to provide visitors with an educational experience while allowing them to "relax" and enjoy a leisurely journey as they explore life in a township.

Two examples of successful township tourism are those found in Kenya and Tanzania where the Maasai people live. Visitors are greeted by dancing tribe members and have the opportunity to talk with villagers, tour the village, and experience demonstrations of the Maasai lifestyle. In Tanzania, these township tours are packaged to include meals, village tours, sight seeing, visits to craftsmen, and opportunities to purchase souvenirs (Smith and Robinson, 2006, pgs. 106-107).

To international travelers, these locations are marketed as esoteric and mysterious. The townships also appeal to backpackers, organized travelers, expatriates, and local tourists. Tourism of these townships is especially popular in Kenya and Tanzania because of their close proximity to other attractions such as Amboseli National Park, Maasai Mara, Kilimanjaro, and related safari tours (Smith and Robinson, 2006, pg. 105).

Another township that is viewed as a successful tourist attraction is the Soweto Township in South Africa. Soweto was a place of black exploitation and segregation. It is rich in political history. Soweto has been described as an eye-opener for both international tourists and South Africans visiting for the first time (Smith and Robinson, 2006, pg. 124). Interestingly, tourism was confined by law to the white sections of South Africa before the 1994 elections.

Soweto provides visitors with an "authentic and nonperformative experience, depicting 'real' history, 'real' people and the 'real' South Africa. Tourists are motivated by interest in the ethnic diversity and rich cultural heritage, which manifests itself in the daily lives and practices of township residents," (Smith and Robinson, 2006, pg. 125). Tourists can visit attractions within the township such as the squatter's settlements, housing projects, old beer-maker's houses, and Shebeens

which were illegal drinking houses during apartheid. Tourists can also visit healers and experience African dancing and cuisine. Near the township, there are also opportunities to experience resistance heritage, such as visiting Nelson Mandela's house and Freedom Square. The opportunity to visit these nearby historical attractions makes touring the township more appealing to many travelers (Smith and Robinson, 2006, pg. 126).

A survey conducted in Soweto regarding the positive impacts of township tourism suggested that tourist interest in the Soweto township culture has strengthened the pride and traditional activities of the Soweto people. This has also helped to renew the Soweto township culture, conserve cultural identity, and promote a greater mutual understanding and respect between cultures. Also, tourism of the township has provided worthwhile employment opportunities for locals and is expected to further improve the economy.

Issues that may pose a potential problem for implementing tourism of similar townships in Namibia include limited ownership, skills, and resources. To address similar issues in South Africa, a *Black Economic Empowerment* program has been implemented that encourages locals to attend workshops and offers training in tourism awareness in order to gain the skills needed to benefit from participation in the tourism industry (Smith and Robinson, 2006, pg. 139). This idea could be applied to improving culture tourism in Namibia, which has sites including the informal settlements, tribal lands, and abandoned diamond mines that have potential for becoming economically prosperous sites of cultural tourism.

Ghost Towns

Ghost towns have become a popular attraction across the United States. Across western North America, gold mines and towns were quickly built and then abandoned after the gold rush came to an end. The gold mine ghost towns attract adventurous tourists who desire to explore something out of the ordinary. Hamilton (2006, pg. 36) writes of Animas Forks, a ghost town in the Colorado's mountains that was once a mining town, that it has "fascinating open-air museums, as well as thought-provoking monuments to the challenges of early Western life." Ghost town tourists are able to rent jeeps to explore areas on their own, an appealing adventure opportunity to many visitors. Local residents acting as tour guides are able to discuss the history of the area with the tourists. Tours are advertised to those who have an

interest in nature, culture, and history. With regards to Namibia, several ghost towns exist near the town of Lüderitz that could be further utilized as tourist destinations. Hamilton (2006, pg. 38) writes, “A visit to a ghost town can serve as a poignant reminder that nature is not always so easily tamed.” Similar to some cultural attractions such as ghost towns, nature-based attractions are another type of tourism. Namibia has many opportunities for this type of tourism due to its various natural resources.

Nature-Based Tourism Branding

“The term nature-based tourism is generally applied to tourism activities depending on the use of natural resources which remain in a relatively undeveloped state, including scenery, topography, waterways, vegetation, wildlife, and cultural heritage” (Deng, 2002). “Ecotourism, or nature-based tourism that is managed to be learning-orientated as environmentally and socioculturally sustainable, has emerged in the past 20 years as one of the most important sectors within the global tourism industry,” (Buckley, 2004, pg 45). Nature-based tourism attracts a large variety of tourist types: mass tourists, individual mass tourists, explorers, and drifters (Fennel, 1999). Each type has been characterized by varying levels of adventurousness and desire for an authentic travel experience. Namibia may have a huge potential market for nature-based tourism. Several case studies will be developed in support of this idea.

Wildlife

“Wildlife tourism is tourism undertaken to view and/or encounter wildlife. It can take place in a range of settings, from captive, semi-captive, to in the wild, and it encompasses a variety of interactions from passive observation to feeding and/or touching the species viewed,” (Newsome, 2005, pg. 19). According to the Ecotourism Society, 20-40% of internationals traveling in 1998 were wildlife-tourists. Wildlife tourism is especially popular in places such as Africa and Asia, which host many national wildlife parks and opportunities to view animals in their natural habitats. In the United States, wildlife tourism is the “number one” outdoor recreational activity (Newsome, 2005).

“Wildlife tourists seek an experience that will enable them to explore, no matter for how short a time, a new ecosystem and its inhabitants. Some tourists are

lifelong wildlife enthusiasts and others merely take day trips to a wilderness area from a luxury hotel base. Many such visitors seek to be informed and educated although others wish primarily to be entertained,” (Newsome, 2005, pg. 21). Research has shown that most wildlife tourists prefer to see mammals. This explains the popularity of zoos, as well as national parks, such as in Africa where large herds of mammals can be seen. Other examples of popular wildlife attractions include butterfly reserves and glow-worm farms in England and Australia, facilities for underwater viewing and feeding of sharks in South Africa, bird watching expeditions in the USA, Costa Rica, Australia, and India, locations for viewing endangered species such as on Kapatī Island in New Zealand, Rottneſt Island in Australia, and safari trips in Kenya and Tanzania (Newsome, 2005).

Most marketing for wildlife tourism is done through visual media such as television or promotional videos. These advertisements spark tourists’ interest in seeing the animals up close. Many potential tourists are those who live in the city and do not experience wildlife in their everyday lives. Wildlife tourism is clearly applicable to Namibia, which has an abundant wildlife culture, and where most potential domestic tourists reside in the city of Windhoek. There are several game parks and the Namibia Wildlife Resorts already operating in Namibia. According to the Namibia Tourism Board, these sites are under-marketed and often too expensive for local Namibians to participate in. The full potential for wildlife sites has not been taken advantage of at the current time.

National Parks

National Parks serve as both tourist destinations and as a means to preserve nature. The Minnamurra Rainforest Centre in Australia was the subject of a tourism study focusing on tourist participation (*Interpretation in National Parks: Some Critical Questions*, Staiff et al, 2002). Specifically, studies were conducted to determine the type of tourist attracted to the park as well as their perceptions of the park. Survey data revealed that tourists ranged from avid nature-based tourists to local tourists and school groups. From the survey data, it was determined that many tourists spoke English as a second language and were upset by lack of multilingual signage. These groups were also disappointed with the focus of the signage relating solely on nature, not including the cultural and tribal history of park land (Staiff et al, 2002). As a result, park managers decided to implement a new program to better

accommodate all visitors. Pictures were taken and added to existing plaques to supplement the English descriptions, and audio tours were created to include a range of topics (Staiff et al, 2002). Tours ranging from intensive descriptions of local fauna and flora, to cultural and tribal history of the land, and even a children's guide were developed based on the differing languages of local tourist groups, their relative percentage of park attendance, and their differing knowledge of history. With this variety of programs, the park has been able to attract more visitors and accommodate domestic tourists (Staiff et al, 2002).

Natural Phenomena

Like Namibia, Western Australia is a location full of natural attractions. Since approximately 91% of visitors to Western Australia's attractions are domestic tourists, Namibia could benefit from examining the successful techniques used to attract these visitors. The Western Australia Tourism Commission launched a campaign called Brand WA in 1996 whose goal was to market Western Australia in such a way that it would provoke mental images and perceptions. To start, research was conducted to discover motivations for visiting Western Australia. The results show that tourists visited Western Australia "to relax and recharge; [view] a fresh, clean environment; and unspoilt natural scenery," (Crockett and Wood, 1999, pg. 280).

Most marketing for Western Australia is advertised through travel agents, government agencies, and celebrity endorsements. The WATC also uses advertisements such as car window stickers, license plates, and clothing to promote visitation to the location since most of the visitors are domestic tourists (Crockett and Wood, 1999, pg. 286).

One natural Australian attraction that attracts a large number of tourists is the Great Barrier Reef located near Magnetic Island, referred to as a "nature-lover's paradise." Around 53% of the land has been designated as a national park where visitors can observe wildlife and Australian plants and enjoy the natural scenery. Guests can also participate in activities around the island such as fish-feeding, snorkeling, scuba diving, sailing, and diving. "These assets are complemented by its easy accessibility, good shopping facilities and range of restaurants, coupled with an abundance of recreational activities such as water sports, golf, horse riding, parasailing, fishing, windsurfing, bush walking, bus trips, and Great Barrier Reef tours," (Abubakar, 2001, pg. 369). Research has shown that visitors are often

interested in learning more about the reef and having an educational experience in addition to a recreational one. The Great Barrier Reef National Park employs tour guides who can provide information to visitors. Approximately 1.7 million visitors, 60% of which are domestic tourists, visit the Great Barrier Reef annually (Abubakar, 2001, pg. 367).

Another example of a natural tourist attraction is the Dinosaur National Monument located along the border of Utah and Colorado, which demonstrates the use of natural history to educate the present. Visitors to the Dinosaur National Monument can experience the area in two different ways. First, they can view hundreds of fossils on a steep cliff face that is enclosed in a large building. The cliff is the location of “the most abundant prehistoric fossil site in the world,” (Ludmer, 2000 pg. 27). The building is also filled with an educational museum about the life of dinosaurs. This experience is advertised to families with children and to general natural history enthusiasts. There is no fee to enjoy the site but donations are accepted (Gildart, 2004).

The Dinosaur National Monument is marketed across the United States in literature and travel guides. It encourages tourists to experience the prehistoric era in a unique way by allowing them to travel down the river and see fossils in their original location. The success of Dinosaur National Monument demonstrates that the development of nature-based tourism sites would be beneficial to Namibia’s tourism industry.

Potential Benefits of Nature-Based Tourism

In the United States’ Tenth District, which includes states such as Colorado, Wyoming, Kansas, Nebraska, Oklahoma, New Mexico, and their respective natural parks and attractions, domestic travelers contribute 96% to the total travel economy of the area (Wilkerson, 2003, pg. 53). The popularity of nature-based attractions in other areas of the world supports the idea that natural parks and other nature-based tourist attractions have potential to become successful domestic tourist sites in Namibia. Due to the abundance of availability of nature-based attractions, the development of such sites in Namibia could create job opportunities since the attractions often “incorporate aspects such as local community, roads and tracks, visitor facilities, and attractions,” thus including the local region in the economic boost experienced due to development of these sites (Deng, 2002, pg. 432). Proper marketing and branding

techniques would be useful to improve domestic tourist interest in such sites in Namibia.

Summary

Since the Namibian tourism industry is still developing and is lacking in areas where other countries have succeeded, it is important to understand the successful practices in terms of branding, marketing, and pricing strategies. As previously stated, identifying the successful practices in branding of heritage, cultural, and nature-based attractions around the world can aid in applying these ideas towards improving the tourism industry in Namibia. Several sites in Namibia have already become thriving attractions for domestic tourism, but many have yet to be properly branded and utilized. In a later section, findings will be discussed which aim to explore how these Namibian attractions have become successful in attracting domestic tourists to their locations. Combining these ideas with those from sites around the world can enable the application of these successful practices to new and already developing sites throughout Namibia. The next section discusses current plans for these new and developing sites.

2.4 Domestic Tourism in Windhoek

Although little research has been done on the potential domestic tourism industry across Namibia, the City of Windhoek has several plans to integrate this sector into the Namibian tourism economy as a whole. Since many domestic tourists complain that there are few attractions in the Windhoek area, several exhibits have successfully been planned and executed within the city that draw a large number of domestic and international tourists alike. Plans for building new heritage attractions and re-branding old sites have also been developed.

Due to socioeconomic limitations, several problems have been encountered when trying to implement these new sites. Campaigns have been introduced to help alleviate these problems and further encourage domestic tourism. These plans and issues will be discussed in the following sections.

City of Windhoek's Current and Future Plans for Domestic Tourism

In a personal interview with employees from the City of Windhoek's Tourism sector, the topic of festivals as a successful way to draw domestic tourists was discussed. For the past four years in Windhoek, the *Ae//Gams* Festival has been held

in September, during the week when the highest volumes of tourists are present in Namibia. The festival has been very well attended by both foreign and domestic tourists, many of whom plan their travel to or within Namibia in accordance with this festival. The celebration commences with a parade on Independence Avenue and incorporates cultural performances such as poetry, drama, theatre, and dancing. The City promotes both local and foreign performers to establish connections with countries such as Germany and Finland. Around New Year's Eve, another city-wide celebration is held, attracting approximately 6,000 people. These festivals are important to the celebration and preservation of Namibian culture as well as contributing to the domestic tourism market.

The City of Windhoek works closely with the country of Finland on its plans for domestic tourism. Currently, Finland sponsors a temporary exhibit on the Old Location, the area in which many black Namibians resided before being forced into the Katutura Township. A strategy has been drafted and designs are being considered for the building of an Old Location Historical House which will depict life and history in the Old Location. The museum will be an included stop on city tours. Visitors will be able to partake in cultural performances and activities, and enjoy refreshments at the small coffee shop. The plans for this museum are being modeled after the District Six Museum and other museums in South Africa, as well as museums in Finland. It is projected that former Old Location residents will be employed as tour guides. Re-branding this site as a tourist attraction will help promote reconciliation and healing for survivors of the incident as well as a reminder and educational tool for future generations.

In addition to the heritage museum, one walking trail has been completed in Windhoek and another is being implemented in Katutura. Currently, transportation to the trails has not been thoroughly considered, but is in the process of being developed. For example, a hop-on-hop-off bus is being considered so that visitors are not restricted to a tight touring schedule and can spend as much time as desired at different locations along the route, such as the Old Location Museum. The City of Windhoek has discussed a pricing strategy for the bus, stating that the transportation will be free if run by the city, but tourists will incur a small cost if the bus is tendered to an outside vendor. It is expected that these attractions will be very popular among both domestic and foreign tourists (personal communication, City of Windhoek Tourism Sector, March 14, 2007).

Problems and Solutions for Developing Domestic Tourism

Despite the City of Windhoek's current plans to increase domestic tourism around Namibia, the problem of lack of awareness exists among local Namibians regarding the importance and purpose of tourism. In an attempt to remedy this problem, the City of Windhoek has established several awareness campaigns that have been successfully implemented in and around Windhoek.

One campaign, *Teens in Tourism*, aims to educate students about the importance of tourism. The campaign targets grade 12 students. They participate in a three-day program during which they stay at a hotel, attend tours, and engage in educational programs where they are informed of proper etiquette for dealing with international tourists as well as the benefits of a healthy tourism industry. These benefits include employment opportunities such as becoming a tour guide, as well as larger benefits such as an improved economy for Namibia. The city hopes that these students will share their knowledge with their parents and their peers to help create a more positive attitude towards tourism. At the end of the program, students are given a questionnaire to determine attitudes and perceptions on the program, which can aid in verifying the success of the program overall (personal communication, City of Windhoek Tourism Sector, March 14, 2007).

The *Black Economic Empowerment* program is another method that the City of Windhoek has utilized to increase tourism, both domestically and internationally. As part of this campaign, service providers such as restaurant owners, caterers, and hotel owners and managers, receive free training on safety, hygiene, quality standards, customer service, financing, budgeting, and marketing. The City hopes that this campaign will enable more establishments to be recognized within the tourism industry (personal communication, City of Windhoek Tourism Sector, March 14, 2007).

Tour guides have the opportunity to receive free training after which they are accredited by the City of Windhoek. These tour guides receive respect and recognition and are given referrals and other forms of assistance in finding employment within the tourism market. Currently, the *BEE* is on its fourth round of tour guide training. The goal of these programs is to allow more Namibians to participate in the tourism industry (personal communication, City of Windhoek Tourism Sector, March 14, 2007).

Although the City of Windhoek's efforts to increase domestic tourism are commendable, the domestic tourism industry needs to expand throughout the entire country. Focusing solely on the city severely limits the potential effects of these new plans. Applying ideas to other locations in Namibia can increase domestic tourism uniformly.

Summary

While developing more sites to appeal to domestic tourists is the primary step towards increasing tourism, sites cannot be fully successful without proper marketing techniques. Service providers must inform and encourage visitors to travel to and utilize their services through successful practices in marketing. The fourth objective, which was discussed in detail in the introductory chapter, aims to analyze successful practices used by service providers. These ideas will inform recommendations on how to further improve the industry. Background on common marketing techniques will be discussed in the next section.

2.5 Marketing and Market Segmentation

Tourism is a difficult product to market. Consumers are hesitant to spend large amounts of money on the "high-involvement, high-risk" purchase of travel and tourism which can be easily affected by world events such as terrorism or unpredictable weather (Fyall and Garrod, 2005, pg. 41, Seaton and Bennett, 1996, pg.25). Tourism service providers have been slow to consider and adapt their methodology to accommodate customer needs and wants, thus increasing customer satisfaction. Since the success of the tourism industry is highly susceptible to influence based on the positive or negative perceptions of the customers, being able to measure and identify these perceptions will help determine the state of the current tourism market and highlight areas for improvement. The tourism industry's susceptibility to change requires product branding and marketing to create a positive image to encourage consumers to utilize tourism services (Fyall and Garrod, 2005, pgs. 41-42, Seaton and Bennett, 1996, pg. 25).

"Tourism marketing is the managerial process of anticipating and satisfying existing and potential visitor wants more effectively than competitive suppliers or destinations. The management of exchange is driven by profit, community gain, or both; either way long-term success depends on a satisfactory interaction between

consumer and supplier. It also means securing environmental and societal needs as well as core consumer satisfaction,” (Fyall and Garrod, 2005, pg. 43).

Two specific strategies for marketing are the push and pull approaches. The push approach is “trade-oriented” where companies use outside sources or “intermediaries” to promote and market their products (Fyall and Garrod, 2005, pg. 95). The pull approach is “consumer-oriented” and aims to “pull” consumers in through marketing. The pull approach consists of two types. The undifferentiated pull approach uses marketing that is focused on the target population as a whole, while the differentiated pull approach categorizes the target population into smaller groups in order to focus on each group’s specific needs and wants (Fyall and Garrod, 2005, pg. 92). The differentiated pull approach is a strategy also known as market segmentation.

Benefits of Market Segmentation

Market segmentation is defined as a “subdivision of the total market into discrete and identifiable segments in accordance with a number of clearly defined characteristics,” (Fyall and Garrod, 2005, pg. 100). Through identifying the appropriate characteristics of each segment, companies may be able to increase their profits by satisfying the needs and wants of a greater number of consumers. By evaluating how different groups respond to different marketing techniques, new opportunities can also be formed.

Markets can be segmented by many different categories. In the most basic terms, markets can be segmented by trip and tourist descriptors (Seaton and Bennett, 1996, pg. 31). Trip descriptors divide the market into smaller groups based on the type of trip the consumers would like to take. Several examples of trip descriptors include trips to visit friends and relatives (VFR), holiday and recreational trips, and business trips. Tourist descriptors describe specific characteristics of the tourist. These include social (i.e. cultural background, social class, family groups), geographic, psychological (i.e. motivation, perception, beliefs and values), personal (i.e. age, occupation, lifestyle, personality, income), behavioral (i.e. number of trips, purchases and expenditures, past travel), and time (i.e. seasonality, weekends vs. weekdays) characteristics (Fyall and Garrod, 2005, pg. 101, Seaton and Bennett, 1996, pgs. 34-48). These characteristics can be determined through direct observation, staff perceptions of customers, past databases of customers, and surveys. (Seaton and Bennett, 1996, pg. 49). Since tourists are interested in different types of trips and

activities, utilizing segmentation strategies for marketing can allow consumers to be reached more effectively. Focusing a marketing strategy specifically toward tourists desiring to take a specific type of trip can allow for an increased level of appeal and a stronger industry.

According to the 2006 Domestic Tourism Growth Strategy Final Report for South Africa (pg. 35), “[P]eople with similar characteristics can be more effectively targeted with messages and products relevant to their needs which results in ‘more bang for your buck.’” In this study, a total of seven segments were formed: “young and upcoming, independent young couples and families, striving families, well off homely couples, home based low income couples, basic needs older families, and golden active couples” (DT Growth Strategy, 2006, pg. 38). A four step process of defining, sorting, describing, and collapsing the segments was utilized to divide the total market into these segments by age, race, household income, and purpose of travel. The size and potential value of the each segment was determined from census data (DT Growth Strategy, 2006, pg. 36).

Over two six-month periods, approximately 12,600 people underwent face-to-face interviews and completed a 60 minute questionnaire in order to collect data for this study. Based on the results of the research, each segment was classified as an established, emerging, or untapped market so that the desired levels of growth within each segment could be achieved and more specific marketing strategies could be targeted towards each segment. Travel patterns and trends were easily correlated based on the segment to which the respondent belonged and psychological profiling was able to determine the types of travel and activities in which the members of each segment would be most interested. This allowed for the development of appropriate product packages targeted towards each individual segment. Based on the information gathered, tourism products and services could be more effectively promoted and the industry was able to expand to incorporate more consumers (DT Growth Strategy, 2006).

Considerations for Market Segmentation

There are several considerations when attempting segmentation of a market. To warrant a specific marketing focus, segments must be potential spenders and be interested in the products being marketed. The characteristics of people belonging to the segmented groups must be obvious and easily determined. If these traits are not

understandable or cannot be gauged, an appropriate strategy cannot be developed to effectively target the group. Segment groups must also be accessible and reachable through the marketing and promotion methods. If consumers are not exposed to the advertising, they may not be aware of the products and therefore will not spend money on them. Lastly, in order for segmentation to be worthwhile, segment groups must respond differently to the marketing strategies. Without these characteristics, segmentation cannot be an effective marketing strategy to attract different types of consumers and would be a resource-consuming and unprofitable approach (Fyall and Garrod, 2005, pg. 100, Seaton and Bennett, 1996, pg. 30).

Application of Market Segmentation to Domestic Tourism in Namibia

Since market segmentation allows for the easy collection and analysis of data, as well as the development of targeted marketing strategies, the importance of segmentation of the target group for this research project cannot be ignored. The usefulness of market segmentation can be seen from the 2006 Domestic Tourism Growth Strategy for South Africa where specific plans were developed for several different populations.

The most important descriptors to consider when collecting data on domestic tourism for the first time are age and income level (Swiegers, personal communication, 2007). This idea was incorporated into the methodology, which will be discussed later in the report. Determining Namibia's segments based on age, income range, travel group size, common destinations, transportation methods, frequency and dates of travel, and future travel plans will help the Namibia Tourism Board identify differences between tourist groups. Using the uniqueness of the different segments, the tourism industry can refine advertising strategies and employ methods to specifically market to the respective groups.

2.6 Summary

Tourism has rapidly become a vital part of a country's economics. The growth of the tourism industry within a country allows for development not only for the attraction itself but also job and marketing opportunities. Namibia's tourism potential provides an opportunity for economic progress.

It is evident that there are many factors preventing the tourism industry in Namibia from reaching its full potential. These issues include but are not limited to:

resentment between black Namibians and German descendents, the economic disparity between classes, a high unemployment rate, and the general lack of education and skills.

Through research, three types of tourism attractions were identified: heritage, cultural, and nature-based. The development, re-branding, and marketing of certain heritage and culture-based attractions could provide an opportunity for domestic tourism and preserve Namibian culture. Nature-based sites, which are often too expensive for the average Namibian to afford, may be re-evaluated and recommended to implement reduced pricing plans to expand the domestic tourism market.

Each type of tourism discussed has the potential for growth within Namibia. Heritage tourism has become evident within Windhoek in the form of educational museums. The introduction of “dark tourism” sites such as the Old Location and Shark Island may produce museums and add a new cultural dimension to the German-dominated attractions in Namibia. Cultural tourism could be implemented to celebrate the traditions of native tribes inhabiting Namibia through exhibitions, festivals, and ghost towns. The increased awareness of indigenous history will help preserve the cultural identity of Namibia. Nature-based tourism lends itself to development through implementation of additional natural preservation sites, including prehistoric dinosaur fossil sites and wildlife conservation parks.

