A Survey Of The Victoria Falls With A View To Repositioning This key Tourist Attraction In Zimbabwe

By

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Submitted in partial fulfillment of the requirements for the degree of
MASTERS IN BUSINESS ADMINISTRATION

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June 2004

CONFIDENTIALITY CLAUSE

30 June 2003 – 30 June 2008

TO WHOM IT MAY CONCERN

RE: CONFIDENTIALITY CLAUSE

Due to the strategic importance of this research it would be appreciated if the contents remain confidential and not be circulated for a period of five years.

Sincerely,

Mutyambizi

Y. Mutyambizi

DECLARATION

This research has not been previously accepted for any degree and is not being currently submitted in candidature for any degree.

Signed............Ftutyambizi..............................

Date........16....September.....2004..........

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STATEMENT

ACKNOWLEDGEMENTS

I am very grateful to my supervisor, Dr Dennis Laxton, for his mentoring throughout this final stage of my MBA program. I would also like to thank my dear mother, Mrs. J Mutyambizi, for being a second mother to my daughter Michelle who could not always understand why I was devoting more time to my books instead of spending time with her. I also thank Ruth Chapereka, for being a very dear and supportive friend and group member throughout the entire two-and-a-half year duration of this MBA. This study would not have been possible without the help of my aunt, Mrs. G Dongo and her colleagues at the Zimbabwe Tourism Authority, namely, Mr. S Mapfungauste, Mrs. Kateteka, and Ms P Ndlovu.

ABSTRACT

This study looks at the ailing Zimbabwean tourism industry and efforts to reverse the negative trend in tourist arrivals. Despite this sector of the economy enjoying positive growth both globally and at a regional level, the local industry had been adversely affected by negative perceptions about the country. The Zimbabwe Tourism Authority (ZTA), whose mission is to professionally market Zimbabwe as a leading tourist destination, has embarked on various initiatives. Unfortunately however, the organisation has enjoyed limited success in recapturing the demand experienced in the years prior to 1999. In order to investigate other avenues to pursue, this study sought the perspectives of two major stakeholders of the local tourism industry. These were namely "buyers" comprising the international tourist, who were probed for their motivations in selecting a holiday destination. In addition, local "suppliers" to the sector who interface directly with the international traveller, were asked to give their perspective on the performance of the ZTA in fulfilling its mission. Personal interviews were conducted in the resort town of Victoria Falls. This area was chosen over other attractions in Zimbabwe because our neighbouring competitors, South Africa and Zambia have promoted the resort for their own benefit, at the expense of the local industry. Another reason is the worldwide recognition and appeal of the attraction, owing to its historical significance. The study established that the resort still enjoys immense popularity, with international visitors opting to return several times in order to gaze at the scenic wonder. However, since the falls lack a truly Zimbabwean identity or image, travel agents and tour operators have either channeled tourist to the Zambian side or flown them in via South Africa as day visitors. The resultant effect has been minimal financial benefit to Zimbabwe by way of receipts from tourist expenditure. Adopting a co-operative strategic orientation with these neighbouring countries is recommended. At a local level the study found that the local tourism industry lacked a unified approach in tackling the challenges facing sector.

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-CHAPTER ONE –

1.1 INTRODUCTION

Zimbabwean tourism experienced rapid growth since the country gained independence in 1980. During the decade 1989 – 1999, tourist arrivals grew at an average growth rate of 17.5% whilst tourism receipts increased at an average annual growth rate of 18% in US$ terms and 25% in Z$. However, the prevailing economic, social and political environment has seen the sector experiencing the worst performance since independence. The country has experienced 11% drop in tourist arrivals (1999 –2000) and 38% drop in receipts (US$) within the same period (Internet 1).

Tourism is not a one-ministry activity. Effective tourism planning affects and is affected by other national economic and social activities. Coordination is necessary from the level of Cabinet down to the level of communities... to increase market share and maximise economic benefits from the industry (Internet 2).

The Zimbabwe Tourism Authority (ZTA) is a parastatal falling under the Ministry of Mines, Environment and Tourism and its mission is to " professionally market Zimbabwe as a leading tourist destination, set, and monitor standards, provide market research and statistics, and assist in creating an enabling environment, for the benefit of the nation and its visitors" (Internet 3).

In fulfilling its mandate, the organisation needs to "match its strategy to industry and competitive conditions", as proposed by Thompson, Jnr and Strickland III (2003:259). The tourism industry in Zimbabwe can be classified as "weak or crisis ridden" and therefore requires effective turnaround strategies to reverse the negative trend. It is necessary to investigate issues that led to the decline as well as to highlight and reaffirm the success of initiatives undertaken to redress the crisis in the tourism sector.

1.2 Literature review

Every tourist destination in the world has a "brand image". If developed carefully the brand serves to differentiate a destination from competing destinations. However some destinations do not have a brand strategy, and are supported by inconsistent advertising campaigns, creating a confused image to prospective customers. Image must be controlled by a clear projection of brand identity, i.e. positioning

When consumers decide on a destination for a holiday or a business conference, several "brands" compete for their attention. A strong brand is differentiated from others, has several strong advantages when compared to others, and has an attractive appeal to consumers. In tourism, while factors such as cost of travel, convenience, and quality of facilities are important, the strongest motivator is "image". Image puts a destination on the consumer's "shopping list" and creates an emotional appeal, which enhances that destination's chances of being chosen over others.

Developing a strong image for any brand requires a carefully planned brand strategy based on:

1. A well defined and unique brand personality
2. Selection of the correct positioning strategies
3. 'Themed' product development
4. Consistent and appropriate advertising and promotion
5. Careful brand guardianship (Internet 4).

Through the use of repositioning, using a selected destination like the Victoria Falls, Zimbabwe can salvage its tarnished reputation and compete for a share of the global tourism market. Fig 1.1 depicts the various repositioning strategies available to marketers.

Fig 1.1 Repositioning Strategies

		Product	
		Same	Different
Target Market	Same	Image Repositioning	Product Repositioning
	Different	Intangible Repositioning	Tangible Repositioning

Source: Internet 5

The importance of correctly repositioning is based on the potential earnings that the country can derive from this industry. According to statistics from the World Travel and Tourism Council, "Travel & Tourism is the world's biggest industry, accounting for nearly 200 million jobs, and over 10 per cent of world GDP, more than US$3,500 billion " (Internet 6).

Chacko (1997), in his article "Positioning a Tourism Destination to Gain a Competitive Edge", says that "one of the most effective tools in tourism marketing is positioning…an effective positioning strategy provides a competitive edge to a destination that is trying to convey its attractiveness to the target market" (Internet 7).

1.3 Motivation for the research

There is a disturbing trend that is clearly evident on comparing tourism trends within i) Southern Africa, ii) "Other" Africa and iii) the Rest of the World for the period 1998 – 2000. Tourist arrivals grew by over 7% for 2000 compared to prior year levels in "Other" Africa and the rest of the world. "Southern Africa region experienced a modicum growth of 0.6% arrivals in the year 2000 compared with an 8.3% growth in 1999. This was largely a result of intense negative press publicity of the region internationally during the period resulting in negative perceptions by travelers on the destination regarding the safety and security of tourists" (Internet 8). What is even more disturbing is that Zimbabwe recorded to the highest decline of –11.2%, whilst neighboring Zambia and Mozambique grew by an impressive 25.9% and 22.2% respectively.

There is huge market potential for the tourism industry within the Southern African region. This study is therefore motivated by the need for Zimbabwe to regain lost market share by capitalizing on one of the Seven Natural Wonders of the World. According to Nkala (2003:11), as a result of the "bad image Zimbabwe had, most tourists were opting to view the falls from the Zambian side."