Marketing and branding techniques must be utilized to advertise the benefits of the services provided. Research has outlined techniques for data collection to better identify customers. Segmentation of potential tourists based on age, income range, travel preferences, and future travel desires identifies different sets of consumers to which specific methods will be used to target.

Regardless of the type of tourism, the people of Namibia will benefit from the increased economy, production of jobs, and creation of new opportunities for Namibian-owned companies. Further benefits include cultural preservation, revival of traditions of local tribes to educate and teach new generations, and a strengthened identity of Namibia, a country belonging to its people.

CHAPTER 3: METHODOLOGY

3.1 Introduction

Domestic tourism can be described through two perspectives, that of the tourist and that of the service provider. It is important to understand both perspectives so that stakeholders can collaborate to develop and sustain a successful tourism market. This chapter establishes the methodology through investigating specific characteristics, wants, needs, and trends of the tourist which were analyzed and correlated based on age, income, and location to inform the status of the current tourism market in Namibia from the tourist perspective. Measuring tourist perceptions of the current tourism industry has exposed areas needing improvement with regards to tourism services and businesses that cater to Namibians. An understanding of the perceptions of service providers about domestic tourists has informed the willingness of businesses to incorporate Namibians into the industry. Through accomplishing the following objectives, this project has collected data and analyzed these trends and ideas with the aim of delivering recommendations to the Namibia Tourism Board for improving domestic tourism.

3.2 Objectives Based Methods

Objective 1: Identify current travel trends and future travels desires of domestic tourists

Objective 2: Assess the financial abilities of middle-class Namibians

The current status of the domestic tourism industry has not been addressed. It is important to understand the past travel trends of Namibians, as past behavior often predicts future behavior. Through this project, the Namibia Tourism Board sought to gather information regarding where Namibians have traveled in the past, how frequently they have traveled, when they have traveled, the duration of their stay, the purpose of their travel, the mode of transportation to arrive at their destination, the accommodations they have used, and why they have traveled to these locations. It was also important to understand the wants and needs of traveling Namibians. These included where and when Namibians would like to travel in the future, and why they desire to visit those destinations.

In addition to understanding the wants and needs of Namibians, understanding the financial abilities of potential Namibian travelers was crucial. Based on past

research, the over-pricing of accommodations and attractions is a significant problem within the domestic tourism industry. Therefore, the annual income, past travel and tourism expenditures, and the willingness of Namibians to spend on travel and tourism has been evaluated. From the collection of this data, areas for improvement were identified and a recommendation for a more precise marketing strategy was developed to facilitate the incorporation of a wider market of Namibians into the tourism industry.

To collect the desired data, questionnaires were distributed to a sample of Namibians of varying age and income levels. The questionnaire primarily consisted of multiple choice questions to allow for easy analysis. The format encouraged participation due to ease of completion. The questionnaire also included several open-ended questions so participants could elaborate on responses and provide comments and suggestions. To pre-test the questionnaires, several researchers individually reviewed and revised the questions based on all possible answers received. This was done in order to eliminate answers that would be difficult to analyze or irrelevant to the research. The final distributed questionnaires can be viewed in Appendices B and C. Detailed background on the appropriateness of utilizing these methods is discussed in Appendix A.

Middle-class Namibians were the main focus of this study. According to the Namibia Tourism Board, this economic class receives enough income to participate in travel and tourism, but may not be able to afford certain accommodations or activities. Upper class Namibians have sufficient income and already have the resources to participate in tourism, while lower-class Namibians simply do not have enough income to participate in the industry and were therefore not the focus of the conducted research. The sample of middle-class Namibians was chosen to evaluate the tourism industry and create recommendations that will improve the structure of pricing, marketing, and attractions to better fit the needs of the projected majority economic class.

In order to correlate trends between travel habits and desires based on age groups, questionnaires were distributed to students from the Polytechnic of Namibia. These students belong to the “under 25” age group, while employees from the chosen companies were predicted to vary in age from 25-60 years. It was predicted that the types of activities would vary based on age, which was useful in the recommendations for market segmentation.

To target the middle-class, a combination of convenience and purposive sampling was chosen. Convenience sampling of a population of known characteristics is a technique used to quickly gather preliminary data from the most accessible sample population (Berg, 2007, pg. 43). This method was chosen due to the time and resource constraints of this project. A more detailed background of sampling methods can be found in Appendix A. The questionnaires were distributed through e-mail and/or paper form, depending on the request of the company liaison. The companies included in the survey were Mobile Telecommunications (MTC), Telecom, City of Windhoek Tourism Sector, Namibia Tourism Board, Ministry of Environment and Tourism (MET), and Aussannplantz Standard Bank. Based on their knowledge of the Namibian economy, the Namibia Tourism Board predicted that these companies would provide an accurate representation of the middle-class in Namibia.

There were several limitations to the chosen sample. The sample size was relatively small, but was chosen due to time restrictions. Only three to four weeks were allotted for collecting and analyzing data. Although the data collected was mostly quantitative, there were several questions that allowed for explanation or elaboration. To account for this, casual conversations and interviews were conducted with survey respondents to obtain more detailed information and reasons for responses.

The survey included questions to determine past travel habits, future travel desires, the annual income of the respondent, and their willingness to spend money on travel, accommodations, and tourism activities in the future. From the data collected, relationships between income levels, travel habits, and desires were correlated. Since many Namibians complained to the Namibia Tourism Board of the high costs of travel and tourism, it was important to understand their specific financial abilities. Therefore, pricing structures of current tourism establishments were also analyzed and areas for improvements were identified.

Participants were given one to two weeks to complete and return the questionnaires to the researchers. Initially, a low response rate was experienced, so a reminder in the form of a cover letter was distributed to the participants explaining the project and detailing the importance of completing the survey. This letter was sent approximately two to three days before the questionnaires were due. This tactic was successful and over 100 completed questionnaires were received. If this had not been the case, to further improve the response rate, the due date would have been extended

and a second cover letter and replacement questionnaire would have been distributed several days after the initial due date. The original cover letter is attached in Appendix D.

To analyze the data, descriptive statistics were utilized to determine average age and income levels. Several categories of data matching were formed to account for the effects of all appropriate variables. Analysis focused on trends based on age, income, past travel habits, and future desires. The information was used to identify segmentation groups for target advertising and other segmentation purposes. Recommendations were formed from this data and are discussed later in this report.

Objective 3: Assess the perceptions and experiences of domestic tourists regarding the tourism industry

Perceptions and experiences of domestic tourists affect the tourism industry. If clients are not satisfied with services provided, return visits are non-existent and the business will receive negative branding. By assessing the perceptions and experiences of Namibians, responses were provided as recommendations for business improvement and an indication of qualities necessary to aid developing locations in becoming more successful.

Questionnaires and personal interviews were conducted to gather data on perceptions and experiences of current domestic tourists. The aforementioned questionnaire was useful to accomplish this objective. Questions specifically inquiring about perceptions remained open for written feedback. The responses gathered through use of the questionnaire provided basic knowledge of perceptions and participation within the tourism industry.

The questionnaire was selected as the preferred method to gather information because of the allowance of a large sample size, and the ability to analyze quantitative data. The questionnaire (Appendix B) was distributed to employees at MTC, Telecom, and Ministry of Environment and Tourism. A modified questionnaire (Appendix C) was distributed to students at the Polytechnic of Namibia, the employees at the City of Windhoek, Standard Bank and the Namibia Tourism Board. These companies formed the target sample of the survey resulting in the middle-class target group due to the skill level and experience necessary for each respective company and employee.

Unstandardized interviews were used in addition to the questionnaires, for reasons discussed in Appendix A, to provide insight on how domestic travelers feel about the tourism industry. The interviews were designed to better understand the personal experiences of domestic tourists. The sample participants for the unstandardized interviews were selected from employees at the Namibia Tourism Board. Age, income, gender, and ethnicity were considered when selecting the interviewees to help produce a sample representative of the Namibian population. Retaining the target group of middle-class Namibians and compromising random selection for the time restraint, employees of the Namibia Tourism Board were the optimal choice.

The limitations of this sample lie in the selection method. Ideally, a random selection of interviewees would be chosen from a large target sample group. The ability to produce a sample large enough and to arrange interviews in a timely manner would have been difficult given the time span of the project. Employees from the Namibia Tourism Board were knowledgeable about tourism destinations and were easily able to indicate their perceptions on the current industry. Since these employees fit into the targeted age and income groups, the information gathered from these interviews was expected to be representative of most domestic tourists in Namibia.

Content analysis was used to evaluate data collected from the interviews. Specific information such as perspective on services provided, similarities of common and well-liked destinations, opinions of different types of accommodations, and other re-emergent topics were noted. This information was then compiled to form a set of common opinions that were applied towards creating recommendations for the Namibia Tourism Board.

Objective 4: Identify successful practices from selected established tourist destinations.

- *Cost structures and price ranges of accommodations*
- *Branding strategies*
- *Marketing strategies*
- *Perceptions on domestic tourism market*

This objective focused on Namibia's tourism industry. As mentioned previously, tourism is comprised of two areas: tourists and industry. The first two

objectives identified domestic tourists through age, income, common trends, and future travel desires. The third objective assessed the perceptions and experiences of domestic tourists. This fourth objective explored the tourism industry through analysis of price structures, branding and marketing techniques, and perceptions of industry participants. The service providers' willingness to support a domestic tourism industry in Namibia through price reductions and other special accommodations may determine the success of Namibia's domestic tourism market.

Data collection was conducted through analysis of data of pricing structures. Observations of branding and marketing techniques were applied to companies participating in interviews to compare the interview responses with primary observations from advertisements. Interviews with service providers were unstandardized. The interview (Appendix E) consisted of questions such as: "What practices do you feel lead most to the success of your business? How do you feel about implementing a pricing plan for domestic tourists and what would that entail? Would you rather have foreign or domestic clients and why?" The unstandardized format of the interview allowed for the addition of questions and expansion to retrieve more specific data from certain interviewees.

Sample selection was limited by time and transportation. Efforts were made to physically visit every interviewee; however, due to time limitations phone interviews were necessary in some cases. A selection of accommodations, restaurants, and activity service providers were chosen from a variety of locations throughout central Namibia to represent a wide range of establishments affected by domestic tourism. Case studies such as Swakopmund, Namibia Wildlife Resorts, and other accommodations and establishments in the Windhoek area were further analyzed and compared to determine correlations between location, type of tourism, and success of local businesses.

Content analysis and triangulation were the primary data analysis methods for this objective. Branding and marketing techniques were observed and compared based on similarities in content. Perceptions of domestic tourists were gathered through interviews and analyzed through content analysis. Data on pricing was evaluated using basic statistical analysis, as well as content analysis, to indicate trends between region, percentage of domestic tourists, and price range. The information was correlated with observation and analyzed individually by all members of the team to reduce researcher bias.

The focus of the data analysis was on successful practices used by service providers, which were determined through analyzing cost data, current advertising methods, and personal interviews. Trends suggesting willingness to accommodate domestic tourists were recorded and included in the recommendations section.

3.3 Summary

This chapter has detailed the methods used to address each research objective. The first and second objective identified characteristics of Namibian travelers and current travel trends. Segmenting the population of travelers by age, income, location, transportation methods, travel months, and future travel desires has informed the Namibia Tourism Board of the current tourism market. The third objective assessed tourist perceptions of the tourism industry indicating the treatment and opinions of current travelers. The fourth objective assessed the industry. Combining information on both tourists and industry has provided a complete view of domestic tourism in Namibia and informed recommendations that are verified by multiple perspectives.

CHAPTER 4: FINDINGS

4.1 Introduction

To accomplish the four research objectives, questionnaires were distributed and interviews were conducted with domestic tourists and service providers as outlined in the previous methodology chapter. From the data collected, analysis was performed to derive a set of findings about domestic tourism in Namibia. These findings include information on current travel trends, travel expenditures and perceptions on cost, and areas for improvement within the tourism industry. Results were also correlated based on age and income levels.

4.2 Survey Data and Questionnaires – Basic Demographics

As stated, surveys were distributed to middle-class employees and students. Approximately 110 completed questionnaires were received from six companies and a local university. Table 4.1 displays the groups surveyed and the number of responses received from each group.

Table 4.1 Affiliations of Survey Respondents

Affiliation	Number of Respondents
Aussannplatz Standard Bank	5
City of Windhoek	57
Ministry of Environment and Tourism	10
MTC	2
Namibia Tourism Board	18
Polytechnic of Namibia	8
Telecom Namibia	9
Total	109

Several age groups were targeted through the questionnaires. Figure 4.1 displays the age demographics that participated in the survey. As seen, the most common ages of respondents were 26-45 years.

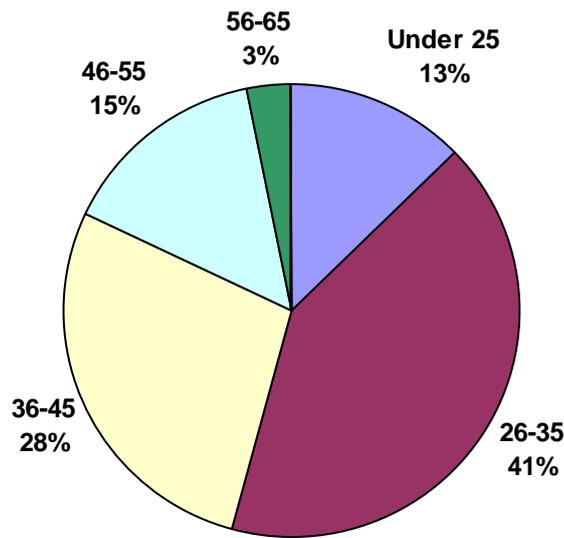


Figure 4.1 Survey Demographics Based on Age [n=94]

As targeted, middle-class Namibians comprised the majority of respondents to the survey. Figure 4.2 displays the distribution of income levels of questionnaire participants. Although middle-class Namibians were the target sample for the survey, Namibians of all income levels were included in the analysis.

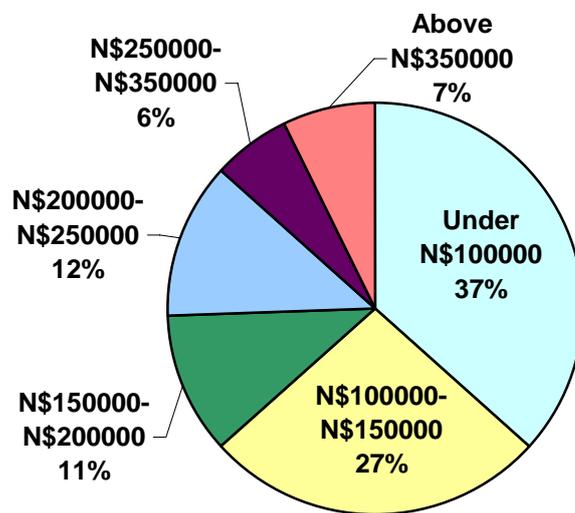


Figure 4.2 Survey Demographics Based on Income [n=98]

To obtain perceptions of both travelers and service providers, interviews were conducted. Seven interviews were obtained from domestic tourists and eleven

interviews were obtained from service providers. Table 4.2 displays the names, locations, and types of service providers interviewed.

Table 4.2 Service Providers Interviewed

Service	Name	Location
Restaurants	Napolitana	Swakopmund
Tour Operators	Desert Explorers	Swakopmund
	Wild Dog Safaris	Windhoek
Tourism Information	City of Windhoek	Windhoek
	Namib I	Swakopmund
Hotels and Accommodations	Gondwana Desert Collection	Windhoek
	Namib Sun Hotels	Windhoek
	Namibia Wildlife Resorts	Windhoek
	Protea Hotels	Windhoek
	Swakopmund Hotel and Entertainment Center	Swakopmund
	Villa Verdi Guesthouse – Leading Lodges	Windhoek

From these questionnaires and interviews, several findings were made about the current state of the domestic tourism industry.

4.3 Finding 1: Namibians Currently Travel

Current domestic tourists were targeted through the distribution of the questionnaire. Supplemental data collection was performed through interviews with both domestic tourists and tourism industry service providers. From this research, a number of generalizations were made about domestic travelers such as the seasonality of the tourism industry, amount of leave time used for travel, travel group size, transportation and accommodations used, purpose of travel, and common destinations.

Although there have been many complaints made to the Namibia Tourism Board regarding the state of the current tourism industry, questionnaires and interviews determined that many Namibians do currently travel. Approximately 79% of the questionnaire respondents reported that they travel on holiday and 61% of respondents reported that they travel on weekends. The percentages of holiday and weekend travelers were also correlated by age groups. Figure 4.3 displays this

distribution. As seen, Namibians in the “under 25” age group tend to travel more during weekends than on holiday, while Namibians of other age groups traveled more during holiday than on weekends. This could be because those under 25 years of age are generally university students with limited income, and generally weekend travel is less expensive than traveling on longer holidays.

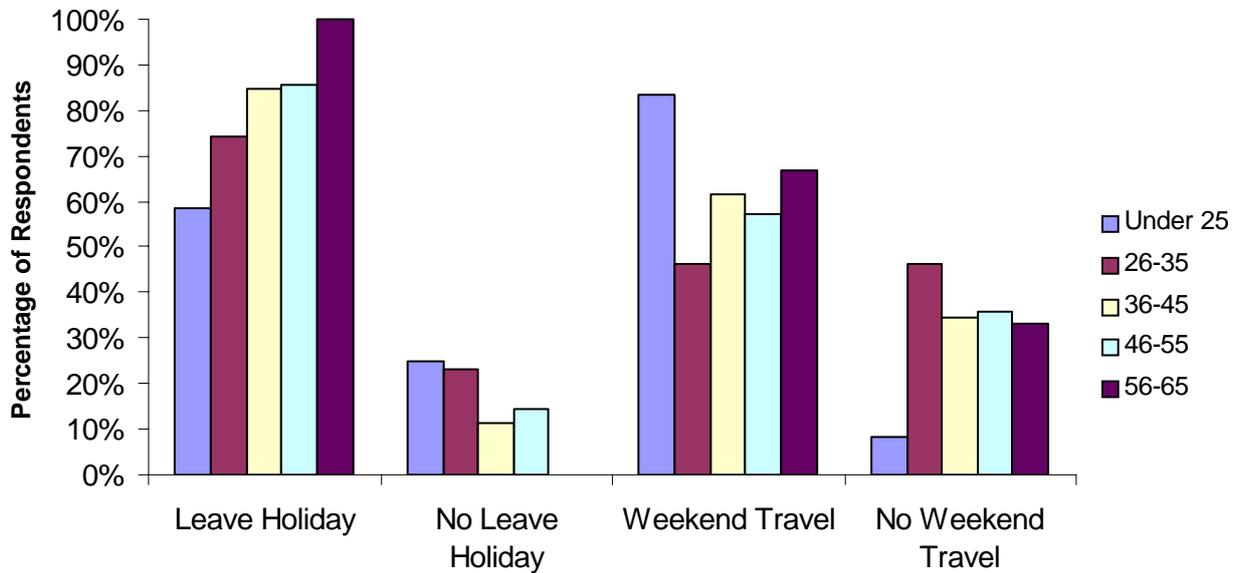


Figure 4.3 Percentage of Namibians Taking Holiday and Weekend Trips [n=94]

Namibians Travel at Different Times than International Travelers

The realization that Namibians are currently traveling both on holiday and on weekends lends itself to the question of when they travel throughout the year. This data was collected through questionnaires. The data on domestic tourism was compared to data collected by the Namibia Tourism Board for the Tourism Satellite Account regarding the months of high international arrivals. Tourists travel most often in the months displayed in Figure 4.4. As seen from the chart, the most popular months of domestic travel are April, May, and December, while the months of July through November are popular among international travelers. This suggests a seasonal tourism industry consisting of peak and off-peak seasons which is most likely due to the differences in public and school holidays between Namibia and European countries. The seasonality creates the potential for improvements in domestic tourism as far as off-peak pricing plans for locals, which will be discussed later in the report. Also seen from the graph is that international travel dominates domestic travel in all months with the exception of December. This lack of domestic travel suggests potential for the domestic tourism industry to be developed.

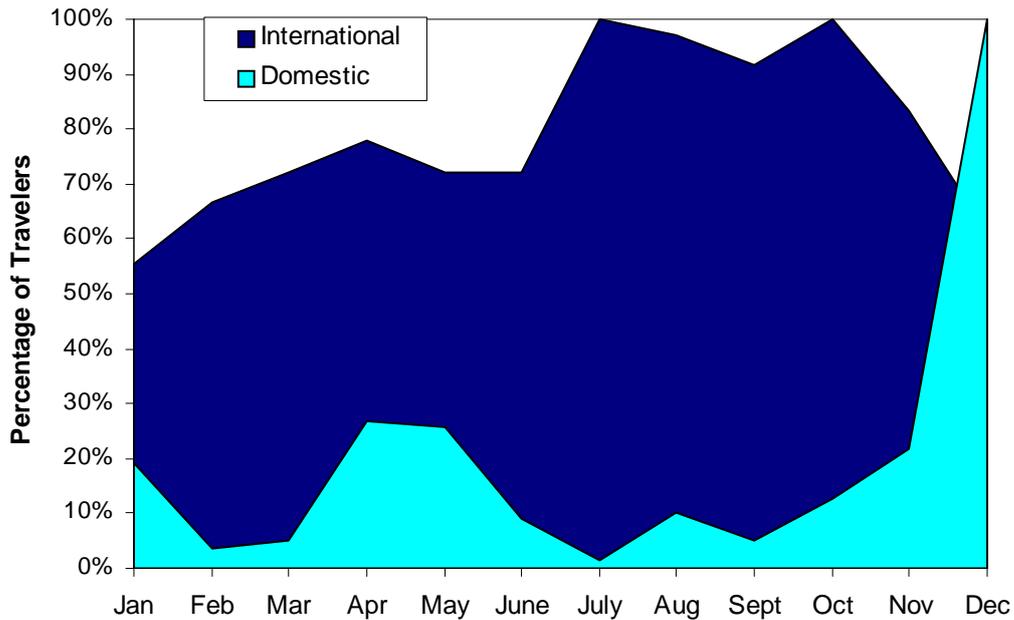


Figure 4.4 Months of Domestic and International Travel [n=104, n≈171,000 (TSA, 2004)]

Namibian Traveler Demographics

Several characteristics were discovered regarding Namibians who currently travel. Analysis of the questionnaires revealed that most Namibians travel in groups of 1-7 people. These groups include immediate family (spouses, children, and siblings), older parents, and friends. In general, travel group size and family size correspond, further supporting that Namibians generally travel with family members. Figure 4.5 displays the distribution of family size in relation to travel group size. It can be noted that the distributions are similar between the two series. Understanding how many people travel together is important because it can influence which locations are visited and which accommodations are used by Namibian travelers due to the cost associated with holiday traveling.

Travel group size can also influence the mode of travel. Figure 4.6 displays the most common methods of transportation used by Namibian travelers. As seen, cars are the most popular means. Namibia's transportation infrastructure is currently not conducive to public transportation due to rough terrain and large distances between domestic tourist destinations, slow service with passenger trains, inaccessibility of bus schedules, and costliness of public transportation, which were common complaints among questionnaire respondents and will be discussed further later in this chapter.