1.4 Value of the project

The tourism industry in Zimbabwe is a major foreign exchange earner, which has a direct bearing on our Balance of Payments position. This study will be of benefit to ZTA in its repositioning drive. Of the four strategies depicted in Fig 1.1, the current repositioning effort is one centered on image. ZTA's marketing efforts are directed at the same target market as in prior years, i.e. the Overseas Market, using the same tourism products i.e. various Zimbabwean tourist attractions. A new initiative has seen the organization exploring new markets in Asia. Current initiatives focus primarily on the Victoria Falls, selected for its worldwide recognition and immense brand equity.

Another benefit of this study is that it will assist in developing a learning curve enabling best practices to be extended to other tourist destinations within Zimbabwe, whilst avoiding any pitfalls encountered in executing the repositioning strategies in Victoria Falls.

1.5 Problem statement

Presently, the *management dilemma* facing the ZTA has been triggered by the continued decline "in recent years despite attempts to attract tourists through flying in international travel writers and hiring international lobbyists. None of these initiatives have brought the desired results"(Internet 9). As a result, the *management questions* need to be centered on how the organization can redress this negative scenario, whilst capitalizing on any opportunities. Since these management questions will entail the generation and evaluation of solutions to the current crisis, there is a need to pose *research questions* that will lead to plausible courses of actions. The key to producing effective and sustainable solutions hinges on making informed decision with regards to the formulation and implementation of a marketing strategy for the Victoria Falls. Thompson, Jnr and Strickland III (2003:75) stipulate that this requires *investigative questions* that will "guide the development of the research design and are the foundation for creating the research data collection instrument." Typical investigative questions include:

- "What has been the trend in tourist arrivals by target market?"
- "Can this trend be linked to any environmental variable?"
- "Are these environmental variables controllable or uncontrollable, i.e. do they pose any constraints on the organizations marketing efforts?"
- " Are there any synergies that can be created between Zimbabwean tourism and neighboring tourism industries.

In order to gain actionable insights based on the responses to the above questions, appropriate *measurement questions* need to be asked. Given that this type of visitor survey is a universal approach which has proved effectual in resuscitating tourism destinations the world over, pre-designed measurement questions "that have been (Thompson, Jnr and Strickland III, 2003:76) formulated and tested by previous researchers…can be applied for the project at hand. This will enhance the validity and reduce the cost of the project." However, where appropriate; customization will of course be necessary to suit local conditions. It will only be after the preceding Management –Research Question Hierarchy has been completed, that research findings will hopefully enable this researcher to offer recommended courses of action.

In summary, the problem statement for this research is:

> "What actions need to be taken to reverse the negative trend in tourist arrivals at Victoria Falls, thereby boosting the country's foreign exchange earnings?"

1.6 Objectives of the study

The objectives of the study will be to review the Victoria Falls over the past several years in order to:

1. Establish the trends in tourist arrivals with respect to volumes, mode of transport, and tourism receipts.
2. Identify issues that support or hinder development or reorientation of tourism products in the public and private sectors.
3. Review current and past marketing strategies, their successes and shortcomings.
4. Assess likelihood of current tourists in recommending the Victoria Falls to others in their home countries.

1.7 Research methodology

In order to fully understand the nature of the tourism industry in Zimbabwe, it will be necessary to gather information from two sources, which are part of the stakeholders in the local tourism sector. Therefore the sampling frame will include (1) the long haul international tourist and (2) decision-makers for example members of the hospitality industry, travel agents and tour operators. The latter is selected based on the fact that they are suppliers to the tourism industry and interact directly with the target market. Access to the sample will be facilitated by the fact that these stakeholders should be registered with the ZTA will therefore be easy to locate. An unrestricted non-probability convenient random sample will be chosen from the ZTA database. This technique has been chosen so as to specifically target those stakeholders whose operations are directly linked to the Victoria Falls.

The research technique is essentially quantitative, and will involve the collection of some qualitative data through the use of semi-structured interviews and questionnaires. The type of study to be conducted is an interrogation/communication study, whereby data will be collected by way of personal interviews. Several techniques (Thompson, Jnr and Strickland III, 2003:343) will be employed to increase participation or response rate following the Total Design Method (TDM), for example by ensuring preliminary notification, designing a questionnaire of moderate length as well as highlighting response deadlines.

Following the field and central edits, the questionnaires will be coded for analysis. The Statistical Package for Social Sciences will be used to facilitate the generation of frequency tables.

This dissertation, when complete, will include " full documentation and detail of sources of data, research procedures sampling design, data-gathering instruments, data analysis and recommendations" as set out in Thompson, Jnr and Strickland III, (2003:147).

1.8 Limitations of the project

- Statistics: The study is unable to give some statistics for Victoria Falls per se, given that most of the previous or existing data collections methods have focused on an aggregated or country level perspective.
- Currency of information may present problems, as some data sources may not be up to date.

Further limitations will be discussed in section 3.12 in the methodology chapter.

1.9 Structure of the study

The following chapters will be presented in the final dissertation, and will contain the following information:

- **Chapter two:** A detailed review of the literature is given, concerning the theory of competitive forces, environmental variables, consumer decision-making and motivations for travel, market segmentation, targeting and (re-) positioning. This will be followed by an overview of the ZTA, how it is positioned within the Ministry of Mines, Environment and Tourism. Graphs and tabular representations will then be used to depict the state of the local tourism industry. This section will conclude with a review of press articles form various countries.
- **Chapter three:** This chapter will firstly reiterate the problem statement and objectives of the study. The rationale for the geographic coverage will follow. The technique used to compile the literature review in the preceding chapter will be discussed. To enable an understanding of how the study was conducted, details of the research design, sampling design, data collection instruments and data analysis will follow. The latter section will summarize the nature of the questions included for both the tourists and the trade. This chapter will end with a discussion of sources of error and limitations to the methodology. Samples of the survey instruments used for the trade and tourists, together with the relevant show cards will be placed in the appendix section.
- **Chapter four:** This comprises reporting of the survey findings by way of graphs and selected tables as well as this researchers' discussion or interpretation of results. Detailed frequency tables of the questions contained in the survey instrument will be placed in the appendix section.
- **Chapter five:** Recommendations will be given based on the findings of the preceding study. This researcher will also recommend areas for further study where results are inconclusive

1.10 Summary

It is evident from the preceding discussion that the Zimbabwean tourism industry is failing to perform as well as other countries in the region, both with respect to arrivals and more importantly receipts. Analysis of the literature pertaining to the local tourism industry shows that the poor performance is largely attributed to a very poor image of the country. Despite some limitations, this research is motivated by need to the fact that some neighbouring countries are exhibiting remarkable growth in their tourism industries. A detailed review of the literature in Chapter Two is intended to lay the groundwork for the research.

-CHAPTER TWO-

REVIEW OF LITERATURE PERTAINING TO MARKETING

2.1 Introduction

This study aims to provide actionable insights on the marketing of a key tourist destination in Zimbabwe. This literature review investigates the theoretical frameworks or models derived primarily from the marketing discipline. It will enable an understanding of the factors that have an impact on any strategies that may be proposed. This review is intended to enable the reader to become familiar with how the ZTA interacts with other players within the local tourism industry as well as the state of this sector.

Thompson and Strickland (2003:3) define a company strategy as "consisting of the combination of competitive moves and business approaches that managers employ to please customers, compete successfully, and achieve organizational objectives". These "competitive moves" are determined by Michael E. Porter's **Five Forces**, (1980). In addition, any company's game plan is invariably affected by its macro environment, necessitating a **PEST Analysis.** This entails an examination of Political, Economic, Social and Technological factors as a tool for understanding market growth or decline, and as such the position, potential and direction for a business. Ultimately, strategic efforts are directed towards the consumer. Thus in order to tailor or customize the strategy, a thorough understanding of **consumer behaviour** as it relates to decision making is required. Only after exploring the above-mentioned factors, can the organization attempt to effectively segment, target and ultimately position – or in this case *re-position* its product or service offering.