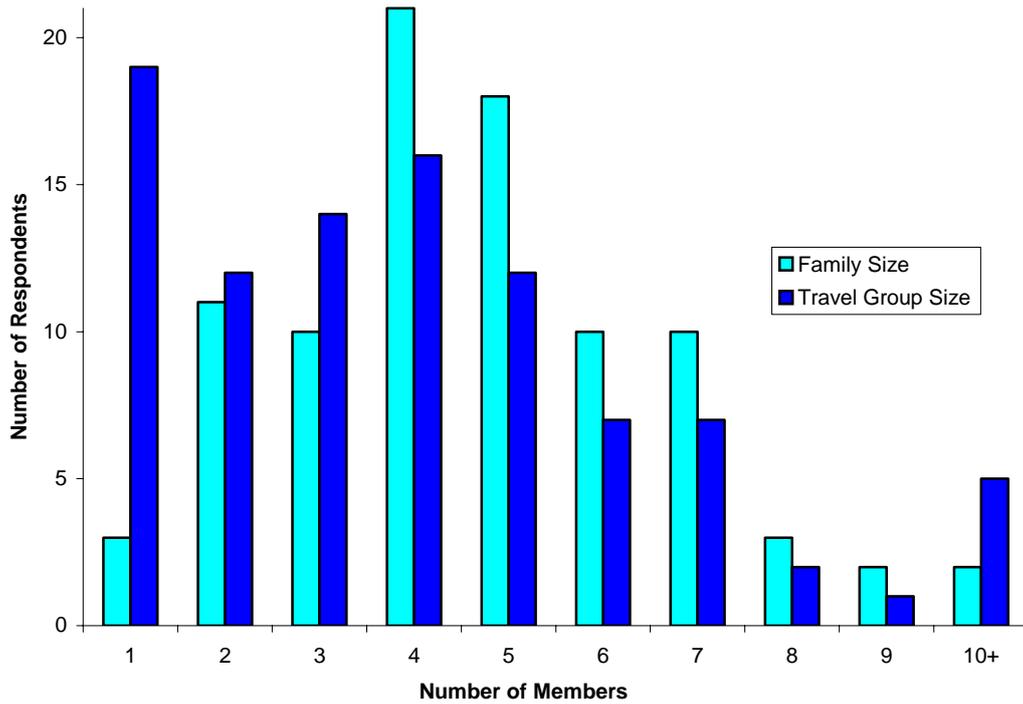


Figure 4.5 Number of Family Members vs. Travel Group Size [n=85]

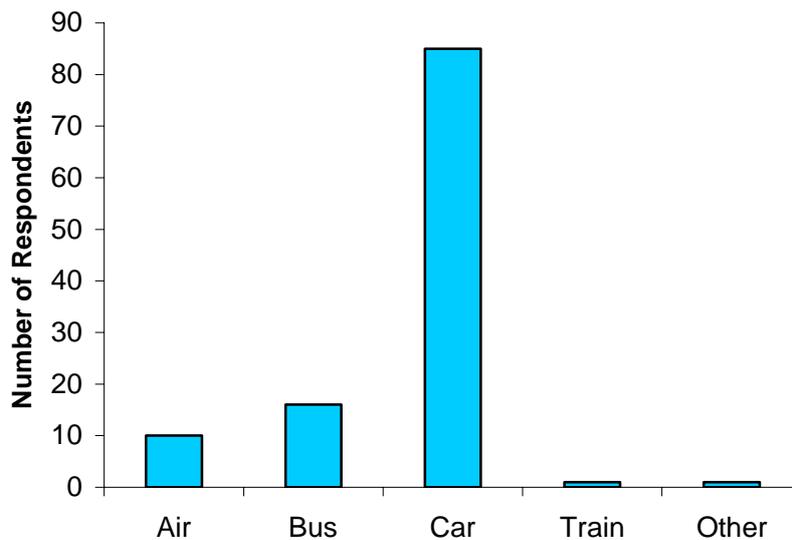


Figure 4.6 Modes of Transportation Used by Namibian Travelers [n=101]

Figure 4.7 compares the number of leave days to which Namibians are entitled with the number of days used for holiday travel. From the data, the Namibian respondents generally used half of their leave time for travel. Through interviews, it was determined that many Namibians like to travel “one week here, and one week there,” while spending their remaining leave time resting and relaxing at home. This also shows that there is a potential for more holiday travel during leave time; however,

other factors such as travel cost restrict the number of holidays taken and must be addressed.

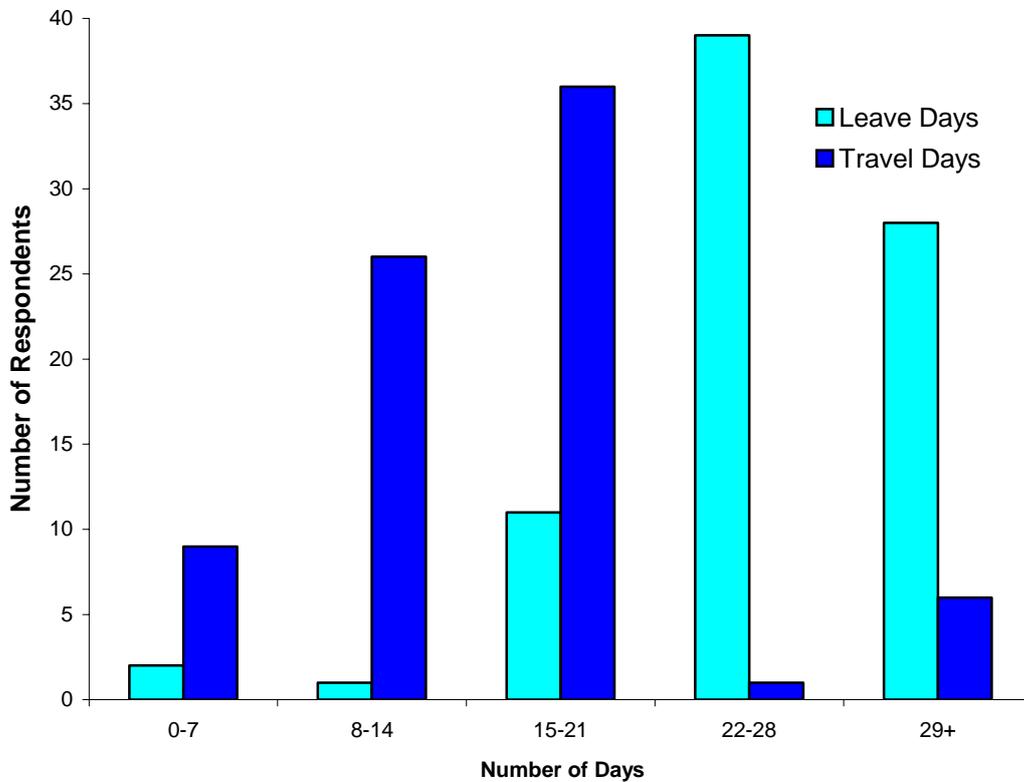


Figure 4.7 Number of Leave Days per Year vs. Number of Days Used for Travel [n=81, n=78]

The number of weekends during which Namibians take holiday can be seen from Figure 4.8. Generally, Namibians use less than 10 weekends per year for travel. This can be attributed to the high costs associated with travel. One interviewee stated that she is only able to travel once every 5th weekend since travel is too expensive. These trends support the second finding that tourism is too expensive, which will be discussed in the upcoming section.

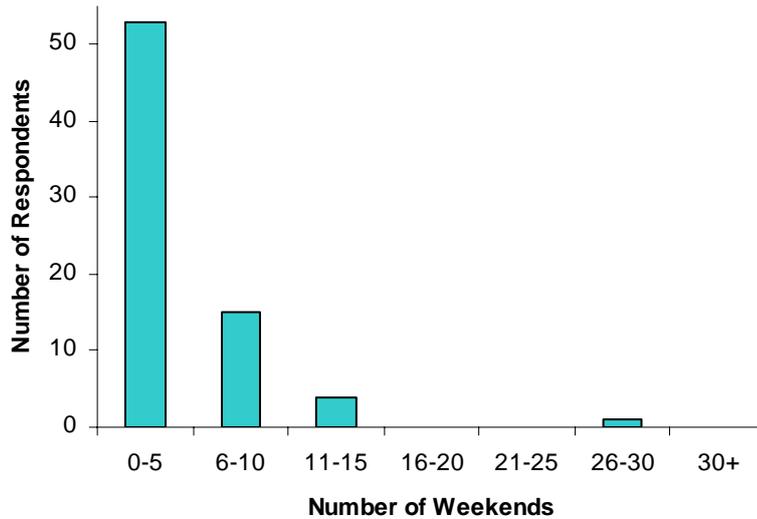


Figure 4.8 Number of Weekends per Year Utilized for Travel [n=73]

Destinations of Namibian Travelers

The data collected from the distributed questionnaires showed that several destinations throughout Namibia are frequently visited by domestic tourists. Figures 4.9 and 4.10 display the various domestic tourist destinations for holiday and weekend travel respectively. For longer holidays, Namibians prefer to travel to Swakopmund or South Africa. By attracting the Namibian tourists that currently travel to South Africa to travel in Namibia, there is potential for increasing domestic tourism. Comments from the questionnaires stated that Namibians travel outside of the country, such as to South Africa, due to the high cost of accommodations in Namibia. For weekend travel, Swakopmund is the most popular destination. As discovered through observation and casual conversations with employees at the Namibia Tourism Board, Swakopmund and the surrounding coastal towns are popular destinations during the school holiday in December.

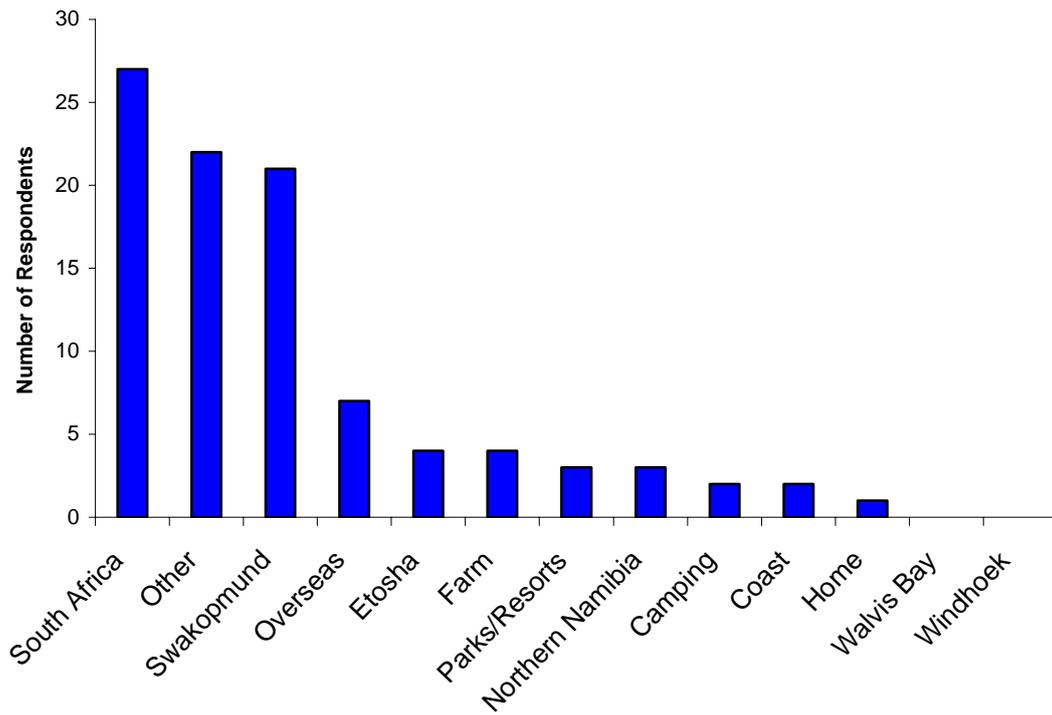


Figure 4.9 Holiday Destinations of Namibian Travelers [n=71]

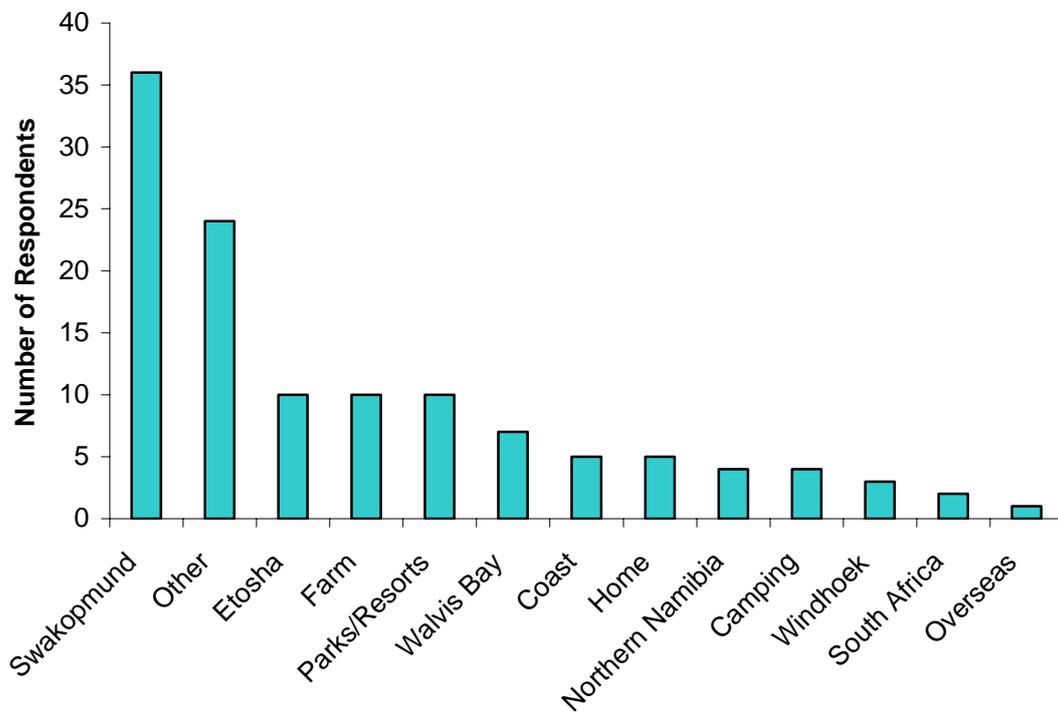


Figure 4.10 Weekend Destinations of Namibian Travelers [n=75]

Data analysis was also performed to determine domestic tourist locations. The Namibia Tourism Board provided data from the annual levy forms of every accommodation registered with the NTB. The data included the hotel establishment name and location, the number of beds available, the number of beds sold within a given period, reason for the guest's stay, nationality of the guests, the amount of revenue produced in a given period, and the amount of levy paid to the government.

Data was analyzed to determine trends between location of stay, which was categorized by town, and the nationality of the visitors. Percentages of Namibian guests per month were compared to the number of beds sold per month. From this analysis, each town was classified as either a domestic or international tourist location. Many locations in central and northern Namibia, such as Oshakati, Rundu, and Tsumeb, were found to cater to both international and domestic tourists. Southern and coastal towns, such as Lüderitz and Grünau, attracted mainly international guests, particularly Germans. In correlation with data collected from the questionnaires, Swakopmund and Walvis Bay were also found to be popular among domestic tourists. Figure 4.11 displays a color-coded map depicting the distribution of stays based on nationality of the guests.

Several limitations were present when analyzing this data. Many accommodation establishments did not provide all of the necessary data on the distributed form. Out of 10,002 data points, only 5,535 data points gave information regarding both the number of beds sold per month and the nationality of the guests. These data points were used in the analysis of hotel guest nationality.



Figure 4.11 Hotel Guest Frequency Based on Nationality [n=5535]

Purpose of Travel

Determining the purpose of travel for domestic tourists is crucial for successful marketing techniques since target advertising must reach the correct segmentation groups to be most effective. Four types of travel were categorized in the questionnaire: visiting friends and relatives (VFR), leisure, business, and other. The percentage of travelers engaging in each type of travel can be viewed in Figure 4.12. As seen from the figure, the number of Namibians traveling for VFR and the number traveling for leisure purposes are approximately equal. This suggests there is already an emerging domestic tourist market in Namibia that has the potential to grow. Developing leisure travel is important because it can contribute more money to the economy and create employment opportunities. A total of 93 participants responded to this question. Several participants gave multiple responses creating a total of 113 answers.

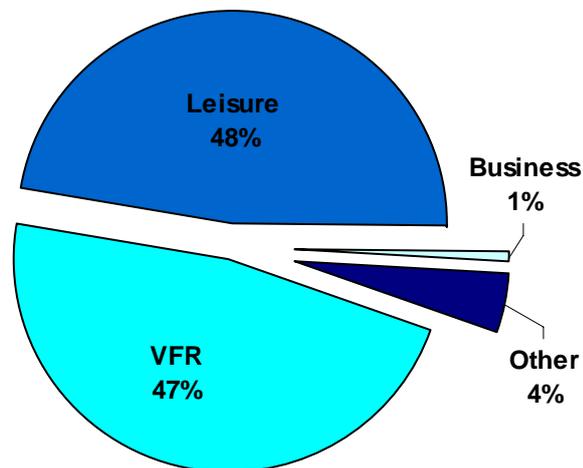


Figure 4.12 Purpose of Travel and Tourism among Namibians [n=93]

Figure 4.13 displays the purpose of travel based on age group. As seen, the youngest and oldest age groups predominantly travel for VFR purposes, while those in the mid-range of age groups travel approximately equally between VFR and leisure. Namibians in the 46-55 age group travel mostly for leisure purposes. These findings may be because those Under 25 years of age are college students traveling back to their homelands during school holidays. It was suggested through interviews and conversations that those in older age groups are also traveling home to visit elderly parents.

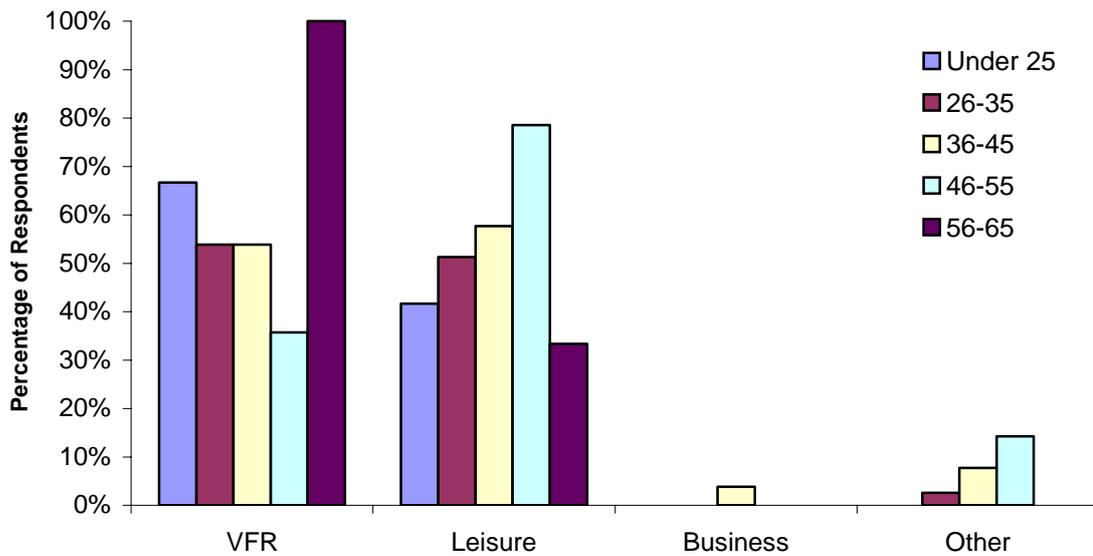


Figure 4.13 Purpose of Travel Based on Age [n=93]

Figure 4.14 displays the purpose of travel based on income level. Not surprisingly, Namibians from higher income levels travel more for leisure purposes, which often requires more disposable income than other types of travel due to the accommodations needed and the activities in which travelers participate.

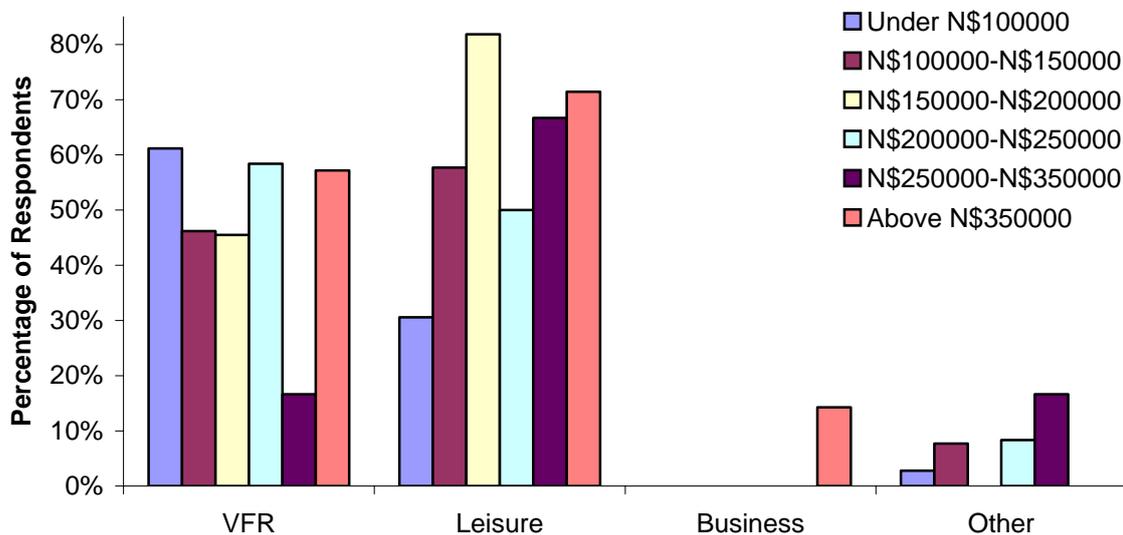


Figure 4.14 Purpose of Travel Based on Income Level [n=93]

Accommodations

Understanding that Namibians mostly travel either for leisure or VFR purposes leads to the question of where travelers stay. The distribution of

accommodations used by Namibian travelers is illustrated in Figure 4.15. Ninety respondents answered this question. A total of 148 responses were received, as several participants answered multiple selections.

Since 47% of the respondents travel for VFR purposes, it is not surprising that 35% of the respondents reported that they stay with family. Of those who travel for leisure, most utilized bed and breakfast guesthouses or camping facilities, which are generally less expensive than hotels and lodges. Through interviews, it was discovered that Namibians want to stay in the hotels and lodges, but the cost of such accommodations prevents them from doing so. This suggests the need for off-season pricing plans which will be discussed in a later chapter.

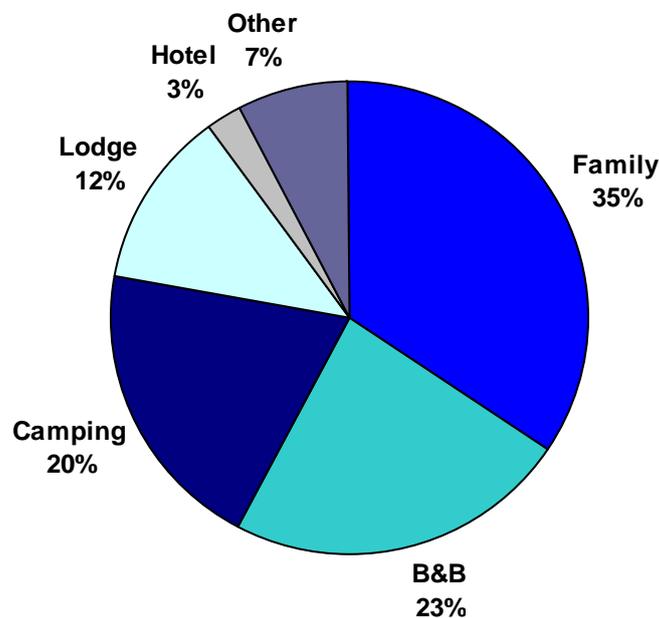


Figure 4.15 Accommodations Used by Namibian Travelers [n=90]

Accommodations used by Namibian travelers were also correlated by age and income. Figures 4.16 and 4.17 display these distributions respectively.

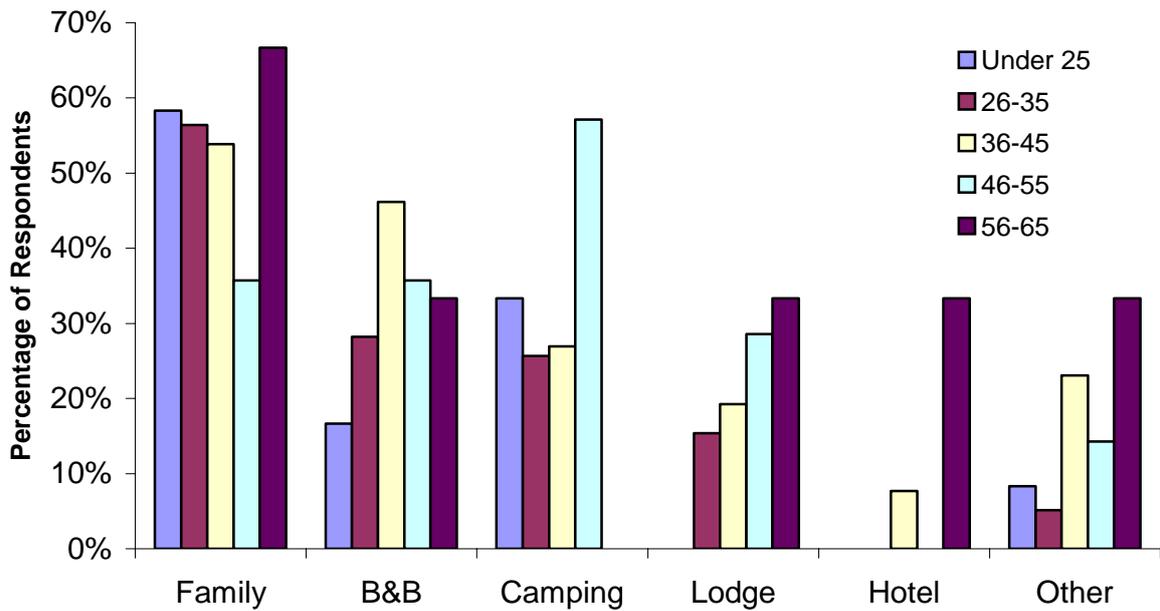


Figure 4.16 Accommodations Used Based on Age [n=90]

As seen from Figure 4.16, the majority of Namibians in most age groups utilized staying with family and relatives most frequently. However, people within the 56-65 year age group utilized the more luxurious accommodations such as lodges or hotels more frequently than travelers in other age groups.

Namibians from higher income levels tended to stay in accommodations such as bed and breakfasts, lodges, and hotels which cost more money than camping sites or staying with family. These trends are seen in Figure 4.17.

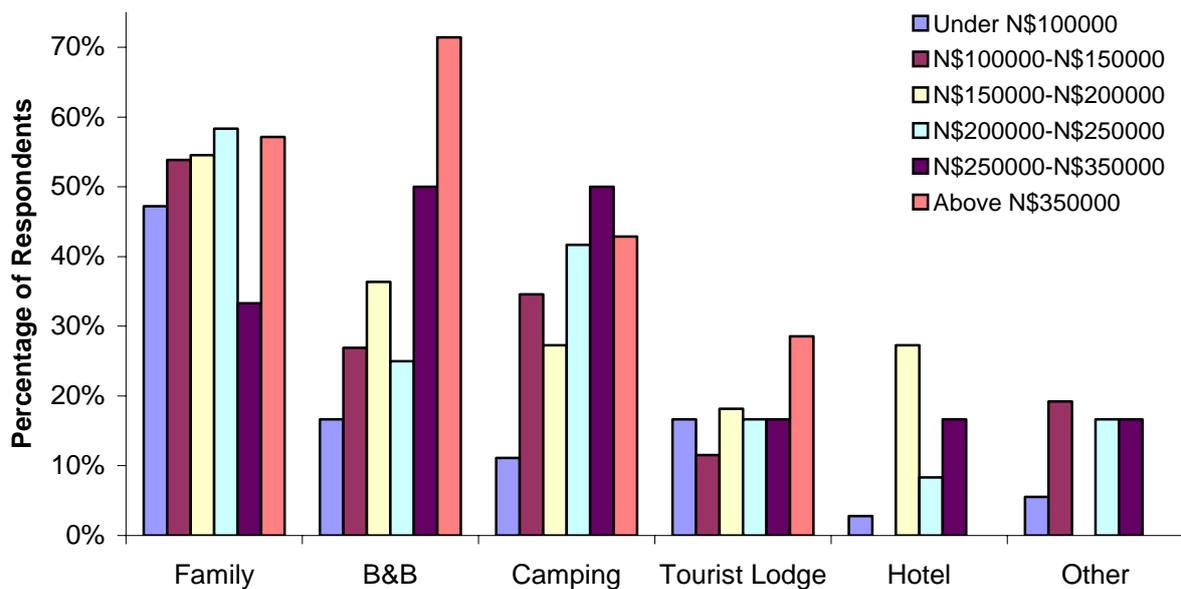


Figure 4.17 Accommodations Used Based on Income [n=90]

Future Travel Desires of Namibians

Since it was determined that Namibians do travel, it was important to understand whether or not they would like to continue to travel within Namibia, as this is critical to sustaining a successful domestic tourism industry. Domestic tourism in Namibia depends on citizens' preferences towards traveling within their own country. It cannot flourish if Namibians are not willing or cannot travel within their own country due to factors such as service and cost. From the questionnaires, it was determined that the majority of Namibians would like to stay within Namibia while traveling. Figure 4.18 displays this information.

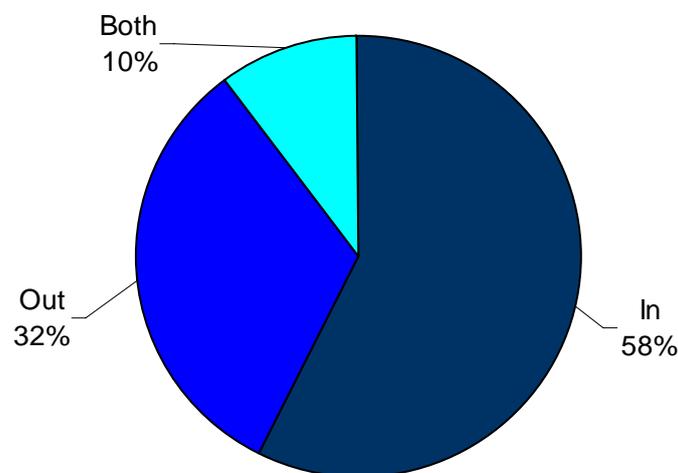


Figure 4.18 Preferences Of Namibians Towards Traveling In or Out of Namibia [n=96]

To better understand the types of attractions Namibians would like to visit within Namibia, questionnaire respondents were asked to rate five types of attractions: historical, nature-based, adventure, cultural, and other activities such as restaurants or children's attractions. Figure 4.19 displays the types of activities that Namibians would like to participate in within Namibia. As seen from the graph, nature-based tourism interests the majority of Namibians. These desires, combined with the abundance of natural phenomena in Namibia, lend themselves to the development of more nature-based attractions as is discussed later in the recommendations.

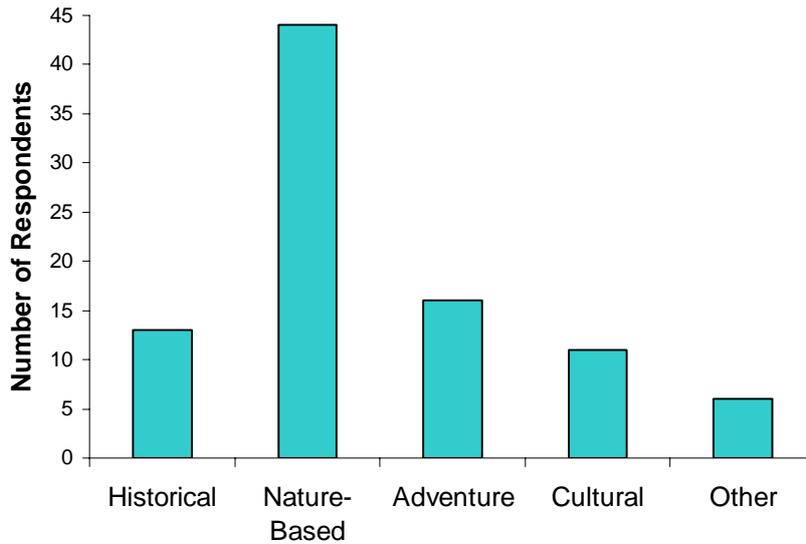


Figure 4.19 First Choice Tourist Activities among Namibians [n=90]

The types of attractions desired by each age group targeted by the questionnaire were also correlated. Although the significant majority of Namibians overall were found to prefer nature-based attractions, several age groups preferred one type of attraction over another. For example, Namibian respondents in the 56-65 age group preferred cultural attractions over other types of attractions while those in the 36-45 age group preferred historical attractions. The distribution of age vs. desired activities can be seen in Figure 4.20. These correlations can aid in market segmentation.

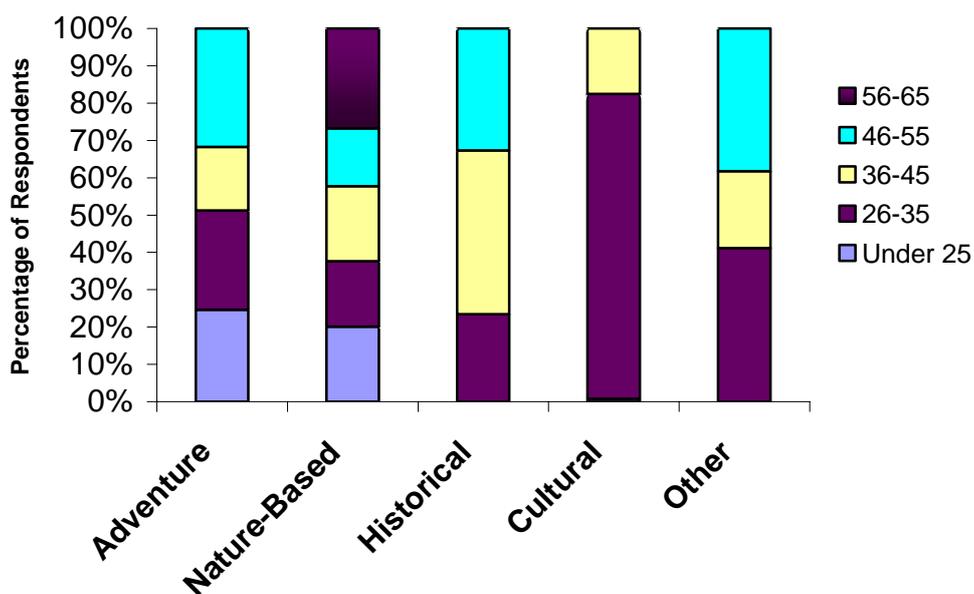


Figure 4.20 Desired Tourist Activities Based on Age [n=90]

In addition to age, desired activities were correlated based on income level. Figure 4.21 displays the distribution. As seen, respondents falling within the highest income levels solely desired nature-based and adventure tourism attractions, which tend to be more costly than other types of activities. No other significant trends were seen among other income groups.

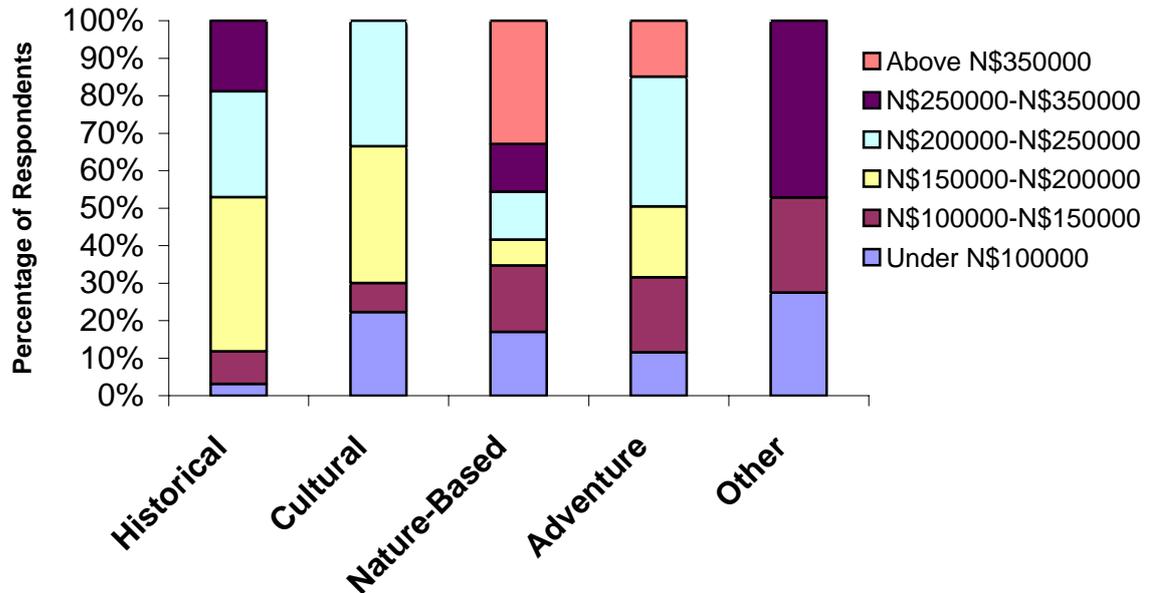


Figure 4.21 Desired Tourism Activities Based on Income [n=84]

Namibians Who Do Not Travel Would Like to Travel in the Future

Understanding if non-traveling Namibians would like to travel and where they would like to travel is important for domestic tourism. Figure 4.22 displays the locations where non-traveling questionnaire respondents reported they would like to travel in the future. As seen, 45% would like to remain in Namibia. By appropriately marketing affordable attractions to these Namibians, domestic tourism can grow.

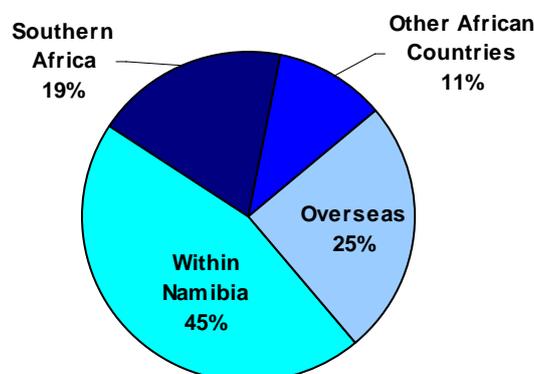


Figure 4.22 Destinations in Namibia of non-Traveling Namibians [n=43]

Namibians who would like to travel within Namibia in the future were asked to report specific destinations they would like to visit. Figure 4.23 displays these destinations.

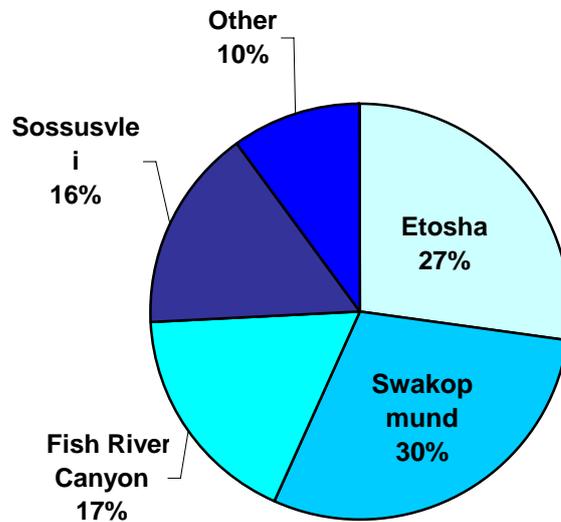


Figure 4.23 Desired Destinations within Namibia of non-Traveling Namibians [n=43]

As evident from the previously mentioned findings, domestic tourists, both currently traveling and non-traveling, would prefer to travel within their home country in the future. Findings indicate the desire for Namibians to travel to destinations such as Swakopmund and Etosha National Park. From these findings, recommendations were made to improve these specific locations to cater to domestic tourists and encourage Namibians who are not currently traveling to travel in the future. Preferences of attractions were also considered when composing recommendations. Expanding specific types of activities will help improve domestic tourism and encourage more Namibians to travel.

Summary

Through analysis of questionnaire responses and interview data, conclusions were made about the “who, what, where, when, and why” regarding the Namibian domestic tourist. Findings based on age, income, transportation, accommodations used, common destinations, and other previously discussed conclusions will be applied to segmentation techniques for improving marketing strategies as well as recommendations for improving the domestic tourism market.

4.4 Finding 2: Namibians Believe Tourism is Too Expensive in Namibia

The issue of pricing was a reoccurring theme found in both the questionnaire and interview responses. Figure 4.24 displays the perceptions of pricing within the tourism industry, as found from the questionnaires. As seen from the chart, 60% of respondents reported that travel and tourism in Namibia is too expensive.

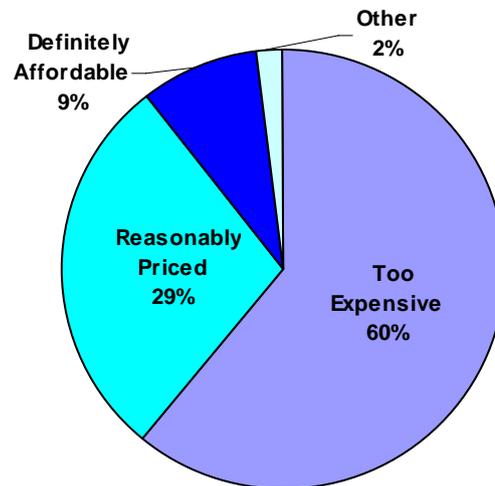


Figure 4.24 Domestic Tourists' Perceptions on Tourism Pricing in Namibia [n=104]

Figure 4.25 displays the distribution of perceptions on tourism pricing based on income level. In general, fewer respondents within the larger income groups responded that tourism is too expensive as opposed to reasonably priced. Interestingly, the people who responded that tourism is affordable fell into the lowest income levels for unknown reasons. Further research should be conducted to correlate the types of attractions and accommodations utilized by those with this perception.

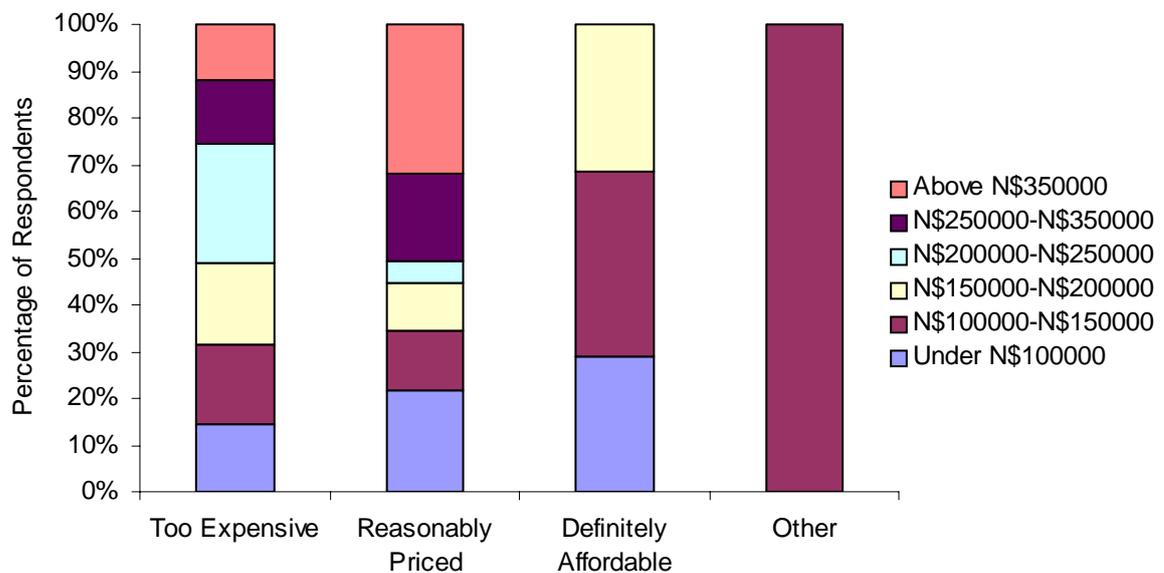


Figure 4.25 Perceptions of Pricing of Tourism in Namibia Based on Income Level [n=104]

Since most Namibians think tourism is too expensive, the question arises of where travelers stay and in what activities they participate. As discussed through the previous finding, travelers are evenly split between VFR and leisure travel. The largest percentage of travelers stay with friends and relatives which costs little to no money or utilize camping facilities or bed and breakfast guesthouses which are considerably less expensive than luxury hotels and lodges, supporting that travelers believe tourism is too expensive. These trends appear in Figure 4.15-4.17.

Of the questionnaire respondents who reported that they did not travel, 71% said it was because tourism is too expensive in Namibia, as seen in Figure 4.26. This suggests the importance of an appropriate pricing plan to encourage domestic travel, which will be discussed later in the report. Understanding the reasons why Namibians currently do not travel informs areas for improvements. These recommendations can be applied within the tourism industry to accommodate more domestic tourists.

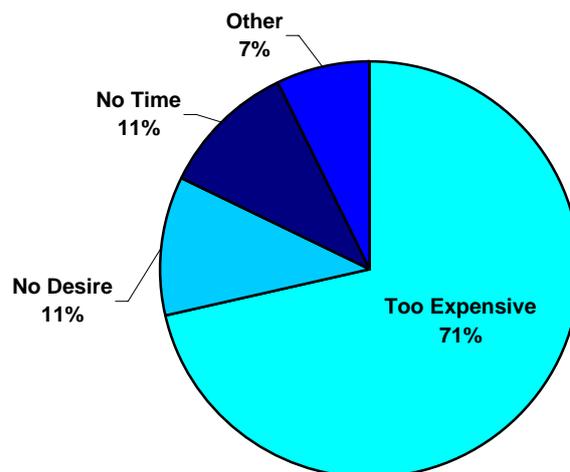


Figure 4.26 Reasons Why non-Traveling Namibians Do Not Travel [n=28]

Since it was determined that Namibians currently travel but feel that travel is too expensive, it was important to understand how much they have spent on tourism in the past and how much they would be willing to spend on tourism in the future. Questionnaires were used to determine these trends.

Past Travel and Tourism Expenditures

Namibians who currently engage in tourism generally spend less than N\$1500 on travel, accommodations, food, and activities each per person per holiday. These expenditure trends can be seen in Figure 4.27. Based on the data, it also appears that

Namibians tend to spend money on the extreme ends of the spectrum. As seen from the chart, the middle ranges of expenditures are sparsely populated, especially in the categories of travel and accommodations. This trend was also seen during interviews where it was reported by service providers that Namibians either utilize the simplest accommodations or desire more luxurious accommodations. This data was also correlated based on income. The respondents in the higher income ranges generally spent more on travel than those in the lower income ranges, which shows a relationship between income level and the amount of disposable income that can be allotted for travel.

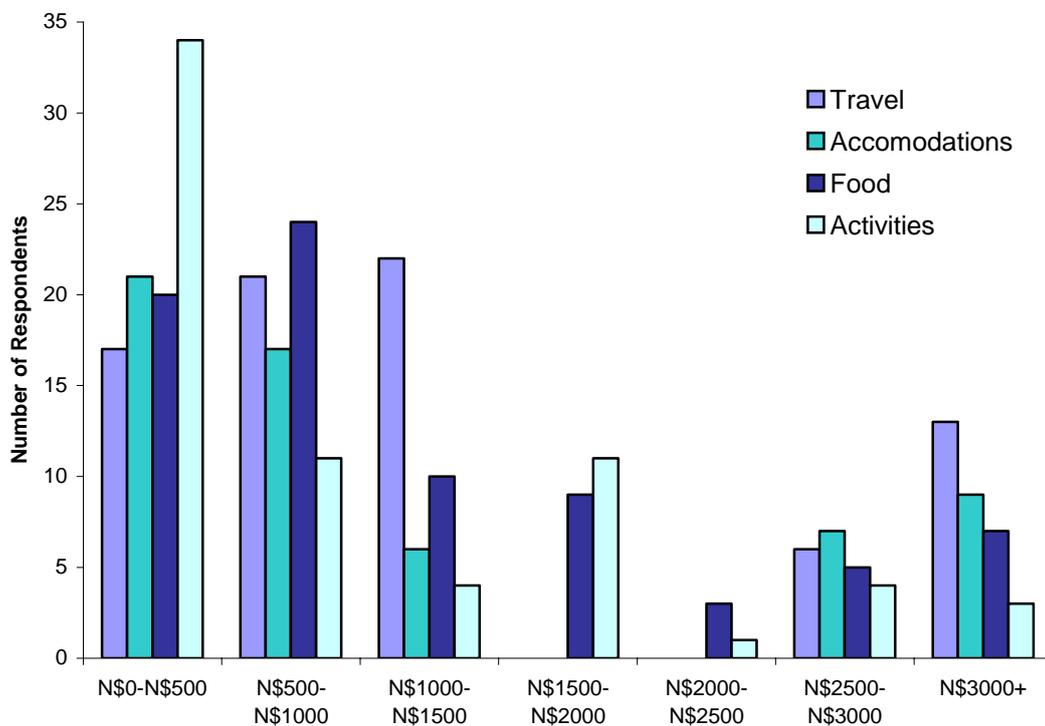


Figure 4.27 Expenditures of Namibian Travelers (per person per holiday) [n=80]

Willingness to Spend on Travel and Tourism in the Future

Figure 4.28 displays the willingness of Namibians to spend money on travel and tourism in the future. The graph displays amounts based on spending per person per day. As seen, most Namibians are willing to spend under N\$500 per person per day in all categories of tourism (travel, accommodations, activities, and food).

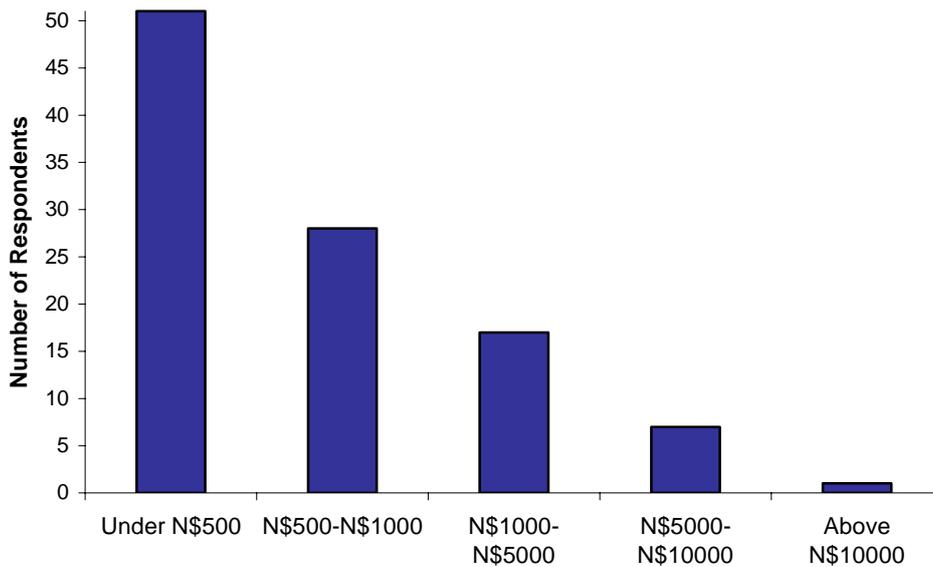


Figure 4.28 Amount Namibians are Willing to Spend Per Person Per Day on Travel and Tourism in Namibia [n=104]

Figure 4.29 displays the willingness to spend money on travel and tourism based on income level. The chart shows respondents in the higher income ranges generally are willing to spend more money than those in lower income levels. Interestingly, the sole person who responded that they were willing to spend above N\$10,000 per person per day belonged to the lowest income level, under N\$100,000 per year. This contradicts the findings; however, this result could be due to misinterpretation of the questionnaire or other bias.