It is important to note Recklies (2001) article (Internet 10), "Management Models – what they can do and what they cannot do" before delving into the available literature. The main points of the article are:

- Models are a simplified picture of reality and should therefore be used with caution.
- At times the number of elements included is limited to reduce complexity.

- They were developed in a particular historical context. Thus should conditions change, e.g. the characteristics of the competitive environment, the model may not necessarily lose its applicability entirely, but it will not however, contribute to decisions as in the original context.

2.2 Porters Five Forces Model

Thompson and Strickland (2003:80) recommend this model, citing its analytical power or authoritativeness lies in its extensive use in the business world, ease of application and comprehension. Laxton's Practical Guideline of Porters' Five Forces Analysis, (2003) Fig 2.1, depicts at a glance how the forces interrelate determining the level of competition prevailing. These forces will each be examined in turn.

2.2.1 Rivalry among Competing Sellers (Industry Competitors)

This is the strongest of the five forces according to Thompson and Strickland (2003), with rivalry ranging from mild to cutthroat. The dynamism of the cross-company rivalry is due to the interdependence of the competitors because any firm's strategic move is invariably met by retaliatory offensive or defensive moves. Thompson & Strickland (2003:83) cite Porter (1980:17-21) noting situations that lead to inter company rivalry. One example is an increase in the number of competitors with similar size and capability;

2.2.2 Potential Entry of New Competitors

The potency of this threat lies in the nature of the existing barriers to entry, the reactions of the existing players on the market place and the level of resources and competency of the potential entrants. Thompson & Strickland (2003:84) list several of entry barriers that may confront the potential new entrant, citing Porter *(1980: 17-21),* for example brand preferences and customer loyalty, economies of scale and access to distribution channels. Yip (1982:85-93), cited by Thompson & Strickland (2003:86) stresses that although the barriers listed above may appear formidable; they are unlikely to be an effective deterrent if the profit potential is sufficiently high

Figure 2.1 Porter's Five Forces Model Analysis

POTENTIAL ENTRANTS (*Main aim is to determine the height of barriers to entry to the tourism industry)

- **Economies of Scale (EOS)**: If the EOS is high, there is a limited threat of entry by new players as the EOS poses a big entry barrier by effectively deterring to new players on the market.
- **Product differentiation and Brand loyalty:** If the customer loyalty and brand equity is high, this is a big entry barrier
- **Switching Costs of Buyers (SCB):** The existence of high switching costs (e.g. possibly like those of holidaymakers locked into "Time Share Holidays" or Package Holidays presents a formidable entry barrier to new players.
- **Absolute Cost Advantages:** If proprietary knowledge and technology are important, or if the location of the holiday destination is important, this is a big barrier
- **Expected retaliation:** If present players, e.g. neighbouring tourism authorities or board are highly retaliatory, this poses a big barrier.
- **Government Policy:** If the tourism industry is highly regulated and characterized by lengthy approval procedures, then this presents a high barrier to entry.

SUPPLIERS

(*Main aim is to determine the power of the suppliers to change prices or withhold supplies etc.)

- **Differentiation of inputs**: If the industry competitors are dependent on a unique product, then this increases Supplier Price Bargaining Power (SPBP)
- **Availability of substitute inputs:** If these are readily available, then SPBP decreases.
- **Supplier Concentration:** If this is high, then SPBP is increased, unlike where the suppliers are fragmented.
- **Importance of volume to suppliers:** If the suppliers are dependent on the purchasing industry purchasing large volumes, then SPBP is less.
- **Cost relative to purchasing industries cost:** If this is high, then SPBP is less.
- **The impact of inputs on costs or differentiation:** If the supplier provides quality and low cost and it is very important to the purchasing industry, then the SPBP is high.
- **Threat of forward integration (FI) by suppliers:** If the supplier can integrate forwards, then this poses a very real threat, thereby raising the SPBP.

INDUSTRY COMPETITORS

(*Main aim is to determine the level of rivalry between existing players in the tourism industry.)