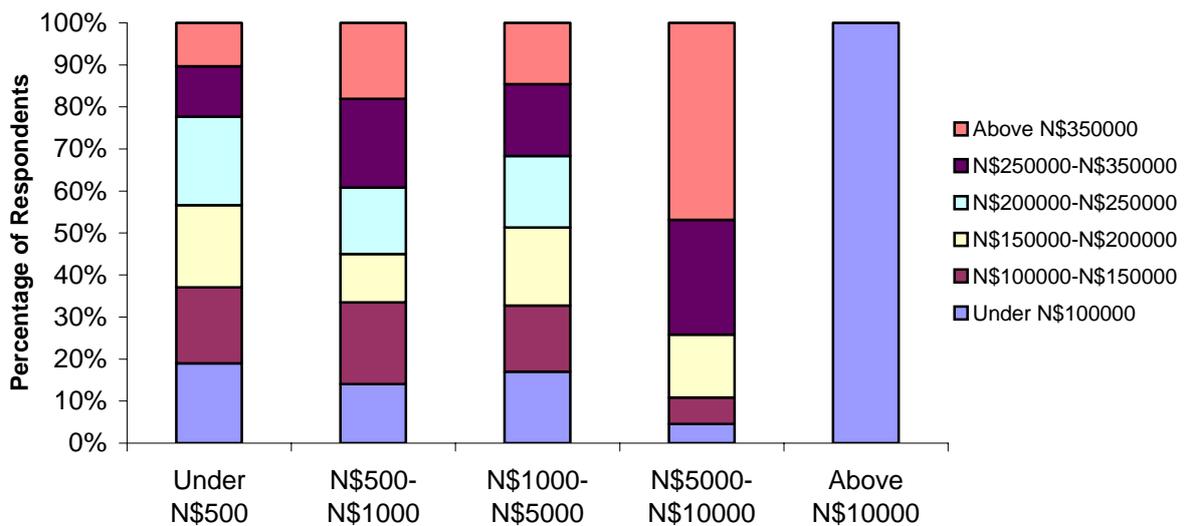


Figure 4.29 Amount Namibians are Willing to Spend on Tourism per Person per Day Based on Income Level [n=104]

Data Analysis of Accommodation Pricing

Since many Namibians commented through questionnaires on the high pricing of accommodations, pricing data provided by the Namibia Tourism Board was analyzed to determine the validity of these claims. Average bed rate and percentage of Namibian guests at establishments registered with the NTB could be determined from the data. This information was used to determine if a correlation existed between the rate of the room and the percentage of Namibian guests. Average room rate was determined by dividing monthly revenue by the number of beds sold during that month. Out of 10,002 data points provided, only 2,736 data points included the necessary information to complete these calculations, as several accommodation owners did not complete the levy return form properly.

The data did not show any correlation between bed rate and percentage of Namibian guests. However, it was determined that Namibians prefer to spend under N\$500 per night on accommodations, corresponding with data collected through the questionnaires. Through analysis of all hotel pricing data provided by the NTB, the average rate of an accommodation in Namibia was calculated to be N\$298.69 per night. The 50th percentile for the average room rate was \$250.24, meaning that 50% of the rooms cost less than this amount, while 50% of rooms cost more than this amount. Since the data included rest camps and bed and breakfasts in addition to hotels and lodges, it correlated to the previous finding that Namibians generally stay in less expensive accommodations rather than more luxurious accommodations.

Summary

Overall, both the questionnaires and hotel pricing data analysis determined that Namibians who are traveling are spending money in the domestic tourism market. These findings indicate a willingness to continue spending money on tourism in the future. However, a disparate relationship exists between current pricing and past expenditures in the tourism industry versus how much Namibians are willing to actually spend on tourism in the future. This stems from the lack of effort among service providers to match domestic tourists' needs in terms of reduced pricing. Recommendations were made to help improve the pricing of tourism-related services throughout the country. If pricing does not change or increase, domestic tourists will no longer be able to travel within Namibia and the domestic tourist market will diminish.

4.5 Finding 3: The Tourism Industry Does Not Cater To Namibians

Responses to the questionnaire prompted participants to elaborate on areas in which they would like to see improvements within the tourism industry. Figure 4.30 describes the most common responses. The majority of the respondents desired to see improvements regarding the pricing of tourism activities and accommodations currently available in Namibia. Other comments included the need for increased and affordable transportation around Namibia, as well as an increase in the variety and accessibility of attractions. Quality of service was also a common theme in many completed questionnaires and interviews which will be discussed later in this section.

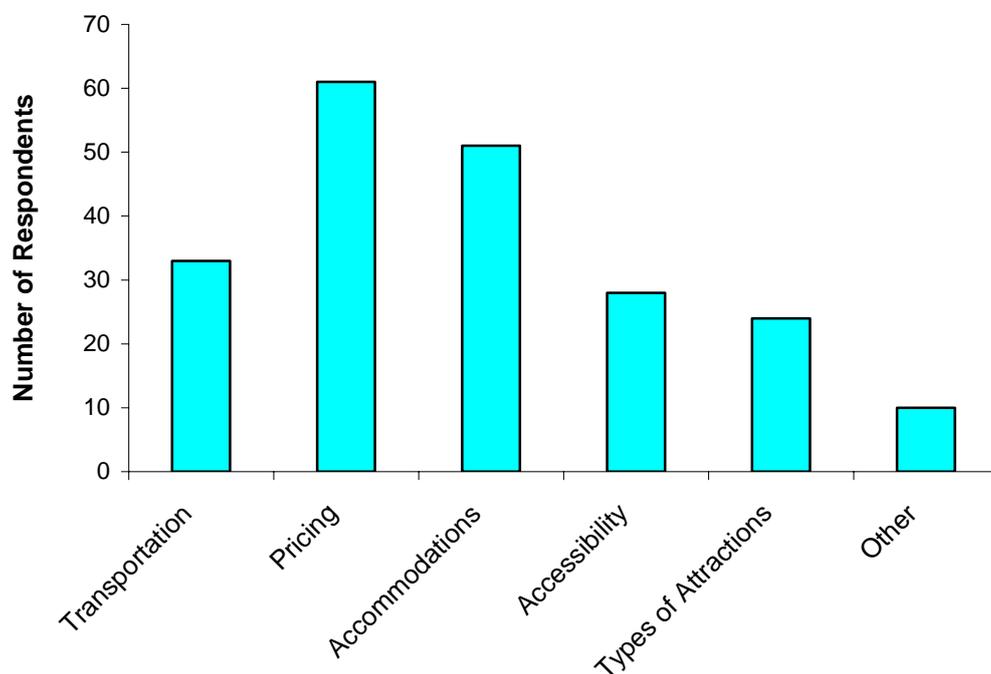


Figure 4.30 Perceptions of Namibian Respondents on Areas for Improvement in Travel and Tourism [n=104]

As seen from the graph, pricing was the most common concern. The costs of accommodations and activities are currently beyond the reach of the average Namibian, which prevents domestic tourists from traveling and utilizing these establishments. Some companies already offer reduced rates for domestic travelers; however, this needs to be implemented throughout the country in order to encourage domestic travel. Marketing of these discounts also needs to be improved, as many service providers explained that most marketing efforts are focused towards internationals. Recommendations concerning pricing are discussed later in the report.

As previously stated, poor quality of service was a also common complaint among questionnaire respondents as well as interview participants. Although most Namibians said that they felt comfortable traveling as domestic tourists, they reported that they did not feel they received the same services as foreign tourists. One interviewee described such an experience. Since friends were visiting from Norway, the interviewee made reservations at an accommodation, requesting that traditional Namibian food be provided. Under the impression that the group was international, the service provider willingly agreed to comply with their request. Once the group arrived and the service provider realized that the Namibian traveler was providing payment, services were cut back. It was not until the interviewee showed his Namibia Tourism Board employee card that services were provided to the travelers' satisfaction. Several other interviewees reported similar experiences, explaining that service providers automatically view Namibian travelers as looking for discounts and not having the ability to pay, therefore offering less than satisfactory service regardless of the amount actually being tendered. Others commented on the poor quality of service in general, stating that many service providers did not understand the importance of cleanliness, suitable accommodations, and friendly services to the guest experience.

As a result of both high pricing and poor quality of service, Namibian attendance at accommodations is low. Through analysis of data collected by the Namibia Tourism Board, the number of rooms sold to guests of various nationalities was determined and compared. As shown in Figure 4.31, only 31% of beds sold in Namibia were sold to Namibians, an equal amount to the number of beds sold to German travelers. Limitations of this data were that only 7,901 of 10,002 data points provided information concerning nationality of the guests.

In comparison to other successful domestic tourism industries, the percentage of Namibian guests utilizing accommodations is unsatisfactory. It must be increased in order for domestic tourism to become sustainable and successful in Namibia.

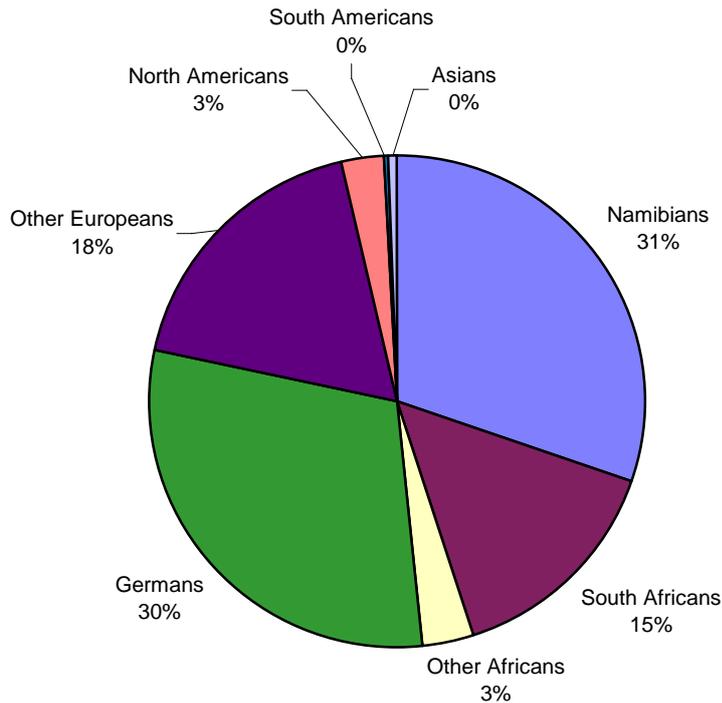


Figure 4.31 Nationality of Guests Utilizing Accommodations in Namibia [n=7,901]

To further determine reasons why the domestic tourism industry in Namibia has not progressed, interviews with service providers were conducted. Prior to the interviews, a small fraction of companies were expected to have implemented pricing plans for domestic tourists. The questionnaire responses and complaints about pricing led to the initial conclusion that package deals and reduced prices did not exist throughout most of the Namibian tourism industry. However, the interviews revealed that an unexpected number of companies already provided reduced pricing plans or off-season discounts for Namibians. Others were in the process of evaluating such plans. Accommodation price reductions were found to be as high as 50% at some establishments. Other establishments used the B.A.R. (best rate available) system. This system calculates the most profitable rate based on the fluctuation of tourist arrivals during the different tourist seasons. These B.A.R. rates apply to all tourists, whether domestic or foreign, although further discounts are often applied for Namibians in addition to the B.A.R. prices.

Since a significant amount of interviewees and questionnaire respondents reported that pricing was a huge problem and that no special package deals or price reductions were available, the inconsistency between these complaints and the number of service providers offering discounts to Namibians may be attributed to a

lack of marketing. Service provider interviews revealed correlations between marketing strategies and the lack of domestic tourist attendance. While many businesses did provide price reductions for Namibian tourists, marketing techniques were aimed at an international audience, mainly Germany, the United Kingdom, France, and Scandinavian countries. Archival research into the Tourism Satellite Account has shown the need for domestic tourism in terms of market stability, as well as to supplement off-season profit decline when international travel decreases. By increasing marketing focused on domestic tourists, an increase in holiday travel and improvements in domestic tourism are expected.

Overall, thorough analysis of the current tourism industry has led to the conclusion that the tourism industry does not cater to middle-class Namibian travelers at the current time. As demonstrated through the previous findings, Namibians cannot afford and are unwilling to pay the high costs established by tourism service providers for accommodations and other activities. Additionally, many service providers do not provide the same services to Namibian travelers as to foreign travelers as discovered through personal interviews with domestic tourists. Most service providers interviewed said that they would be willing to adjust pricing plans for locals during the off-season in order to accommodate more Namibians at their establishments. These responses have been considered for recommendations and will be discussed later in the report.

4.6 Summary and Conclusions

Through analysis of data collected from questionnaires and interviews, findings were produced about the current domestic tourism market and future desires of tourists and the tourism industry. Many aspects of tourism were evaluated and the findings produced created a better understanding of domestic tourism. Targeting both tourists and service providers supplied differing perspectives to ensure an unbiased approach to the information gathered. The analysis of the findings not only provides the Namibia Tourism Board with valuable information about domestic tourism but also informs recommendations to help increase domestic tourism in Namibia.

CHAPTER 5: RECOMMENDATIONS AND CONCLUSIONS

5.1 Introduction

The tourism industry must strive to include Namibians and accommodate them through marketing, affordable pricing structures, quality of services provided, affordable and accessible transportation, and a variety of appealing attractions. Without improvements in the domestic tourism industry, Namibians will seek to travel outside the country or not at all. Namibia's tourism market must realize the potential of domestic tourism and make the necessary changes to promote domestic tourism into becoming a leading contributor to the economy of Namibia. A set of recommendations for improvements will now be discussed.

5.2 *Recommendation 1: Encourage Service Providers to Accommodate Domestic Tourists*

One conclusion made based on the analyzed findings was the need for service providers to accommodate domestic tourists. As stated, only 31% of guests at Namibia Tourism Board registered accommodations analyzed are Namibians. This figure needs to be improved to have a sustainable domestic tourism industry. **To encourage Namibians to travel, discounts and reduced pricing plans must be made available.** To produce the most profit from the tourism industry, service providers currently focus marketing and pricing techniques to the foreign market. While prices are affordable to foreign travelers, the cost is much higher than Namibians can afford or are willing to pay. The majority of Namibians spend an average of less than N\$1,500 on travel, accommodations, food and activities each while on holiday. With the current prices of accommodations and other tourism commodities, Namibian travelers are forced to stay with friends and relatives or at other low cost accommodations. This situation does not contribute to the economy because less money is being invested in tourism as prices increase and people are less willing to travel.

First, the realization of the importance and potential benefits of domestic tourism needs to be established. **The recommendation of a widespread campaign to inform service providers of the importance of domestic tourism is the first step towards improving pricing.** The distributed literature should explain the importance of domestic tourism to Namibia and include statistics outlining the benefits of increasing the number of domestic tourist clients. Further research should be

conducted discovering the average prices of tourism establishments throughout the country, as well as the amount Namibians can spend, and be presented to service providers in a comprehensive pricing guide. Currently, businesses do not know the prices of their competitors. By forcing the release this information, the market will become more competitive and prices may be driven down in an attempt to bring in the greatest possible number of guests.

An incentive can also be introduced to motivate service providers to accommodate Namibians; however, this should only be done if there are insignificant improvements in the domestic tourism market as a result of the distributed literature. **One incentive could be a subsidized rate for the levy tax charged by the Namibia Tourism Board in exchange for proof of compliance to a price reduction and marketing campaign.** If companies devise a pricing plan and implement an advertising strategy to market the new price reduction, some levy tax should be waved. To measure the effectiveness of this plan and to ensure validity of its implementation, businesses will need to provide data showing a certain percentage of increase in domestic clients. This will not only convince the Namibia Tourism Board of the success of the program but results could be organized and distributed to non-participating service providers throughout Namibia to further emphasize the importance and benefits of domestic tourism. Paired with successful marketing techniques, the redistributed literature would be helpful to many companies and the domestic tourism industry.

5.3 Recommendation 2: Improve Marketing Strategies

As previously mentioned, successful marketing techniques are critical to the development of the domestic tourism industry. Upon initial review of the literature available to tourists, it was noted that **very little marketing was focused on the domestic tourist.** Almost all brochures and information available at the Namibia Tourism Board and other tourist information centers are geared towards international tourists. Further research conducted through questionnaires and interviews with Namibian travelers supported the observation that the lack of accessibility to information on domestic tourism is a significant problem within the industry. As seen from Figure 4.30 in the previous chapter, many respondents reported that accessibility and types of attractions available need to be improved.

Namibians who have traveled in the past are very proud of their country's attractions. One questionnaire respondent stated, "Namibia is such a gem for those who haven't traveled." This respondent felt that Namibians should travel and discover their own country and that it is important for locals to engage in tourism. Another questionnaire respondent stated, "Tourism awareness is a concern – there are a lot of Namibians that do not understand what tourism is all about. [Education] needs to be done at a national level." Considering these statements, it is apparent that Namibians need to have access to information on the importance of tourism to Namibia's economy, as well as opportunities for them to engage in tourism.

Several interviews with service providers in both the Windhoek and Swakopmund areas revealed that marketing towards domestic tourists is lacking. Most service providers focus their marketing efforts overseas to countries such as Germany and the United Kingdom. This is most commonly done because foreign travelers contribute a larger amount of money and can afford to pay more for services due to international exchange rates, as one service provider discussed during an interview. Based on the analysis of these interviews and data on hotel pricing provided by the Namibia Tourism Board, between 5% - 30% of guests at accommodations in Namibia are domestic travelers. These percentages are at an unfavorable level when compared to those of other countries with successful domestic tourism industries. Approximately 60% of the bed nights sold to visitors in Australia are to domestic tourists. When asked, most Namibian service providers expressed a willingness to accommodate more domestic tourists, which suggests potential for domestic tourist arrivals to increase; however, this requires a more focused marketing effort.

Determining the types of activities in which Namibians would like to participate and the accommodations they would like to utilize was an important step in the process of developing a more appropriate marketing campaign for domestic tourists. This was accomplished through the first objective, with results detailed in the previous chapter. Since the wants and needs have been determined, the next step is to market such attractions and accommodations to domestic travelers. This can be done in the form of a brochure or other simple advertising methods that are easily accessible at places like the Namibia Tourism Board and City of Windhoek information kiosks. A sample brochure was created for Namibian domestic tourists according to the Namibia Tourism Board's pamphlet "Branding Namibia: A Practical

Guide” in order to project a positive image of domestic tourism and retain country branding strategies, as shown in Appendix J. The brochure includes a letter to domestic tourists explaining the importance of tourism to the economy and fun facts about tourism in Namibia, as well as information on accommodations throughout the country that offer discounts or special pricing packages for locals and other free or low cost attractions. It is hoped that the Namibia Tourism Board can utilize the format of the brochure as well as the ideas presented within it in order to create more marketing media promoting affordable attractions that are of interest to Namibians wishing to travel.

Additionally, it is important that **service providers improve their own marketing strategies to focus more on the domestic market.** In the interviews that were conducted with hotel and marketing managers, a common willingness to attract more local people to their establishments was perceived. The leading accommodation in attracting domestic tourists is Namibia Wildlife Resorts. Approximately 22% of their clientele are domestic tourists. Their marketing strategies include ongoing advertising through magazines and attending travel expositions. Making media such as magazines and brochures that are geared towards Namibians more accessible may increase the number of domestic tourists.

Segmentation can be utilized to create marketing efforts that are focused on specific groups of people. Several areas of domestic tourism such as desired attractions and accommodations used were correlated based on age and income. It was seen that Namibians of different age groups and income levels would like to visit different types of attractions and tend to utilize different accommodations. Identifying the appropriate marketing media that will most effectively reach the desired audience can aid in increasing the number of Namibians who travel. Further research will need to be conducted on the types of marketing strategies that most effectively reach the different age groups and income levels. Also, research should include how Namibians currently find out about travel opportunities. This will aid in making those means more readily available to attract more domestic tourists.

Overall, the importance of an appropriate and effective marketing strategy geared towards Namibians cannot be ignored. Marketing has been reported as one of the key factors in helping travel businesses become successful, as discovered through interviews with service providers. Since many service providers are now realizing the importance of the domestic market to the tourism industry in Namibia, they are

realizing the importance of advertising their services to attract this market to their establishments. The marketing manager for Namibia Wildlife Resorts reported that they will soon be implementing a more focused global marketing strategy to advertise their discounted services to Namibians. It is recommended that other service providers take similar initiatives towards marketing their services to the domestic market and encouraging domestic tourists to utilize their establishments. **It is recommended that the Namibia Tourism Board begins a marketing effort geared towards domestic tourists to advertise all types of tourism services and increase the availability of information about domestic tourist attractions.**

5.4 Recommendation 3: Improve Quality of Service

Poor quality of service was a common complaint among domestic travelers. Service is one of the most critical factors in sustaining the tourism industry, as it can determine whether or not tourists will become repeat visitors. Travelers also share experiences with friends and poor service will deter potential tourists from visiting certain establishments in the future.

One questionnaire respondent stated, “Customer service needs to be improved in the general parts of Namibia as this plays an important role to please the tourists.” Many other respondents and interview participants explained that many employees at tourism establishments lack the skills necessary to provide proper service. This may stem from the effects of the apartheid system discussed in the background chapter, and also from the lack of awareness of the importance of tourism. Many Namibians do not understand how tourism benefits the economy and feel resentment towards travelers, especially international visitors. Education can be an important tool in combating the lack of awareness and poor quality of service.

One recommendation to improve training is to **invest in training for staff at accommodations and other service provider establishments**. A standardized base program should be outlined by a government organization to help control the quality of training. Individual companies can then choose to take advantage of the standardized training program. The program would be designed to apply to many aspects of tourism services, particularly at accommodations. The format should be a combination of workbooks and practical experience opportunities. These training programs can be used to improve staff-to-guest relations and the overall guest experience. The program can be modified to meet each individual company’s needs

and may be used as a tool to indicate staff members deserving promotion within the company. An evaluation method must be implemented to determine the effectiveness of the training programs and make necessary adjustments.

The City of Windhoek has already implemented several programs to improve the quality of service in the tourism industry. These programs include the *Teens in Tourism* campaign and the *Black Economic Empowerment* program. The *Teens in Tourism* campaign is geared towards educating grade 12 students on the importance of tourism to the economy. It includes lessons on how to appropriately treat tourists and become involved in the service provider industry. The focus of the *Black Economic Empowerment* program is to provide training to restaurant owners and caterers on proper hygiene, sanitation, and quality standards, and to educate accommodation and establishment owners about service, financing, budgeting, and marketing. The goal is to allow local Namibians to become recognized within the tourism industry, become successful business owners, and improve their quality of service. Continuing these programs and implementing similar programs geared toward accommodation and restaurant owners could benefit the tourism industry and alleviate complaints of poor quality of service, overall increasing the desire of Namibians to travel. Again, it is recommended that questionnaires regarding the quality of service be distributed to visitors to sites before and after the implementation of such programs in order to monitor the success of the training programs.

Many domestic tourists do not feel they receive the same quality of service as foreign travelers. As discussed in the findings, service providers prefer international tourists from a business perspective because they have the potential to provide more money. As one domestic tourist interviewee stated, many service providers view domestic travelers as tourists looking for a huge discount. Therefore, they focus their marketing strategies elsewhere and do not provide the same services to domestic travelers since they are paying less. Service providers need to realize that although domestic tourists may pay less for their services, they are still an important segment of the tourism market and still have the potential to contribute a significant amount of money to the industry. This realization can be accomplished through education. **It is recommended that seminars be held or information be distributed by the Namibia Tourism Board that will inform service providers of the potential contributions of domestic tourists and the importance of providing quality services to Namibians to encourage repeat visitation.**

Overall, improving the quality of service in general, especially towards domestic tourists, is an extremely important aspect for progressing domestic tourism into a more successful and sustainable industry. Without adequate services and friendly staff to encourage travelers to visit establishments, tourists will look elsewhere for travel experiences. Service providers throughout Namibia should evaluate the services currently provided and consider training and educational programs to improve future services provided to their customers.

5.5 Recommendation 4: Improve Accessibility of Transportation

A common complaint from domestic tourists is transportation. **Public transportation in Namibia is often expensive and difficult to access due to scheduling issues.** Schedules for public transportation are often posted incorrectly or changed without notice. Through considering and utilizing recommendations to increase accessibility and encourage usage, the public transportation system can be improved and Namibians may be able to travel more often.

Several topics have been identified within the public transportation system as areas that require improvement: trains and buses. Currently, the train system is not conducive for passenger travel, as it is mostly used for cargo transport. The TransNamib railroad transports passengers, but requires almost a full day of travel to reach relatively close destinations. This service is also expensive. It is recommended that steps be made to improve affordability and ease of travel. Money should be subsidized from the government to aid in these improvements.

Recommendations for the bus system include the development of a public transport bus and a pass system for its use. Several bus companies such as the Intercape Mainliner and Ekonolux currently travel throughout Namibia, but are expensive to use and travel only on specific days or at specific times. Passes should be introduced for a flat monthly or yearly rate. The pass could offer discounts or allow the holder to travel at any time, encouraging the holder to travel more often. Based on data gathered from the questionnaires, many Namibians travel in large group sizes suggesting that the development of a family pass would be beneficial to both tourists and service providers. For example, discounts could be awarded proportional to the number of tickets previously purchased. This would encourage large travel groups to use the public transportation systems and to travel more frequently.

The lack of transportation both throughout Namibia and specifically within the city of Windhoek has affected the ability of Namibians to engage in tourism. For example, the current lack of visitation to sites such as Heroes Acre is partly due to the location requiring extended transportation. Heroes Acre is located approximately twenty minutes outside of the city of Windhoek. Since many Namibians do not own their own car, they must find other means of transportation to the site. Taxis are expensive or are not willing to transport potential visitors to Heroes Acre due to its relatively distant location. As part of a plan to develop a Heritage Trail through the city, the City of Windhoek hopes to create a Hop-On/Hop-Off Bus system. The system would allow for tourists to be dropped off and picked up at various locations throughout the city, including sites such as Heroes Acre. If contracted by the city, the bus would be free. A small fee would be induced if the system was contracted to an outside vendor. The development of the Hop-On/Hop-Off bus would enable tourists to be affordably transported throughout the city, allowing them to experience more local tourist attractions.

The development of a country-wide Drop-Off / Pick-Up bus system similar to the color line bus system in Cape Town, South Africa would aid in transportation between attractions in the main towns and cities of Namibia, such as Windhoek, Swakopmund, and Lüderitz. The Namibia Tourism Board, working with the private sector, should be able to identify the main attractions in towns and cities and develop bus routes highlighting those attractions.

Public transportation is currently a major problem in Namibia. Through improvements in the public transportation system in terms of pricing and accessibility, potential domestic tourists will be able to travel more frequently and with more ease.

5.6 Recommendation 5: Improve the Variety and Accessibility of Attractions throughout Namibia

Findings from the questionnaires and interviews suggested the need for improving the range of attractions offered to Namibians. These comments can be attributed to both the actual physical lack of attractions and a deficiency in marketing the existing attractions towards the target audience of Namibians. As discussed previously, current marketing strategies are focused on the international market. Recommendations made previously in this chapter will begin to address the marketing problems. However, the availability and pricing of attractions remain unaddressed

issues in domestic tourism as there are very few affordable attractions advertised to Namibians. Marketing free or low cost attractions to domestic tourists may help increase local tourism. Examples of free attractions that could benefit from increased local advertising are the Bushman Art Gallery, the Penduka Women's Project, the Katutura Community Arts Center, and many local history and art museums.

The development of nature-based, cultural, and historical attractions that are both affordable and interesting to domestic tourists is essential to improving the tourism industry. By marketing these types of attractions specifically to Namibians, their interest in visiting these local attractions will increase and encourage travel to similar locations throughout Namibia. As discussed in the findings chapter, a significant majority of respondents wish to participate in nature-based attractions. **The Namibia Tourism Board needs to investigate nature-based attractions that are currently underutilized or undeveloped across Namibia and focus on marketing them to Namibians** so that they are encouraged to investigate the beauty and splendor of their own country. Namibia is filled with a variety of landscapes such as the dunes at Sossusvlei, the many species of wildlife at Etosha National Park, and natural phenomena unique to Namibia, such as dinosaur tracks and cave systems, that have many opportunities for further development.

Namibians travel for numerous reasons and findings indicate the desire to partake in differing types of attractions. In addition to nature-based tourism, another type of tourism is cultural. With the development of cultural attractions, Namibians would be able to learn and explore the cultures of Namibia. Over 20 different tribes currently reside in Namibia, each with their own traditions and customs. With the creation of cultural attractions such as museums, accommodations, festivals, and tours of traditional villages, Namibians would be able to experience these different cultures. One example of a current cultural attraction is the Katutura Host Incentive. The City of Windhoek's program includes a stay with a family in a traditional home. The tourists experience the culture of the area as well as home life, food, and customs. It is recommended that a similar program is implemented around the country at various townships and villages. Namibians will be able to travel to these various locations to experience the different cultures of Namibia at an affordable rate. As the homes develop, the possibility exists of establishing small bed and breakfasts or guesthouses. The development of these sites is a good way to improve the economy in these areas,

as domestic tourism brings money not only into the direct accommodations, but also the surrounding area through food and other merchandise purchases.

While cultural tourism celebrates the culture of today, historical attractions remember Namibia's past. Several historical attractions already exist throughout the country and current plans are in place to develop more sites. The City of Windhoek's current development of the Old Location Museum is one such plan. The Old Location Museum will be designed similar to the District 6 Museum of South Africa. It will be used to showcase the culture and history of the Old Location. Other historical sites currently underutilized include Shark Island and other colonial-era concentration camps, as well as Herero War Battlefields. The development of a memorial or a museum at these sites would be beneficial in educating Namibians about their history.

Namibia has potential for all types of tourism to be developed, as discussed in the background chapter. Namibians have expressed interest in all types of attractions. Further research should be conducted on the feasibility of developing such sites to attract domestic tourists.

5.7 Recommendation 6: Conduct Further Research

The final recommendation is to conduct further research on domestic tourism. It is important to understand that due to resource limitations, a small sample size was chosen from a specifically targeted population of middle-class Namibians. The sample used was representative of the desired population, but not of the Namibian population as a whole. This imposes limitations on the data and results collected. Areas for future research include the income demographics of Namibia as a whole, the disposable income of Namibians, the willingness to spend money on tourism, and official rates of accommodations throughout Namibia.

The middle-class is a recent and emerging phenomenon in Namibia. It is currently unknown exactly which income levels classify as "middle-class". It is thought that this "middle-class" of Namibians is the group of people who have enough money to spend on travel and tourism, but may not be able to afford certain activities and accommodations. A widespread study, such as a national census, should be conducted to focus on the income distributions and spending habits of the entire country of Namibia, as well as the disposable income of each income level. Although this will be time consuming and expensive, the data will aid in better understanding

the financial limitations that are preventing the tourism industry from expanding. The data can also be applied to areas other than travel and tourism.

Since there is such disparity between the current prices of accommodations and the amount Namibians are willing to spend, it is important to understand these trends. Currently, little comprehensive information is available on the bed rates of accommodations. Not only will the available information facilitate travel and tourism among Namibians, but if the Namibia Tourism Board were to release an all-inclusive guide stating these rates, prices will presumably decrease due to competition, resulting in increased domestic travel. Understanding the current prices of accommodations in relation to disposable income and amount Namibians are willing to spend on travel and tourism will also aid in determining appropriate pricing structures that will encourage domestic travel.

The research conducted throughout the course of this project was only preliminary. Much more widespread research needs to be done in order to apply these findings to Namibia as a whole. This study aimed to target middle-class Namibians with income levels below N\$150,000. Although Namibians of all income levels and age groups were included in the analysis, the number of people from each category was not equal or representative of the entire Namibian population. These research recommendations are a basis for what still needs to be understood within the tourism industry.

5.8 Conclusion

If the situation with domestic tourism does not change, the market will cease. Currently, service providers are forcing Namibians to spend money outside the country which brings the economy down. As discussed in the findings chapter, Namibians do travel, would like to continue traveling, and enjoy travel in their home country. Domestic tourists must be motivated to participate more actively in Namibian tourism. Major problems arise for domestic tourists: pricing, transportation, and quality of services. From the analyzed data, it was found that tourists are willing to travel but high pricing remains a deterrent. To reduce pricing, service providers must see the benefit of the domestic tourism market. A wide scale distribution of literature and comprehensive data must be made available to service providers throughout Namibia explaining the importance of domestic tourism. Marketing practices must be implemented that focus on the local domestic tourist market rather

than the international domain. Transportation and accommodations need improvement both in quality of services and pricing. Attractions must be developed to appeal to Namibians and should include a reasonable pricing plan. More research must be conducted to further explore domestic tourism in Namibia. Overall, tourism throughout the country needs to be improved. Recommendations discussed previously are a means to begin changes in the domestic tourism market; however, further research and years of improvements are necessary to develop the industry to a sustainable level.

There is a great sense of national pride and love of their country among Namibians. Through making changes to domestic tourism in the next few years, the country can evolve and grow into a greater Namibia: a country belonging to the people.

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Appendix A – Data Collection Methods

A.1 Introduction

Data collection within the tourism industry is necessary for many reasons. A significant amount of money is spent on marketing tourist attractions; therefore it is important to understand the current situation of travel and tourism in terms of travel and expenditure trends so that this can be done appropriately and effectively (Foster, 1999, pg. 4). Researching demographics of potential domestic tourists, their past travel trends, future travel desires, and perceptions of tourism in Namibia through various means may aid in better understanding areas requiring improvement within the tourism industry.

Primary and Secondary Data

Two distinct categories separate and regulate data collection: primary and secondary data. Secondary data consists of existing results from previous research or polls. This information can prove cost efficient and useful as background research or as a supplement to other collected data. Sources of secondary data include government agencies, trade associations, the press, internal records, management and research consultancies, and census data (Seaton and Bennett, 1996, pg. 91). Since little to no research has been done on domestic tourism, secondary data was important to consult for this project.

There are several important considerations for the use of secondary data. One consideration is the relativity of the data. The data may be outdated, thus it is important to carefully apply findings to current research (Goeldner & Ritchie, 2006, Seaton and Bennett, 1996, pg. 92). An example of potentially useful, yet non-current data is information gathered through national census. In the United States of America, census is taken every ten years, collecting data on income, housing, and family size among other categories. This data may be useful when recent to the data collection, but will become outdated over the span of the census period. Credibility must also be considered, which can be assessed through assessing the means of generation. Accuracy and bias, population coverage, and sample selection are also very important (Seaton and Bennett, 1996, pg. 92). Based on these considerations, it is important to supplement secondary data with other sources.

Primary data is gathered through current research. Focus groups, personal interviews, factual information, opinion, and telephone, mail, or interpretive surveys

serve as primary data collection methods. While primary data may be more pertinent to the conducted study, cost and time factor into the plausibility of accomplishing a wide range survey. Secondary data should be examined before resorting to primary data collection methods (Goeldner & Ritchie, 2006).

Both types of data collection are necessary when researching domestic tourism in Namibia. Secondary data can be collected through consulting successful practices in data collection performed by other tourism studies, while primary data can be collected through other methods. The next section discusses accepted approaches to data collection frequently utilized within the tourism industry.

A.2 Accepted Approaches to Data Collection

There are several accepted approaches to data collection. Some methods are more appropriate than others when considering tourism. Since little to no research has been done on domestic tourism in Namibia, quantitative methods such as questionnaires and qualitative methods such as interviews and observation are the most appropriate to establish a basic knowledge of the current situation. These methods are discussed in the following sections.

Quantitative Research Methods

Quantitative research is the most popular research method within the tourism industry. It is also given the most credibility because it pertains to data and numbers that can be statistically analyzed (Decrop, 1999). It serves to establish states between defined variables (Milman, 1993). Examples of quantitative research methods include surveys and questionnaires, rating systems, and censuses. With regards to tourism, questionnaires and surveys are the most common form of quantitative data collection.

Sampling

Surveys are not meant to encompass entire populations. Instead a sample representative of the population is used in order to ensure accuracy (Godfrey and Clarke, 2000, pg. 194). According to Boone (2004, pg 23), the “inescapable principle” of sampling is to remember that the sample group is “only a sample of the general population and measurements made on it are only estimates of the ‘true’ population values.”

There are several steps to properly sample a population. The population must first be defined. A sampling frame, or a list from which the participants will be selected, is established and the number of participants must be decided. The sampling technique should be determined and the final sample selected (Seaton and Bennett, 1996, pg. 95). When the sampling group varies from the general population, the group is considered non-representative. This is the most frequent cause of inaccuracy within surveys and samples (Boone, 2004).

A recurring sampling issue is determining the size of the sample. There is no defined way of determining how the sample should be sized. For example, in the United States of America, many well-known national polls use sample sizes of 1,000 to obtain adequate information in regards to national attitudes and opinions. The sample selected should be from each sector of the population, incorporating individuals of differing heritages and economic backgrounds. Although sample sizes must be large enough to represent the entire population, time and money are factors in determining sample size. Too large of a sample requires extended time for analysis and large expenditures of resources to ensure completion of the study (Godfrey and Clarke, 2000, pg. 194, Scheuren, 2004).

Generally, there are two types of sampling utilized by researchers. Probability sampling, the most common sampling method, is based on selecting a population that will “mathematically represent subgroups of some larger population” (Berg, 2007, pg. 41). A simple random sample is a common type of probability sampling. In simple random sampling, each person in the population must have an equal chance of being selected for participation in the study. Once the population, sampling frame, and sample size have been chosen, a number is assigned to each potential participant and a random numbers table or other random number generator is used to select the participants for the study (Berg, 2007, pg. 42).

Systematic random sampling is also used as a type of probability sampling. To select participants for a study using this method, every n^{th} person is selected from the sampling frame. The interval (n) is determined by dividing the total number of possible participants by the desired sample size. To further ensure randomness, researchers often use a random number generator to choose the number of the participants with which to start counting intervals (Berg, 2007, pg. 42).

Tourism studies conducted at the Anne Frank Museum in Amsterdam implemented systematic sampling. Questionnaires were used to gather data on visitor

perceptions and expectations of the site, as well as motivations for visiting the museum. To ensure diversity, both domestic and international travelers above the age of 15 who spoke English were surveyed at the Anne Frank House. Systematic random sampling was implemented by selecting every n^{th} visitor, resulting in approximately 208 visitors surveyed, of which 57.8% were female and 42.2% were male. This sample also included a variety of geographical locations, age groups, levels of education, and religious affiliations (Biran, 2005, pg. 5).

The last type of probability sampling is stratified random sampling. This is useful when a certain portion of the total population is included in the sample. This is accomplished by segmenting the population into subgroups and selecting independent samples from each. The number of selected participants in each subgroup should correspond with the total percentage of the subgroup within the entire population. For example, if a group represents 20% of the total population, the stratified group in the chosen sample should represent approximately 20% of the sample size. Stratification is only possible when population information and statistics are available to the researchers (Berg, 2007, pg. 42).

At Cape Coast Castle in Ghana, a combination of systematic and stratified sampling was used to collect data on tourist perceptions of site presentation and emotional attachment to the site. The first two visitors entering the attraction separately and belonging to one of the three target groups were chosen to participate in the survey (Austin, 2002, pg. 450). Generally, all three types of probability sampling are effective and accurate representations of the total population if performed correctly.

Non-probability sampling is used most often to collect qualitative data, but can also be used to collect quantitative data. Non-probability sampling is utilized when the study is large scale and cannot conform to the needs of probability sampling, which are often much more restrictive. There are four types of non-probability sampling: convenience, purposive, snowball, and quota sampling.

Convenience sampling utilizes a sample group that is easily accessible. It is often effective at determining useful preliminary data, but can often be biased since samples are not always accurate representations of the desired total population. Therefore, the appropriateness of the chosen convenience sample must be evaluated in terms of the type of information collected (Berg, 2007, pg. 43).

Purposive sampling is a technique used based on researcher expertise regarding a certain group. Researchers select participants who they believe represent the population. This may be done following field investigations performed to determine which groups possess the appropriate characteristics. The primary problem with purposive sampling is that the data collected during the study may not be generalizable over the entire population (Berg, 2007, pg. 44).

Similar to convenience sampling, snowball sampling or chain-referral sampling, is used to target people with specific characteristics. Participants are surveyed and asked to indicate people with the same attributes they possess. Researchers follow-up such studies by surveying the referred participants (Berg, 2007, pg. 44).

The last type of non-probability sampling is quota sampling. To use a quota sample, researchers first determine the subject characteristics they would like to include in the sample, i.e. age, gender, income, or education level. Persons possessing these characteristics are then chosen in pre-determined proportions of the total sample size (Berg, 2007, pgs. 44-45).

Choosing an appropriate sample is important when conducting studies that include large populations. Surveys are an example of such studies. The report now turns to a discussion of methods for conducting surveys.

Surveys and Questionnaires as Tourism Data Collection Methods

Generally, primary data can be collected through long, intensive studies or through relatively simple surveys. The data collected from each study differs greatly depending on the method of distribution, the types of questions used, and the overall design of the questionnaire. The methodology must be determined by the intended use of the information gathered. Quantitative questionnaires and surveys are often written lists of questions with standardized answers. Their purpose is to gather data for statistical analysis. They are useful for collecting data in which an involved, detailed response is not necessary.

Questionnaires can involve two types of questions: open-ended or closed questions. The use of open-ended or closed questions depends on the type of research being collected. Open-ended questions allow the respondent to provide their own answer without being subjected to influences such as multiple-choice answers. Closed questions provide the respondent with several selections from which to choose or rank

their answer. Closed questions are easy to analyze statistically, while open-ended questions leave room for interpretation and are difficult to analyze in a structured way (Godfrey and Clarke, 2000, pg. 196-197).

Michael Yuan (2001) explores the data collection methods employed in a tourism survey conducted in Montana. The purpose of the survey was to determine the affects of survey length, considering the value of response and the validity of the study. In his study, two surveys varying in length were randomly distributed to out-of-state tourists at a rest stop located on a highway known to be the popular method of travel. The tourists were asked to answer questions regarding the length of their stay and their intended destinations. One survey was to be completed over a period of two consecutive days. A second survey was a single-day survey. Both surveys contained similar information. The initial responses from the two surveys varied by 8% (43% and respectively 51%), indicating a potential difference in complexity and time commitment required on the part of the participant. Due to pre-determined rejection standards, fully completed and acceptable surveys were reduced to 30% and 42% respectively. Yuan (2001) suggests that the data collection methods employed in this study supports the idea that the one-day survey produced comparable results to the more intensive two-day survey; however, the lesser commitment required of the single-day survey participants increased the chance of receiving valid, complete data and encouraged more participants to respond. Limiting the length of the survey to include only relevant questions to encourage response is a recommendation supported by many researchers (Seaton and Bennet, 1996, pg. 97, Yuan, 2001). Applying this research result to the situation in Namibia, the ability to conduct useful, shorter surveys will allow the Namibia Tourism Board to quickly gather more information on potential domestic tourists.

According to Seaton and Bennett (1996, pgs. 98-101), there are several other considerations when implementing surveys as data collection methods. Wording and language should be carefully examined. When designing a survey, researchers should avoid leading questions and abstract concepts so that a simple, non-biased, and easily analyzable response can be given. The language should also be simple and understandable, avoiding jargon or slang, increasing the consistency of responses. People who do not understand slang or who have a limited vocabulary may interpret survey questions differently, skewing the results. Personal questions should also be avoided to increase the number of responses received. Participants are often unwilling

to reveal sensitive or personal information, especially if confidentiality is not guaranteed (Godfrey and Clarke, 2000, pgs. 199-202, Seaton and Bennett, 1996, pg. 98).

The design of the questionnaire used for this research project has considered sources of bias such as length, language and wording, ambiguity, and sensitive or overly personal questions. Specific words such as “holiday” and “leave” were supplemented for “vacation” and “personal or sick days” in order to correspond with customary terms. Many closed questions were used to facilitate completion and ensure accuracy. Answer ranges were determined for this same reason. Before distribution, the survey was reviewed by several researchers in order to further eliminate problem areas.

Qualitative Research Methods

Qualitative research has been described as “multi-method in focus, involving an interpretive, naturalistic approach to its subject matter. This means that qualitative researchers study things in their natural setting, attempting to make sense of, or interpret phenomena in terms of the meanings people bring to them. Qualitative research involves the studied use and collection of a variety of empirical materials case study, personal experience, introspective, life history, interview, observational, historical, interaction, and visual texts that describe routine and problematic moments and meanings in individuals' life,” (Riley and Love, 2000, pg. 168). This research method has not been commonly used in the past, but is gaining acceptance as an effective method for data collection within the tourism industry because it provides detailed, open-ended information. Several types of qualitative data collection methods include interviews and subject observation.

Interviews

Personal interviews can be useful for gathering in-depth responses to desired questions. They are both intensive and productive and allow for elaborate detailed responses beyond the systematic, quantitative information gained through methods such as surveys (Lockwood, 1994, pg. 77).

“Typically, the choice to use an interviewing technique rather than a survey questionnaire technique is based on the selected procedure’s ability to provide

maximum opportunity for complete and accurate communication of ideas between the researcher and the respondent...The interview is an especially effective method of collecting information for certain types of research questions and...in understanding the perceptions of participants,” (Berg, 2007, pg. 97).

There are several types of interviews: standardized, semi-standardized, and unstandardized. Each type of interview has its advantages and disadvantages. Standardized interviews incorporate a set of predetermined questions that are asked exactly as written. Generally, no change in order may occur, no clarification is given about the questions or the purpose of the interview, and no questions are added. These traits can limit the types of responses received during the interview. The semi-standardized interview also incorporates a predetermined list of questions, but allows for more freedom to change the order in which the questions are delivered. Clarification can be given and the interviewer may begin to probe deeper into the questions and ask simple follow-up questions. The unstandardized interview provides the interviewer with the freedom to ask a wide variety of questions which are not necessarily predetermined. The interviewer also has the freedom to probe deeper and insert or delete questions from the interview as necessary. Unstandardized interviews are most effective at obtaining accurate and complete responses and were the focus of this project (Berg, 2007, pgs. 92-97, Godfrey and Clarke, 2000, pgs. 187-88).

Berg (2007, pgs. 99-105) explains that there are several characteristics of interviews that depend on the target group. These characteristics include question order, phrasing, level of language, and question wording. It is important to consider the context in which the question will be asked and to whom, in order to correctly interpret the response. Also, interviewer-interviewee relations are important.

“With regard to rapport, which can be defined as the positive feelings that develop between the interviewer and the subject, it should not be understood as meaning there are no boundaries between the interviewer and the subject. The model for the dramaturgical interview should be interpreted as a conversation between two people conversing on one person’s perceptions on the events of daily life...The dramaturgical interview should not be a dialogue, with more or less equal time allocated to each participant, because the whole point is to obtain information from the subject,” (Berg, 2007, pgs. 116-117).

There are several other useful strategies for conducting a successful interview. The researcher should engage the subject and inform him or her of the purpose of the interview to alleviate any uncomfortable feelings. It is essential to encourage the participant that their input is important. The interviewer should be aware of what the participant is saying and act accordingly; the interviewer should react based on the mood of the response and ask follow up questions. Also, the interviewer should be respectful, cordial, and appreciative of the participant (Berg, 2007, pgs. 118-119). These strategies will engage the participant and encourage him or her to provide detailed and accurate responses.

Observation

Observation of behavior is a unique way to collect qualitative data on topics such as tourist reactions and emotions. It can consist of observing facial expressions, a certain type of behavior, or physical or verbal actions (Godfrey and Clarke, 2000, pgs. 188-189). Observation is often performed during focus groups, interviews, and in other settings because non-verbal cues and body language can provide insight into various issues beyond what is being discussed (Ritchie et al. 2005).

A study conducted at Cape Coast Castle in Ghana, a popular heritage tourist attraction, incorporated observation into its data collection procedures. “A non-participant observer accompanied the visitors on the tour of the male slave dungeon at the site with a pre-determined list of what was to be observed...A simple and passive observation, specifically recording actual visitor behaviour, i.e. bodily movements or reactions, facial expressions and verbal expressions, which are universal and therefore easily observed irrespective of cultural background, was recorded,” (Austin, 2002, pg. 450). Observation, in addition to a questionnaire collected at the site, provided a better understanding of the emotional reactions and interpretations of the visitors. Observation is an effective method of data collection because it can be accomplished quickly and generally does not disrupt the subject being observed.

In this study, observation was used while conducting interviews with potential domestic tourists as well as service providers to supplement verbal information gathered with body language, which can often provide insight into underlying opinions and feelings. Since much research surrounding domestic tourism in Namibia regards sensitive social issues, observation was an insightful method of collecting

qualitative data and a key factor to determining the perceptions of both domestic tourists and service providers.