- **Industry growth**: High growth rate indicates low rivalry
- **Fixed Costs and Storage costs:** If these represent and important component and are high, then rivalry is high
- **Intermittent over capacity:** If this is high, then rivalry is intense.
- **Product difference & Branding:** The greater the diversity and strong brand equity of the various competitors, the lower the rivalry due to high barriers of entry caused by differentiation & branding.
- **Product switching costs:** The greater the SC, the less the rivalry
- **Firm size and concentration:** The smaller the number of competitors or he existence of one monopolistic player, the less the rivalry.
- **Diversity of competitors:** the greater the similarity of the competitors in terms of structure / culture, the greater the rivalry.
- **Corporate Stakes:** The greater the value of the target market to the competitors, the greater the rivalry
- **High exist barriers:** I the cost of leaving the industry is costly, then the greater the rivalry.

BUYERS

(*Main aim is to determine the power of the buyers to change suppliers, not buy etc.)

- **Price Sensitivity (a.k.a Elasticity of Demand)**:

1. *Purchases from the industry as a proportion of **total** purchases*: if the cost to the buyer is small, then an increase in price will not affect demand or volume of purchases.
2. *Product differences and brand identity*: If these exist, then price sensitivity (PS) is less.
3. Impact of supplier industries on the quality of the buyers end product or service: if the input is a key component in the buyer industries end product or service, then PS is lower.
4. *Buyer industry's own profitability*: if the profitability is high, this reduces PS.
5. *Decision-makers (DM) incentives*: If the DM incentive is PS, then this increases PS of buyer organisation.

- **Bargaining Leverage**:

1. *Buyer concentration and buyer volume*: if there are few buyers purchasing large volumes, then their Price Bargaining Power (PBP) is increased.
2. *Buyer Switching Costs*: If these are high, then this lowers PBP.
3. *Buyer information*: if the buyer is well informed, then this increases PBP.
4. *Threat of backward vertical integration by buyers*: If the buyer can do this, it increases PBP as it can dispense with the supplier.
5. *Existence of substitutes*: If many close substitutes exist, then PBP is increased.

SUBSTITUTES (*Main aim is to determine the level of threat by substitute or alternative tourist destinations)

- **Relative Price performance of substitutes**: the availability of similar tourist destinations providing similar fulfilment of experiential needs presents a threat to the Victoria Falls.
- **Switching costs of customers (tourists):** If the price of substitute holiday destinations is the same, then there is a very real threat of consumers opting for alternatives.
- **Buyers propensity to substitute:** If the potential tourist is actively searching for alternative holiday destinations, this poses a big threat

Adapted from: A practical guideline by Dennis Laxton (MBA) – University of Kwazulu Natal, Durban, South Africa, 2003

2.2.3 Competitive Pressures from Substitute Products

Thompson and Strickland (2003:87) suggest three factors that determine the strength of competitive pressures from substitutes: "(1) whether attractively priced substitutes are available; (2) whether buyers view the substitutes as being satisfactory in terms of quality, performance and other relevant attributes; (3) whether buyers can switch to the substitutes easily".

2.2.4 Competitive Pressures from Suppliers

Hollensen (2001:83) states that supplier bargaining power is higher in the following circumstances for example supply is dominated by few companies and they are more concentrated than the industry they sell to. Another scenario is where they pose a credible threat to forward integrate.

2.2.5 Competitive Pressures from Buyers

Hollensen (2001:84) list situations where buyer bargaining power is high, for example the buyers are concentrated and /or purchase in large volumes, or where there are many (suppliers) sellers of the product.

Porters' Five Competitive Forces model is not without criticism. Recklies (2001) notes that the model's shortcomings are due to the following issues:

- "In the economic sense, the model assumes a classic perfect market. The more an industry is regulated, the less meaningful insights the model can deliver.
- The model is best applicable for analysis of simple market structures. A comprehensive description and analysis of all five forces gets very difficult in complex industries with multiple interrelations, product groups, by-products and segments. A too narrow focus on particular segments of such industries, however, bears the risk of missing important elements.
- The model assumes relatively static market structures. This is hardly the case in today's dynamic markets. Technological breakthroughs and dynamic market entrants from start-ups or other industries may completely change business models, entry barriers and relationships along the supply chain within short times. The Five Forces model may have some use for later analysis of

the new situation; but it will hardly provide much meaningful advice for preventive actions.