A.3 Data Analysis

Depending on the type of research conducted, several types of analysis can be performed. For example, statistical or factor analysis is most useful for analyzing large quantities of numerical data that may be collected from surveys, questionnaires, or censuses. Qualitative data is much more difficult to interpret because the responses may vary greatly. Methods such as content analysis may be employed in order to interpret such data. It is also important to triangulate data in order to ensure reliability and credibility.

Data Triangulation

Data triangulation is the method of using more than one source to support data and research and to eliminate bias. It is useful to ensure credibility (truthfulness), transferability (applicability to other situations and settings), dependability (consistency and reproducibility), and conformability (neutrality) of the data collected. Data, methodology, and investigation can all be triangulated through different sources. For example, several data triangulation methods include utilizing verbal cues, non-verbal cues, and past research. Bias can be eliminated from methodology by implementing several types of data collection such as observation, interviews, focus groups, and questionnaires. Investigation can be triangulated by having several researchers interpret the same set of data to eliminate bias. It is also important to mention the use of triangulation when discussing methodology for any research proposal to ensure credibility (Berg, 2007, pgs. 5-8 Decrop, 1999).

Content Analysis

“Content analysis is a careful, detailed, systematic examination and interpretation of a particular body of material in an effort to identify patterns, themes, biases, and meanings,” (Berg, 2007, pgs. 303-304). Content analysis is useful for making inferences about data and its context. It can be used to analyze marketing literature as well as data collected through research.

Content analysis is often performed by collecting qualitative data and organizing it into text through the use of field notes or transcripts. Ideas, phrases, or

patterns should be sorted and categorized (Berg, 2007, pg. 306). There are several drawbacks to the use of this method of analysis. Researcher bias is often present, and interpretations and inferences can be swayed to fit the research hypothesis. To alleviate this and increase reliability, investigator triangulation can be applied (Ritchie et al. 2005).

Where data is not concrete, content analysis is useful when analyzing responses gathered during interviews. Trends in opinions and ideas can be analyzed and grouped. This can enable the researchers to find meaningful correlations between different demographics as well as establish a basis for a solution to the research problem.

A.4 Summary

This project required a variety of data collection methods. Considering the limitations of time and resources, appropriate methods were chosen to effectively collect and analyze the data. Questionnaires, interviews, and observation were utilized to collect the intended data as well as triangulate the results. The application of these data collection techniques was explained further in the methodology chapter.

Appendix B – Domestic Tourism Questionnaire for Employees

Definition of Domestic Tourism: Any travel within one's home country. This can include visiting attractions such as museums, national landmarks, natural phenomena, cultural experiences, etc.

Please fill out the following questions as specifically and as thoroughly as possible. Please return questionnaires 9 a.m. on March 23rd to your Human Resources Department. Thank you!

1. **How much holiday time or leave do you receive per year? Please circle one.**
 - a. No holiday time
 - b. 1 week per year
 - c. 2 weeks per year
 - d. 3+ weeks per year
2. **When do you take your holiday? Please circle one.**
 - a. January-March
 - b. April-June
 - c. July-September
 - d. October-December
3. **Do you normally travel during your holiday? Please circle one.**
 - a. Yes
 - b. No

If Yes:

1. **Where do you travel? Please include specific locations.**
2. **What is the purpose of your travel? Please circle one.**
 - a. To visit family
 - b. For leisure
 - c. For business
 - d. Other, explain
3. **How many people travel with you and who?**
4. **How do you travel? Please circle one.**
 - a. Air
 - b. Bus
 - c. Car
 - d. Other, specify.
5. **How much money do you typically spend while on holiday? Please fill in each category.**
 - a. Travel:
 - b. Accommodations:
 - c. Food:
 - d. Activities:

If No:

1. **Why don't you travel? Please circle one.**
 - a. Too expensive
 - b. No desire to travel
 - c. No time to travel
 - d. Other. Please explain.
2. **Would you like to travel? If yes, where? Please circle one.**
 - a. Namibia
 - b. Southern Africa
 - c. Other African countries
 - d. Overseas

3. If in Namibia, where? Please explain.

For All:

- 1. For leisure/pleasure travel, would you rather travel within Namibia or outside of the country? Why?**

- 2. What types of attractions would you like to visit? Please rank preferences (1-low, 4-high).**
 - Historical sites (i.e. museum, monument)
 - Cultural attractions (i.e. art, festivals, township tours)
 - Nature-based attractions (i.e. wildlife, hiking)
 - Other attractions. Please explain.

- 3. Please circle one. Do you think tourism in Namibia is...**

a. Too expensive	b. Reasonably priced
c. Definitely affordable	d. Other. Please explain.

- 4. What is your average household income? Please circle one.**

a. Under 100,000\$N	b. 100,000\$N-200,000\$N
c. 200,000\$N-350,000\$N	d. 350,000\$N-700,000\$N
e. Above 700,000\$N	

- 5. How much are you willing to spend per person on tourism in Namibia? Please circle one.**

a. Under 500\$N	b. 500\$N-1000\$N
c. 1000\$N-5000\$N	d. 5000\$N-10,000\$N
e. Above 10,000\$N	

- 6. What suggestions would you like to make regarding traveling in Namibia?**

- 7. What areas of tourism would you like to see improved? Please circle one.**

a. Transportation	b. Pricing
c. Accommodations	d. Accessibility
e. Types of Attractions Available	f. Other. Please explain.

Other Comments:

Thank you for your time and participation!

Appendix C - Domestic Tourism Sample Questionnaire for Polytechnic Students and for Middle-class Workers, V. 2

Definition of Domestic Tourism: Any travel or holiday within one's home country outside one's usual working/living area. This can include but is not limited to: visiting attractions such as museums, national landmarks, natural phenomena, cultural experiences, and also spending holiday in areas such as Swakopmund, Etosha National Park, etc.

Please fill out the following questions as specifically and as thoroughly as possible. Please return questionnaires in paper form to Mr. Simon Muinjo or electronically by email to travelnamibia07@wpi.edu by Monday, April 2 at 17h00. Thank you!

8. What is your age?

- a. Under 25 years b. 25-35 years c. 36-45 years
d. 46-55 years e. 56-65 years f. 65 years or above

9. How many members are in your family and what are their ages?

10. Where are you from (city, country)?

11. When does your family take leave? Please circle all that apply.

Jan Feb Mar Apr May June
July Aug Sept Oct Nov Dec

12. How many days of leave are you entitled to per year?

13. Do you and your family normally take holiday during this leave? Please circle one.

- a. Yes b. No

If Yes:

6. How many days of this leave time do you use for holiday?

7. Do you take holiday during weekends?

- a. Yes b. No

8. How many weekends per year do you take holiday?

9. Where do you take holiday? Please include specific locations.

Weekend holiday: Leave holiday:

10. What is the main purpose of your holiday? Please circle one.

- a. To visit family b. For leisure c. For business
d. Other, explain

11. How many people take holiday with you and who?

17. What is your average household income? Please circle one.

- a. Under N\$100, 000
- b. N\$100,000- N\$150,000
- c. N\$150,000- N\$200,000
- d. N\$200,000- N\$250,000
- e. N\$250,000- N\$350,000
- f. Above N\$350,000

18. How much is your family willing to spend per person, per day on holiday in Namibia? Please circle one.

- a. Under N\$500
- b. N\$500- N\$1000
- c. N\$1000- N\$5000
- d. N\$5000- N\$10,000
- e. Above N\$10,000

19. What areas of tourism would you like to see improved? Please circle all that apply.

- a. Transportation
- b. Pricing
- c. Accommodations
- d. Accessibility
- e. Types of Attractions Available
- f. Other. Please explain.

Other Comments:

Thank you for your time and participation!

Appendix D – Questionnaire Reminder Cover Letter

Namibia Tourism Board – Head Office
Shop 22 Sanlam Building
Cnr Fidel Castro & Werner List Sts
Private Bag 13244
Windhoek
Republic of Namibia

Enquiries: Ms M. Awala/Ms. S. Swiegers

Tel: 061- 290 6033/32 Fax: 061- 254848

Email: researchmarta@namibiatourism.com.na
travelnamibia07@wpi.edu

27 March 2007

Employees,

Our names are Lindsey Sturgis, Jennifer Moseley, and Melissa Wheeler. We are students from Worcester Polytechnic Institute in Massachusetts, USA. We are here in Namibia working with the Namibia Tourism Board on a project investigating domestic tourism.

You may be aware that limited information exists about the tourism and travel behaviour of Namibians within Namibia. It is important that for a healthy tourism country, domestic tourism should form a strong pillar of the total revenue generated by the sector. Currently, the domestic tourism industry in Namibia is very small. Many Namibians have complained that travelling within Namibia is too expensive. It is hoped that by fulfilling the following objectives, the willingness of service providers to create a more appropriate pricing plan for locals can be assessed and that a plan may be implemented. It is also important to understand the wants and needs of Namibians regarding travel so that domestic tourism can increase, improving the satisfaction among Namibians as well as the economy.

The main objectives of the research project are to:

1. Understand the travel behaviour of Namibians (how many trips per year, how long do they stay, where do they go, what do they do?)
2. Obtain information about what Namibians want to do and/or where they want to go when engaging into travel and tourism.
3. Acquire perceptions of Namibians about price and service expectations.
4. Acquire perceptions of service providers toward Namibians as tourists.
5. Inform strategy of NTB in how to promote and encourage domestic tourism.

To collect this information, we have distributed a brief questionnaire to your company within the last 2 weeks regarding your past travel and your thoughts on travelling in Namibia. We can assure you that all information will be treated as highly confidential.

We have only received a few responses. It is very important that as many surveys as possible be returned. The analysis of this data could be very valuable and beneficial to you and to Namibia. Your kind assistance in this regard will be highly appreciated.

Sincerely,

Lindsey Sturgis, Jennifer Moseley, Melissa Wheeler, and the Namibia Tourism Board

Appendix E –Service Provider Interview Questions

1. What types of services do you offer? What are the costs of your services?
2. Do you feel these are within a reasonable range for domestic tourists?
3. Who usually takes advantage of your services?
4. Do you have a preference between domestic or foreign tourists?
5. Do you have a guest book or any other means to identify your usual customers?
6. When is the busiest season for you?
7. Do you have an off-season?
8. Do you have a pricing structure to accommodate domestic tourists?
9. IF NO: Would you be willing to implement one?
10. IF YES: What would that entail? (specific price ranges/discounts)
11. Who do you try to attract to your business and why?
12. How do you do this and why?
13. Do you have any way to measure the success of your marketing strategy?
14. What is the main draw to your company? (motto/logo)
15. What image do you try to project for your services?
16. What methods do you think have helped you become a successful business?
 - a. Marketing
 - b. Branding
 - c. Hiring local guides
 - d. Location
 - e. Pricing
 - f. Other

Appendix F – Service Provider Interview Summaries

Accommodation A

- 1. Who usually takes advantage of your services?**
Mostly international tourists from Europe and South Africa. Only about 8% of the clients are Domestic Tourists.
- 2. Do you have a guest book or any other means to identify your usual customers?**
Clients enter the location into a computer system
- 3. When is the busiest season for you?**
Usually the busiest season is Mid July to mid November; but March is the busiest this year.
- 4. Do you have an off-season?**
June is the worst month for us.
- 5. Do you have a pricing structure to accommodate domestic tourists?**
No, we only have some weekend specials.
- 6. Would you be willing to implement one?**
No, we are willing to do only the specials.
- 7. Who do you try to attract to your business and why?**
We try to attract mostly International people, from Germany, France, UK, Italy, Far East, Europe, US
- 8. How do you do this and why?**
We have agents in those locations.
- 9. Do you have any way to measure the success of your marketing strategy?**
We measure the number of tourists increasing for previous years, for example, UK tourists increased by 25% since last year.
- 10. What is the main draw to your company? (motto/logo)**
We are part of **** hotels. Our logo is online. We also advertise the “big five”.
- 11. What image do you try to project for your services?**
We try to project good services and nice place.
- 12. What methods do you think have helped you become a successful business?**
Marketing
Hiring local guides – about 98% are locals

Accommodation B

1. **What types of services do you offer? What are the costs of your services?**
Our services are hotels. We have 8 in Namibia and others in Africa. The prices range, but the average is about N\$460 pp/night.
2. **Do you feel these are within a reasonable range for domestic tourists?**
Yes, considering the services of 3 and 4 star hotels.
3. **Who usually takes advantage of your services?**
Foreign tourists, usually from South Africa and the rest of Africa.
4. **Do you have a guest book or any other means to identify your usual customers?**
We use a computer system to enter the information, which is checked every month.
5. **When is the busiest season for you?**
Usually late July to November.
6. **Do you have an off-season?**
June and July are slower.
7. **Do you have a pricing structure to accommodate domestic tourists?**
Yes, we have a structure for Namibians. We follow the American BAR system.
8. **What does that entail? (specific price ranges/discounts)**
No specific percentage price reductions are given; it varies based on the hotel.
9. **How do you feel about domestic tourists?**
Every customer is welcome.
10. **How do you perceive domestic tourists?**
They expect a lower rate for the services. There is a lower rate during the seasons of December and Easter.
11. **How do you market to your target audience and why?**
We market through the **** hotel group. We have GSA's in different countries. We are the largest hotel chain in Africa.
12. **Do you have any way to measure the success of your marketing strategy?**
The hotels are part of a brand and people know what services to expect.
13. **What is the main draw to your company? (motto/logo)**
The head office in Cape Town decides the brand; there is no motto or logo, just a brand.
14. **What methods do you think have helped you become a successful business?**
Hiring local guides – in Namibia, all GMs are Namibians except for 1.
Service

Comments – Namibia needs to create a culture of domestic tourism. Most people go to the low end of the market and are used to self catering facilities. We need to inform them of and instill quality services.

Accommodation C

1. **What are the costs of your services?**
Varies, around N\$400
2. **Do you feel these are within a reasonable range for domestic tourists?**
Yes, with the 50% discount
3. **Who usually takes advantage of your services?**
More international tourists than domestic tourists
4. **When is the busiest season for you?**
July to late September
5. **Do you have an off-season?**
June
6. **Do you have a pricing structure to accommodate domestic tourists?**
50% off accommodations, all year round
7. **Who do you try to attract to your business?**
All tourists, market mainly to international tourists
8. **How do you do this?**
Agents/brochures/internet
9. **Do you have any way to measure the success of your marketing strategy?**
Keep track of beds sold
10. **What is the main draw to your company? (motto/logo)**
**** is a brand and are located throughout Namibia which makes it easy to travel around while still staying with the same accommodation company
11. **What image do you try to project for your services?**
Quality of service
12. **What methods do you think have helped you become a successful business?**
Hiring local guides – yes they hire most of their staff as Namibians
Location – good locations across Namibia
Pricing – good price for the services provided
Other - quality of service
13. **Comments**
They feel that Namibians should be able to travel in their own county, so they try to meet those needs. Coming from a successful Namibian, the interviewee realizes the prices of the market and knows that they drive away customers. Unfortunately that is the way the industry works. When asked about travel habits of the interviewee, the reply was camping.

Accommodation D

1) What types of services do you offer?

The hotel chain has 6 hotels and lodges of different size and standards at very good locations. We are represented on the coast, in Windhoek both in the city and just outside for conferences/outdoor activities, in the North (the Etosha lodge is the biggest with 106 rooms), and in the Caprivi region which is a very attractive tourism destination. We have no representation in the south at this time.

2) Who usually takes advantage of your services?

We mostly cater for nationals and internationals (UK, Germany, and Italy). Approximately 5% of our guests are Namibians, and 70% are from outside of Africa.

3) How do you identify your usual guests?

We use a central reservation system for all guest bookings, which is called "Fidelio". We are able to log as much info as possible on guests (DOB, region, gender). We also have a guest book for visitors to write comments/complaints. Our system is interlinked so that we can keep track of regular guests and give more personal treatment to them.

4) When are your busiest seasons? Do you have an off-season?

The low season is from December to June, while the high season is from July to November for overseas travelers. However, there has been a pretty equal flow over the last few years with at least 50% occupancy or higher at all times.

5) Do you have a pricing plan to accommodate domestic tourists?

Tourism has been increasing in past years and we adjust our prices accordingly by giving discounts in low season, during which are flexible to attract unusual guests. We provide Namibian specials up to 50% discounts, as well as weekend and family specials to attract more locals. We also have a standard special to attract guests from South Africa. We work closely with NTB and air Namibia to create packages

We believe that a lower price at a higher volume is equal to a high price at a low volume, so we are willing to give these discounts.

6) Do you prefer domestic tourists or international tourists?

We cannot differentiate, a guest is a guest. But you can yield much more from internationals. The Namibian population cannot afford the accommodation rates, and if they can, it is very discounted. We also must consider meals and drinks which cost a lot of money. Everyone is welcome at our establishments, but from business perspective, internationals are preferred.

7) How do you market and who do you market to?

We market via local agents in Namibia and local tour operators. We also have agreements with wholesalers in Germany. We have our own sales agent in South Africa and Germany who is an "employee" who markets through agreed plan of action. Internal sales and marketing is done through international trade fairs, attending the ITB in Germany and UK, through the NTB, and the UK-Namibian network. We often do 2 days of 1-on-1 meetings with UK tour operators, attend the WTM in UK, and participate in road shows. We also utilize our website and brochures.

8) Do you have a specific brand, motto, or logo for your company?

"Namibian hospitality at its Best"

9) What strategies do you think have helped you to become a successful business?

Our strategic advantage is a good location which offers a large variety in terms of experience. Approximately 90% of our employees are Namibian. Special positions are hired outside internationals because Namibians lack good tourism skills. We must look outside. There is very good education in Zimbabwe for tourism.

10) What other comments do you have about domestic tourism?

Discounts are successful to an extent. We need to give new opportunities to Namibians to experience Namibia/hotels. It is important for them to experience the same things as others so that they can be ambassadors to promote Namibia to outside internationals. Namibians need to see Namibia because everyone will benefit. Namibia has great potential as a destination because tourism is fast growing. But we need to work together to take further. We have seen a big increase in arrivals in the past 2 years. We believe that 10\$ for a room is better than an empty room because it covers cost even though we make no profit. Therefore, we are willing to work to accommodate more travelers.

Accommodation E

- 1. What types of services do you offer? What are the costs of these services?**

We specialize in private protected areas/parks with lodges and camping sites in the middle market. The average costs are \$500 per night for a B&B.
- 2. Do you feel these are within a reasonable range for domestic tourists?**

We offer a **** card for 50% reduction for Namibians. These prices are reasonable but not viable for business. We can't always fit everyone's needs.
- 3. Who usually takes advantage of your services?**

Approximately 5% of our clients are domestic, and 70% are German.
- 4. When is the busiest season for you?**

The domestic season is the months of April and December around Christmas. The busiest foreign travel months are July through Mid November.
- 5. Do you have a pricing structure to accommodate domestic tourists?**

Yes, the card gives 50% reduction on accommodations, and 25% on meals, year round for domestic tourists.
- 6. How do you feel about domestic tourists?**

We have no preference between domestic tourist and international tourists.
- 7. Who do you try to attract to your business and why?**

About 80% of our marketing is done through Namibian in bound operators. Approximately 5% of our clients are walk-ins. The internet is used but is still very weak, and most people go through agents for security reasons.
- 8. Would you like more domestic tourists to take advantage of your services?**

Yes, we would like to see Namibians from both advantaged and disadvantaged groups, but culturally Namibians can't and don't travel.
- 9. How do you market to your target audience and why?**

We market the discount card and a campaign for Namibians.
- 10. Do you have any way to measure the success of your marketing strategy?**

This is very difficult, so we track just increases or decreases in numbers. Especially since 80% of the bookings and marketing done through operators with commission structures, it is hard to track.
- 11. What is the main draw to your company (motto/logo)?**

We have a PR person handles this and works with agencies.
- 12. What image do you try to project for your services?**

Our main product is ****. We are middle market price wise, and specialize in environment and protected areas.
- 13. What methods do you think have helped you become a successful business?**

Our location is very important. One must be very critical of location, and should be close to Namibian attractions i.e. Sossusvlei, FRC, Dunes, and Wild Horses. We also use local guides. We have around 300 employees, only 1 of which is international. Companies must also have a long term aim. We can't rely on quick returns. We must look at capital growth, at least 10 years in advance. We also have friendly staff. Because of the old apartheid system, we must invest in training. We have empowerment/uplifting program, where 10% of the salary spent on training to improve service.

14. Other comments on Domestic Tourism:

Domestic Tourism has a long way to go. Currently, mostly German speaking advantaged groups participate. People want different type of traveling. Most internationals want to go camping, and don't want to visit lodges or nature. A lot of elderly people stay in lodge if affordable, but the black population in domestic tourism is totally new ground. We need more research to understand their needs. I have a feeling that they would like to stay in 5 star upper class accommodations, but there are very few in our campaign. Black Namibians want more luxury than other travelers who want simplicity.

Domestic Tourism is very expensive even in the mid-market. I wouldn't stay in my own lodges because even with 50% discounts, it is still impossible. A lot of salary is spent for 1 stay at a lodge.

Perceptions of Namibians are that tourism is just about money and it is costly to get into the industry. There is some hostility so we want to change the perception to affordability

Marketing is just starting to reach Namibians. They are happy to see something happening for them. The European speaking Namibians are even beginning to channel their European friends to travel here in Namibia.

Average commission is 25-30% to operators which is much more expensive. It is cheaper if domestic tourisms come directly, and we can afford to give bigger discounts.

Accommodation F

1. What types of services do you offer?

We are separate from the parks. We specialize in resorts and accommodations. We also do added value services such as restaurants, shops, and swimming pools, game drives, and tours. Each resort offers a different product as well, such as parks, wildlife, and scenery.

2. What are the costs of your services?

We are on the verge of changing our prices, but they range from N\$100 p.p. for camping to N\$1000 p.p. for resorts.

3. Who usually takes advantage of your services?

Approximately 22% are Namibians. The rest are South Africans and other internationals.

4. Do you feel that these prices are within a reasonable range for domestic tourists?

We look at the market mix. Etosha resorts cover 3 segments. Okakuejo is in the upper range but still affordable, then Numatoni, and Halali is low. Everyone has access, but may not be able to afford all the resorts. We feel that they are within a reasonable range.

5. Why did you decide to raise prices?

We used to use unit rates but are switching over to per person charges. We are also doing redevelopment and adding value and comfort. The new prices include an increased guest experience, and the new prices are built in to cover investments.

6. What are your new prices going to be after renovations are completed?

They are not yet released, but will be provided to the NTB. They will be approximately N\$400 p.p.

7. Do you have a pricing structure to accommodate domestic tourists?

Yes, Namibians receive 25% off on accommodations throughout the year. During the low season, we further reduce prices to make it more affordable. The season is changing, and the market message is changing, however. May to November is the high season, while December to April is the low season.

8. Would you be willing to implement a better one?

Yes. We will be monitoring the reactions to the new pricing structures and adjust prices accordingly. We don't want to lose the domestic market.

9. How do you feel about domestic tourists?

They are an important part of the market.

10. Who do you try to attract to your business and why?

We have international marketing strategies, but domestically, we travel to exhibitions, shows, and travel expos. We do ongoing marketing. This year the focus of the marketing will be the new value of redeveloped resorts. We use magazines selected based on the intended message.

11. Have you tried marketing to domestic tourists?

Yes. The global strategy this year is to do a more focused marketing approach. We want domestic tourists to know that off-peak pricing is offered. We have to be careful this year, however, not to market new products before they are ready.

12. Do you have any way to measure the success of your marketing strategy?

Yes. We look at arrival statistics and check against previous periods. Patterns of change compared to last year can be compared. We have

exceeded last year's UK market as seen through looking at the reservation system.

13. What is the main draw to your company (motto/logo)?

We will be releasing the new logo in 5 days.

14. Who is this motto/logo targeted to appeal to?

Everyone.

15. What image do you try to project for your services?

We are still developing values.

16. What methods do you think have helped you become a successful business?

Our marketing is very important. We are "well connected to best and biggest tour operators in the world." Location is also important. Etosha wildlife attracts many people and gives us a competitive advantage. Service and human touch are also important. We are not there yet, but are working towards hiring qualified employees. Private sector employees are hired, and programs for training are implemented if we cannot hire from inside. We invested over N\$1 million last year for training. We first look inside to hire, then outside for resort level employees. For promotional level, we look inside first.

17. What other comments about tourism in Namibia do you have?

Namibia is labeled as expensive. The country needs a national strategy involving the entire chain. At a national level, tourism is still unaffordable and different prices are offered to different people based on where they come from. This is a definite "cloud".

18. Where do you see domestic tourism in the next 5/10 years?

We need to respond positively as players in the industry and give priority to domestic tourists not just in the low season. The industry will be improving over the next few years as domestic tourism has increased in the past few years.