- The model is based on the idea of competition. It assumes that companies try to achieve competitive advantages over other players in the markets as well as over suppliers or customers. With this focus, it dos not really take into consideration strategies like strategic alliances, electronic linking of information systems of all companies along a value chain, virtual enterprise-networks or others" (Internet 11)

Hollensen (2001:85) agrees with the preceding criticism, noting that Porter hypothesized that a firm's competitive advantage developed best in a very competitive market, characterized by intense rivalry. Hollensen (2001:85) observes that an opposing school of thought (e.g. Reve 1990; Kanter 1994; Burton, 1995) has emerged, highlighting that *cooperative* rather than *competitive* arrangements are more beneficial. In developing this argument, (Burton (1995) cited in Hollensen 2001:86) has proposed a Five Sources Model, which emphasizes horizontal and vertical collaborations, selective partnering arrangements as well unrelated and related diversification alliances.

Another critic of Porter is Downes (1998), who co-authored "Unleashing the Killer App: Digital Strategies for Market Dominance". This author seeks to replace the Five Forces with his Three New Forces, in an effort to account for the emerging competitive landscape businesses find themselves in today, as opposed to the eighties when the Porters model was more relevant. These New Forces are:

- Digitalization: whose basis is that information technology is a key resource, and that its potency is such that new entrants can penetrate an industry and leapfrog existing players.
- Globalization: which has expanded the competitive landscape beyond traditional country borders. Thus firms not only have to contend with local competitors, but those from abroad as well.
- Deregulation: Declining government influence has fuelled fiercer competition in many industries as companies embrace information technology. This has provided new opportunities for new entrants, whilst removing the protection afforded to the old players in the regulated era (Internet 12).

It is therefore clear from the preceding decision that Porters Five Forces should be used as a template to which modifications must be made in order to tailor a companies strategy to the prevailing market conditions.

2.3 PEST Analysis

The PEST analysis is a business measurement tool comprising of four uncontrollable factors, namely, Political, Economic, Social and Technological. According to Chapman (2001), the value of this framework lies in its applicability to marketing and business development assessment and decision-making, by encouraging proactive thinking, rather than relying on habitual or instinctive reactions. This author emphasizes the importance of clearly defining the market to be addressed, which might be from either of several standpoints (Internet 13). The various options include a company looking at its market, a product looking at its market, a brand in relation to its market, local business unit, a strategic option, such as entering a new market or launching a new product, a potential acquisition, potential partnership, a or an investment opportunity. The factors to consider are shown in Fig 2.2.

The political/legal environment is characterized by the laws governing a country and need to be careful monitored and complied with. The economic environment has direct implications for the profitability of a business as it influences consumer purchasing power. The socio-cultural environment encompasses lifestyles, motivational aspects, attitudes, needs and values of the target market. In addition, the viability of a target market is assessed on the basis of its demographics with particular emphasis on size, structure and trends. Kotler (2001) emphasizes that marketers should be aware of the technological environment as new technology creates major long-run consequences that are not always foreseeable.

Scoring the items under each factor heading given in Fig 2.2, enables benchmarking or comparison across several different markets or options. This further enhances the effectiveness of PEST analysis framework. In addition, the different factors can be weighted depending on their level of importance.