19. Where do you see NWR in the next 5/10 years?

We will be leading in the domestic market. We are leading now because we know what domestic tourism stands for. We have some resorts that cater just to domestic tourists.

20. Other Comments?

We need to invest more in the US market. However, we don't want to market Namibia as a "must market". We want to keep it special and exclusive.

Activity Service Provider A

1. **What types of services do you offer? What are the costs of your services?**
See Attachment in Jen's Email
2. **Who usually takes advantage of your services?**
Foreign tourists from South Africa & Overseas because we market to them.
3. **Do you have a guest book or any other means to identify your usual customers?**
Yes
4. **When is the busiest season for you?**
The busiest months are June/July/August/ Dec/Jan.
5. **Do you have an off-season?**
The months of Feb/March October/November are less busy.
6. **Do you have a pricing structure to accommodate domestic tourists?**
No. We have one price for all.
7. **IF NO: Would you be willing to implement one?**
No, not at the moment.
8. **IF YES: What would that entail? (specific price ranges/discounts)**
We are looking into doing a pricing plan for Domestic Tourists for the 2008 Off Season which will be +- 10%.
9. **Who do you try to attract to your business and why?**
Foreign tourists.
10. **How do you do this and why?**
We market through marketing to agents. We also do advertising through Newspapers & Magazine in South Africa and magazines overseas.
11. **Do you have any way to measure the success of your marketing strategy?**
Yes, the marketing agents track improvements in the market
12. **What methods do you think have helped you become a successful business?**
We are environmentally friendly because we go by the rules of Namibia. We work with MET and advertise this fact. We also hire local guides to show foreigners around.

Restaurant A

1. **What types of services do you offer? What are the costs of your services?**
It is hard to specify exactly. Our meals range from \$30-\$120.
2. **Who usually takes advantage of your services?**
Both foreign and domestic tourists.
3. **Do you have a guest book or any other means to identify your usual customers?**
We track our customers through a computer system.
4. **When is the busiest season for you?**
December is the busiest month.
5. **Do you have an off-season?**
February.
6. **Who do you try to attract to your business and why?**
Anyone. "A customer is a customer".
7. **What is the main draw to your company? (motto/logo)**
No specific motto, but we're the best at what we do.
8. **What methods do you think have helped you become a successful business?**
We like what we do and it shows. All of our employees are local Namibians.

Service Provider A

1. **What types of services do you offer? What are the costs of your services?**
Tourist Information Center that caters to international tourists
2. **Who usually takes advantage of your services?**
International Guests
3. **Do you have a preference between domestic or foreign tourists?**
No
4. **Do you have a guest book or any other means to identify your usual customers?**
Yes
5. **When is the busiest season for you?**
July through November
6. **Do you have an off-season?**
Yes, June
7. **Who do you try to attract to your business and why?**
We are just a tourist information center
8. **How do you do this and why?**
Website, Brochure that outsource other businesses
9. **What is the main draw to your company? (motto/logo)**
We are an information center
10. **What image do you try to project for your services?**
Information
11. **What methods do you think have helped you become a successful business?**
 - g. Marketing
 - h. Branding
 - i. Hiring local guides – mostly locals that work there
 - j. Location
 - k. Pricing
 - l. Other

Appendix G – Domestic Tourist Interview Summaries

Domestic Tourist Interview 1

- 1. Where do you live?**
I am from the east, but live in Windhoek.
- 2. How much holiday time are you allowed per year?**
I get about 17 days.
- 3. How much of that time do you use for travel?**
I use about 70% for travel.
- 4. Do you travel on weekends, how often?**
Yes, I take weekend trips.
- 5. Where do you travel to?**
I usually go to Swakopmund, the coast, or Sossusvlei.
- 6. Why? (VFR, leisure, other)**
Usually I travel for VFR, and for leisure.
- 7. How do you travel there? (car, bus, minibus, air)**
I usually go by car.
- 8. What do you do there? (accommodations, activities)**
I like to go sightseeing and camping. The dunes always change at Sossusvlei, so it is different every time I go.
- 9. How much do those services usually cost?**
Camping equipment is rented at low rates and a good cost. I love camping, but I also do it because it's cheaper.
- 10. What would you like to see changed in terms of pricing?**
I would like to see accommodation pricing be changed.
- 11. Do you take advantage of domestic tourist specials? Please explain.**
Not very much. Those that you can find are fixed for groups, not really for NTB employees.
- 12. How do you feel about the places you go?**
 - a. Is there a comfortable atmosphere? Mostly**
 - b. Do you feel out of place as a Namibian?**
Yes, people think you are either from the government or coming to get a huge discount. They screen you to make sure you can pay.
 - c. Do you feel you get the same quality of services as foreign tourists?**
Not always. At BI Aribush travel, I booked a trip for myself and friends from Norway. The Service Provider thought it was an international group and was happy to accommodate our request for traditional cuisine, but when we arrived and I paid and he saw I was Namibian, the services were cut back and plans were rearranged. I had to show them my NTB card and then they tried to be nice and provided the services originally guaranteed.
- 13. Any other comments on what you would like to see different the next time you visit these places?**
We need to give back to the local people. They don't understand that all kinds of tourists exit. They need to have local Namibians spending money in tourism.
- 14. What would you like to see changed in domestic tourism across Namibia?**
I want to see less money spent on VFR. People fill up their gas tank and buy food and drive 800 KM to visit family. They could stay closer to the city and spend less money to see the sites.

Domestic Tourist Interview 2

1. Where do you live?

I am from Swakopmund, residing in Windhoek.

2. How much holiday time are you allowed per year?

I am allowed about 24 leave days.

3. How much of that time do you use for travel?

I use about 40% for travel.

4. Do you travel on weekends, how often?

I travel on some weekends, probably about every third month.

5. Where do you travel to?

I travel to the coast or to the North.

6. Why? (VFR, leisure, other)

I have family at both locations.

7. How do you travel there? (car, bus, minibus, air)

I use the town hoppers or the bus.

8. What do you do there? (accommodations, activities)

I usually stay with relatives mostly. When I go to the coast I go dune riding or visit the Swakopmund museum, or go on dolphin cruises. There is not much to do in the North.

9. How much do those services usually cost?

You have to negotiate otherwise you can't afford them.

10. Do you think these prices are reasonable, why?

No. They are too expensive.

11. Do you take advantage of domestic tourist specials? Please explain.

Places hardly give them and the discounts aren't enough. We still can't afford things.

12. How do you feel about the places you go?

d. Is there a comfortable atmosphere? Yes

e. Do you feel you get the same quality of services as foreign tourists?

I can't really compare. I don't know how internationals are treated. I am satisfied with some services I have received, but not all. Some people don't respect clients and forget that they are bringing money to the company, but at some locations you feel at home.

13. Any other comments on what you would like to see different the next time you visit these places?

We work in the tourism industry but hardly travel in it because of the cost.

14. What would you like to see changed in domestic tourism across Namibia?

Service providers should do surveys to better understand what people can afford. They discount 10% but we need about 30-40% ATLEAST. I can only afford to travel every 5 months or so.

15. Where would you like to go in the future?

I've never been to the north east and would love to go if time and money permits. I'd like to go near the Kunene region too. I visit the north around Christmas time, near the Ovambo region.

Domestic Tourist Interview 3

1. Where do you live?

I live in Khomasdal.

2. How much holiday time are you allowed per year?

According to labor laws, we should get 24, but I get 14 days approximately.

3. How much of that time do you use for travel?

Not much, I usually rest and stay home. Sometimes I go to Swakopmund or South Africa to visit my mom's family.

4. Do you travel on weekends, how often?

Yes, within the country. I go either to Windhoek or Swakopmund.

5. Where do you travel to?

I travel to NWR, Daan Villjoen, or Cross-Barren just for the day.

6. Why? (VFR, leisure, other)

I travel for leisure in Windhoek, and for VFR in South Africa.

7. How do you travel there? (car, bus, minibus, air)

I travel by car within Namibia, and use the Intercape to South Africa.

8. What do you do there? (accommodations, activities)

I use Bungaloes in Swakopmund or self-catering facilities. They are much cheaper and you can buy your own food, etc.

9. How much do those services usually cost?

The self-catering facilities cost about \$N300, which is discounted from \$N500.

10. Do you think these prices are reasonable, why?

The discounted price is very reasonable.

11. What would you like to see changed in terms of pricing?

I would like to see more discounts for Namibians, and more emphasis should be put on Namibians are also tourists. General perceptions of Namibians are that only international travelers are tourists.

Gondwana has a special where Namibians can pay \$N100 per year to use the resorts at any time. This is good for advertising and creating awareness. It is important because we are the ones that should be the basis for tourism, and should set the foundation that we are the tourists and can contribute to tourism industry, not just foreigners. Cape Town does a good job of involving domestic tourists into the tourism industry.

12. Do you take advantage of domestic tourist specials? Please explain. Yes

13. Do you feel you get the same quality of services as foreign tourists?

At Waterberg, we are definitely treated differently than foreign tourists.

Employees at lodges need to be aware of tourism and have to be skilled to understand that all tourists bring in money. It is unfair for foreigners to be charged more than domestic tourists.

14. Any other comments on what you would like to see different the next time you visit these places?

NWR needs to upgrade their services, especially Gross-Barmen hot springs. They are still like in the apartheid era. They have old chairs and dirty facilities. The government should be more involved in upgrading and skills training. We also need more facilities for children other than swimming pools. Tourism should be more creative, such as implementing child care, playgrounds, or perhaps a gym facilities or a spa. There are a lot in South Africa, why can't we also create those? The ones here are too

expensive. It's for people that come from overseas that can afford those types of amenities. We need to create more relaxation activities.

15. What would you like to see changed in domestic tourism across Namibia?

We must involve more Namibians. There are Community Based tourism organizations, but we don't hear much about that. Maybe because of finances they are not known. If they start building something in conservancy areas, they shouldn't just involve foreign investors, but the community too. We must also conserve these places because we love that in our country.

Domestic Tourist Interview 4

- 1. What do you do?**
I am a Travel liaison for the NTB.
- 2. Where do you live?**
I live in Windhoek.
- 3. How much holiday time are you allowed per year?**
I am allowed 12 days.
- 4. Do you use much of that time for travel?**
Yes
- 5. Do you travel on weekends, how often?**
Yes, 2 weekends per month.
- 6. Where do you travel to?**
I travel mostly to farms. I have been everywhere in Namibia.
- 7. Why? (VFR, leisure, other?)**
I travel for VFR, leisure, and business.
- 8. How do you travel there? (car, bus, minibus, air)**
I travel by car, you have to travel by car, and you can't use public transportation.
- 9. What do you do there? (accommodations, activities)**
I stay with family.
- 10. Do you think these prices for tourism in Namibia are reasonable, why?**
There are many places that are affordable for Namibians. National parks are expensive.
- 11. What would you like to see changed in terms of pricing?**
National parks are expensive, they need to fix the low level accommodations or create daily packages. Many are geared to international tourists, and don't work for one day stay. Camping prices are expensive too.
- 12. How do you feel about the places you go? - Fine**
 - a. **Is there a comfortable atmosphere?** - Yes
 - b. **Do you feel out of place as a Namibian?** – No, I've traveled all my life.
 - c. **Do you feel you get the same quality of services as foreign tourists?**
I have traveled a lot and stayed in accommodations like camping.
Many Namibians go to lodges and expect more services than offered.
- 13. Any other comments on what you would like to see different the next time you visit these places?**
Service etiquette needs to be improved

Domestic Tourist Interview 5

April 12, 2007 – Group Interview with 1a

1. What do you do at NTB?

I work in Accounts as Data Clerks.

2. Where do you live?

I am from the North.

3. How much holiday time are you allowed per year?

I get 50 days.

4. How much of that time do you use for travel?

Generally, I use one week here, one week there.

5. Do you travel on weekends, how often?

Yes. Sometimes.

6. Where do you travel to?

I travel to Tsumeb, or the Coast.

7. Why? (VFR, leisure, other)

I have Family in Tsumeb, but I travel to the Coast for Leisure.

8. How do you travel there? (car, bus, minibus, air)

It depends on the number of people traveling. I take the train with family, but I take the minibus with smaller groups.

9. What do you do there? (accommodations, activities)

I stay with family in the north, and in-laws in Walvis Bay. There is nothing to do in Tsumeb other than parks and swimming.

10. Do you think these prices are reasonable, why?

They are reasonable before winter, but during Nov/Dec it's too expensive. You can't negotiate discounts.

11. Do you take advantage of domestic tourist specials? Please explain.

NWR gives a discount but you must prove identity as Namibian.

12. How do you feel about the places you go?

Is there a comfortable atmosphere? Yes

Do you feel you get the same quality of services as foreign tourists?

Yes

13. Any other comments on what you would like to see different the next time you visit these places?

I'd like to see more activities offered, especially in city centers. Also, customer service needs to be improved.

Domestic Tourist Interview 6

April 12, 2007 – Group Interview with 1b

1. What do you do at NTB?

I work in Accounts as Data Clerk.

2. Where do you live?

I am from Windhoek.

3. How much holiday time are you allowed per year?

I receive 24 days for holiday.

4. How much of that time do you use for travel?

I only use some of it for travel.

5. Do you travel on weekends, how often?

Yes, I prefer to travel on weekends

6. Where do you travel to?

I travel to the North.

7. Why? (VFR, leisure, other)

I travel to visit Family, but sometimes for fun.

8. How do you travel there? (car, bus, minibus, air)

I travel by Minibus.

9. What do you do there? (accommodations, activities)

I use the Bungaloes at Swakopmund. I go quad-biking and sunbathing, or play sports. Sometimes I stay with friends and family to save money.

10. Do you think these prices are reasonable, why?

Pricing isn't an issue for NTB, they usually give a discount.

11. Do you take advantage of domestic tourist specials? Please explain.

NWR gives a discount but you must prove identity as Namibian.

12. How do you feel about the places you go?

Is there a comfortable atmosphere? Yes

Do you feel you get the same quality of services as foreign tourists?

Yes

13. Any other comments on what you would like to see different the next time you visit these places?

I would like to see Customer Service improved

Domestic Tourist Interview 7

1. What do you do at NTB?

I work in Accounts as a Data Clerk

2. Where do you live?

I am from the North.

3. How much holiday time are you allowed per year?

I am allowed 30 days

4. How much of that time do you use for travel?

I do not travel.

5. Any other comments on what you would like to see different the next time you visit these places?

Customer Service definitely needs to be improved.

Appendix H –Government Tourism Sector Interview Summary

March 14th, 2007

**** Discussed Festivals and Museums

- . Festival in September lasts 1 week
 - Has been run for the past 4 years
 - Well attended by foreign and domestic tourists – highest volume of tourists
 - Plan travel in accordance
 - Kick off with a parade on Independence Ave.
 - Performances by cultural groups – poetry, drama, theatre
 - Promoting local artists and accommodate international artists i.e. Germany
 - Paid minimal fees – encouraged to give back and share their talents
 - Joint venture with Finland to learn from each other's cultures
- . Museums – trying to establish an Old Location Historical House
 - Cannot focus on Old Location itself, need to include history of Windhoek
 - Architecture, electricity, water, etc.
 - Ready to put a plan together and start designing
 - Currently a temporary exhibit sponsored by the Finnish
 - Modeled after District 6 Museum, other museums in S. Africa, and Finland
 - Plan to include the museum in city tours to learn about the culture
 - People will perform cultural activities, coffee shops, etc.
 - Former old location residents as tour guides – will be subcontracted as form of employment

**** discussed Awareness

- . Domestic tourism has to do with awareness – Windhoek residents don't know what tourism is about
- . Teens in Tourism Campaign
 - Grade 12 students from different schools
 - Spend 3 days in a hotel, attend tours, and learn the benefits of the tourism industry i.e. working as a tour guide, selling arts and crafts, etc.
 - City hopes they will share knowledge with their peers and parents and spread a positive attitude
 - Given a questionnaire after the sessions
 - Realize there is a need for a pre-questionnaire
- . Black Economic Empowerment
 - Free training for caterers/restaurants on safety/hygiene/quality standards so that they can be recognized and utilized for tourism – traditional foods
 - Accommodations and establishments training on service, finance, budgeting, and marketing
 - Cross check evaluation
 - Training for tourism guiding
 - Become accredited by the city of Windhoek

- Given referrals and other forms of help
- Currently the 4th group of training
- Guides seen the benefits
 - Respect and recognition

**** discussed different types of current projects

- City residents are not exposed to the natural environments
- 1 walking trail completed, working on another in Katutura
 - History attached to trail
- Have not thought about transportation to the trail, still developing
- Heritage route that never kicked off, but continuing
 - City center to old location to Katutura – different activities
 - Hop on Hop Off bus planned
 - Need a cost strategy
 - Free if run by city
 - May tender to other vendor
- Hot water springs (13 bore holes in Windhoek)
 - Feasibility study done with tourism stakeholders and city planners
 - Not found viable due to location in basin and lack of water – costly to transport, and hot water springs located everywhere and people wont travel to Namibia just to see them

Research Methods

- Most research based on consulting with people i.e. Black Economic Empowerment
- Boards decide on issues like museums
 - Consist of former residents, history departments, teachers, etc.
 - Meetings, workshops, interviews

Other thoughts

- New year's Eve celebration
 - Brings Namibians together
 - Attracts many tourists – 6000 people last year
- City has interviewed residents to obtain their perceptions
 - Complain of little to do
- Holiday travel depends on individual and company
 - National holidays such as Easter or Independence day often combined with annual leave
 - Employer generally gives certain days per month, some save for longer holidays
 - Very flexible leave schedule – can be carried over up to 120 days
- Expensive to travel, cost of accommodations too high for domestics
- Most come to the city to shop and then leave, would rather spend money on family
- Most focus is on day trips
- People don't understand what tourism is about
 - Don't understand why tourism is needed/benefits
 - See tourists as targets for stealing rather than as sources of income for the country
- National parks incur many fees i.e. entrance, lodging, food, etc.

- Unsure of the willingness for people to reduce their prices for domestic travelers
 - Some hotels have local prices but are still relatively pricy
 - Companies of city focus already cater to locals, but want them to join the mainstream
- Domestic tourism is expected to open a lot of job opportunities and business ownership
- Should suggest to the NTB to focus on awareness at a national level and for service providers i.e. price structure
- Katutura residents angry about tourists who don't buy
 - Don't understand why tourists are coming
 - Plan to get them involved by giving market tours
- NTB doesn't have money to produce quality brochures for domestics

- City will coordinate people at different income levels to give questionnaires
 - Should translate into local languages
- Should visit Kunene Region, Ovamboland
- Swakopmund a tourist hub for DT especially at Christmas

Appendix I –Industry Leader Interview Summary

- What types of SPs would be beneficial to interview?
 - Accommodations
 - Safari Operators
 - Municipalities
 - City of Windhoek
 - Tours of City
 - Get people to stay here in Windhoek
 - Domestic Tourism
- Vast Majority of Namibians don't have a disposable income
 - Don't Think About Going On Holiday
 - Most Don't Have Cars
 - Similar to other African Countries
- When you make money
 - Priorities
 - Car
 - House
 - Comfort Items
- Namibian Price vs. International Price
 - Providers want International Price for better profits
 - “Why the hell should I discount the price?”
 - Traveling around Peak Seasons
 - Commissions because of International Agents
 - Seasonality
 - Not as empty as it used to be
- Most of industry isn't willing to change
 - If they come direct instead of outside, sometimes more willing to change price
 - Nobody is going to tell that because of ‘flooding’
 - It won't be advertising
 - 10% is a minimum discount because of the commissions in comparison.
- You wouldn't see Namibians on a camping Safari
 - Black Namibians want Sun City/Swakopmond?
 - What are their expectations?
 - What would turn them on?
 - Fast Growing Black Middle-class
 - Rubuth Resort (*look into*)
 - Funboctown
 - Swakopmond
 - Already really geared for tourism in general
 - They won't have Namibian rate vs. International Rate
 - What exactly are they looking for?
 - Theme Park
 - Domestic Tourism is a completely different product
 - Lot of people in Namibia have family in Germany, those have disposable incomes

- When they actually go to Etosha, they are amazed but they don't think about going to places like that
 - "They know what it is, they don't need to see it"
 - Don't know about the Seals
- Vast Majority of Namibians doesn't know what a Cape Seal is...
 - Its exciting when they get there but it isn't in the front of their mind
 - Different Perceptions
 - Wide Open Spaces
 - "Boring," "Big Deal"
- Casinos are domestic travel but they don't consider it a holiday
- Company Issues/ P.C.
 - Expectations are much different
 - Rubs people the wrong way
 - Blacks aren't allowed to do they same thing because of "rules" that still happen
 - They get burned so they get 'full' so they don't want to deal with it
 - Tricky
 - Aren't used to travel systems (11am check in, etc.)
 - Internationals Are
 - Use the black card so it makes the lodge in a sticky situations
- Black Namibians Don't Want Camping Safaris because it is going Down rather than up
- ****
 - Marketing
 - Budget Safari
 - Wanted to get over the "backpacker" image
 - 3 or 4 day trips
 - Camps
 - Local Backpackers Advertising
 - Majority come from South Africa Around to Victoria Falls
 - After locals, marketed to Cape Town hostels
 - Got a website
 - Up-To-Date
 - Business from Internet
 - That's the generation they want
 - Want Younger People
 - Did not want to target Germany
 - Namibia already has a ton of companies marketed towards there
 - Not much point
 - Targets U.K.
 - Family Ties
 - Working Very Well
 - When Namibian Tourism Board started, they wanted to target the UK also.
 - FENATA, president of it for 3 years

- They still get a lot of Germans because the ones they are getting aren't wanting a typical German only Safari
 - Only Germans fussy about it
 - Doesn't Even Target South Africa/Regionally
 - South Africans Self-Drive
 - Botswana too similar
 - Domestic Don't Want to Camp/Open-Fire Cooking
 - Don't Start Sprinting Before You Can Walk
 - Only go to two International Trade Fairs a year
 - London
 - South Africa
 - Travelers usually just do their homework
 - Good Luck Involved in doing Well
 - Worker went to UK and it went like Wildfire
 - Most Safaris Are All Scheduled
 - Sometimes Only Certain Travel Agencies Have Their Own Tours
 - Guarantee only 4 seats or so
- NTB is getting pressure for the government to get more blacks doing to the travel shows
 - People Don't Know What to Do when they get to the international shows
 - Don't Do Homework before going
 - Can't Go To WTM without research and a base
 - First, get Namibian Safari Operators to go to the Lodge
- Its hard to start a tourist company if you have never been a tourist
 - Social Background
 - If it doesn't mean much to you, it won't go far
 - When you have background, its easy to get others enthusiastic
 - Polite, Quick, Exciting
 - Baiting and Hooking the Fish
- Namibia is twice the size of France; Etosha is the size of Belgium
 - Getting of the wavelength of the tourist
- Consumer Fairs Open to General Public
 - Individual Lodges can do well at that
 - Wild Dog only does trade because of the Agents they work with
 - Want the Relationships With the Agents
 - Exchange Emails
 - Constant Working rather than being passive
- NTB Lacks Details Often to start-up companies
- No point going to spend 50000\$N if you only get 30000\$N of business
 - Most people don't
 - Only small percentage is affordable
 - Chains, etc
 - Packages work better than individual components
 - "Want a pie"
- Website
 - Need Nice Website
 - Search Engine

- Needs Exact Product rather than just Whatever
 - Seems like you are more passionate about it
 - Makes Happy Customers
 - Help even if you can't do it, refer them
 - Nobody can do everything well
- Job Opportunities
 - Local Namibians most for tour Guides (50 people in company, everyone Namibian except the owners, not many white folks)
 - Fair turn over in staff
 - 2-3 years they change
 - Needed for excitement
 - You don't want someone bored working for you
 - Want Motivations
 - In house training
 - Very little normally in training
 - Starting to get formalized and needing qualifications
 - Even for the experienced, no grandfathering
 - With ****
 - 3 Month Probation Period
 - 24 Hour Notice
 - If it doesn't look like it working, discuss the problems
 - First few weeks, workshop work
 - Learning how to pack, do tents
 - Then goes out with senior guides and showing willingness to do learn
 - Slowly takes over until the senior guide can have holiday
 - Then does the smaller tours and moves up to the 3 week tours
 - If they don't how to cook, they have to learn with the office
 - Assistants don't automatically become guides
 - 2 years of driving experience
MANATORY
 - Do Airport Pick-Ups To Learn Driving Issues
 - Prefer doing training themselves
 - Black guides more likely to make them a career than just a job
 - Much more patience for bad apples than the white guides who get grumpy
 - Make them more assertive, overcoming their mindset of 2nd class
 - You don't want to train them because they may jump ship to go to another company that would pay them more
 - AIDS is a problem
 - Why bother training them if you are going die

- Namibia has the biggest opportunity
- NATH
- Growing Middle-class
 - Trends towards more vacations and safaris

Appendix J – Sample Brochure

See attached file on CD.