FIGURE 2.2 PEST ANALYSIS FACTORS.	
Political • Ecological/environmental issues • Current legislation home market • Future legislation • Home/international legislation • Regulatory bodies and processes • Government policies • Government term and change • Trading policies • Funding, grants and initiatives • Home market lobbying/pressure groups • International pressure groups	**Economic** • Home economy situation • Home economy trends • Overseas economies and trends • General taxation issues • Taxation specific to product/services • Seasonality/weather issues • Market and trade cycles • Specific industry factors • Market routes and distribution trends • Customer/end-user drivers • Interest and exchange rates
Social • Lifestyle trends • Demographics • Consumer attitudes and opinions • Media views • Law changes affecting social factors • Brand, company, technology image • Consumer buying patterns • Fashion and role models • Major events and influences • Buying access and trends • Ethnic/religious factors • Advertising and publicity	**Technological** • Competing technology development • Research funding • Associated/dependent technologies • Replacement technology/solutions • Maturity of technology • Manufacturing maturity and capacity • Information and communications • Consumer buying mechanisms/technology • Technology legislation • Innovation potential • Technology access, licensing, patents • Intellectual property issues

Source: Internet 13

The PEST analysis enables companies to examine their external environment so as to identify any trends, which Kotler (2001:136), defines as "a direction or sequence of events that have some momentum and durability". Kotler (2001) maintains that trends reveal the shape of the future and that many opportunities are found by identifying these **trends** or **mega trends**. Arbee and Naidu (2001:50) cite Naisbitt a futurist, as having defined mega trends to be "large social, economic, political and technological changes [that] are slow to form, and once in place, they influence us for some time - between seven and ten years, or longer. A booming global economy is just one example of the mega trends documented by Naisbitt.

Trendscape, (Arbee and Naidu (2001:51) an ongoing project conducted by the Unilever Institute of Strategic Marketing at the University of Capetown. Examples of the trends identified by this project include burnout, consumer power, Pavlov's consumer and the virtual world.

2.4 Consumer Decision-making / Behaviour Models

The following definitions cited in Erasmus, Boshoff and Rousseau (2001) are worth noting:

- Consumer behaviour: those actions directly involved in obtaining, consuming, and disposing of products and services, including decision processes that precede and follow these actions (Engel et al, 1995:G3).
- Consumer decision-making: the behaviour patterns of consumers, that precede, determine and follow on the decision process for the acquisition of need satisfying products, ideas or services (Du Plessis et al, 1991:11).
- Consumption behaviour: the style and process of consuming and possessing, collecting and disposing of consumer products and services including the resultant change of feelings, moods and attitudes toward the products and services (Schiffman & Kanuk, 2000:G3).

Rice (1993:283) is cited explaining that consumer behaviour models "provide a simplified portrayal of consumer processes to aid our description, explanation and control of buying behaviour " (Internet 14).

The level of complexity can be used to distinguish the various models, with simple or lower level ones comprising:

- Black Box models which disregard internal variables or the intervening mental processes, which may have an impact on behaviour. They focus merely on the inputs and outputs.
- Decision Process models simply attempt to describe the sequence followed in making purchasing decisions i.e. defining the problem, generating alternative solutions, evaluating the alternatives, deciding, implementing and lastly monitoring. Although their value lies in providing marketers with a basis on which to devise appropriate strategies for the relevant stages, they have been criticized for lacking explanatory or predictive power.
- Personal variable models disregard external variables, focusing on the mental processes of decision-making, internal elements and processes such as perception, motivation, beliefs and values. (Internet 14).

In contrast, the comprehensive or grand models try to define and relate all of the variables affecting consumer behaviour. These include the Engel, Blackwell and Miniard model, EMB (Fig 2.3), Nicosia and Howard-Sheth.

The EMB model comprises several basic decisions, with the first, need recognition being influenced by three factors: Environmental Influences, Individual Influences and Memory. A complex *search* process follows this, which is both internal and external. Pre-purchase evaluation may be complex or simple, logical or emotional or the result of a simplification. Purchase and Consumption follow and these are highly influenced by the individual consumer themselves. Ultimately Post Consumption Evaluation takes the form of satisfaction or dissatisfaction, or the consumer may decide to divest him or herself of the product or service if at all possible.

Proponents of this model, Loudon and Della Bitta (1993:612) state following advantages (Internet 14):

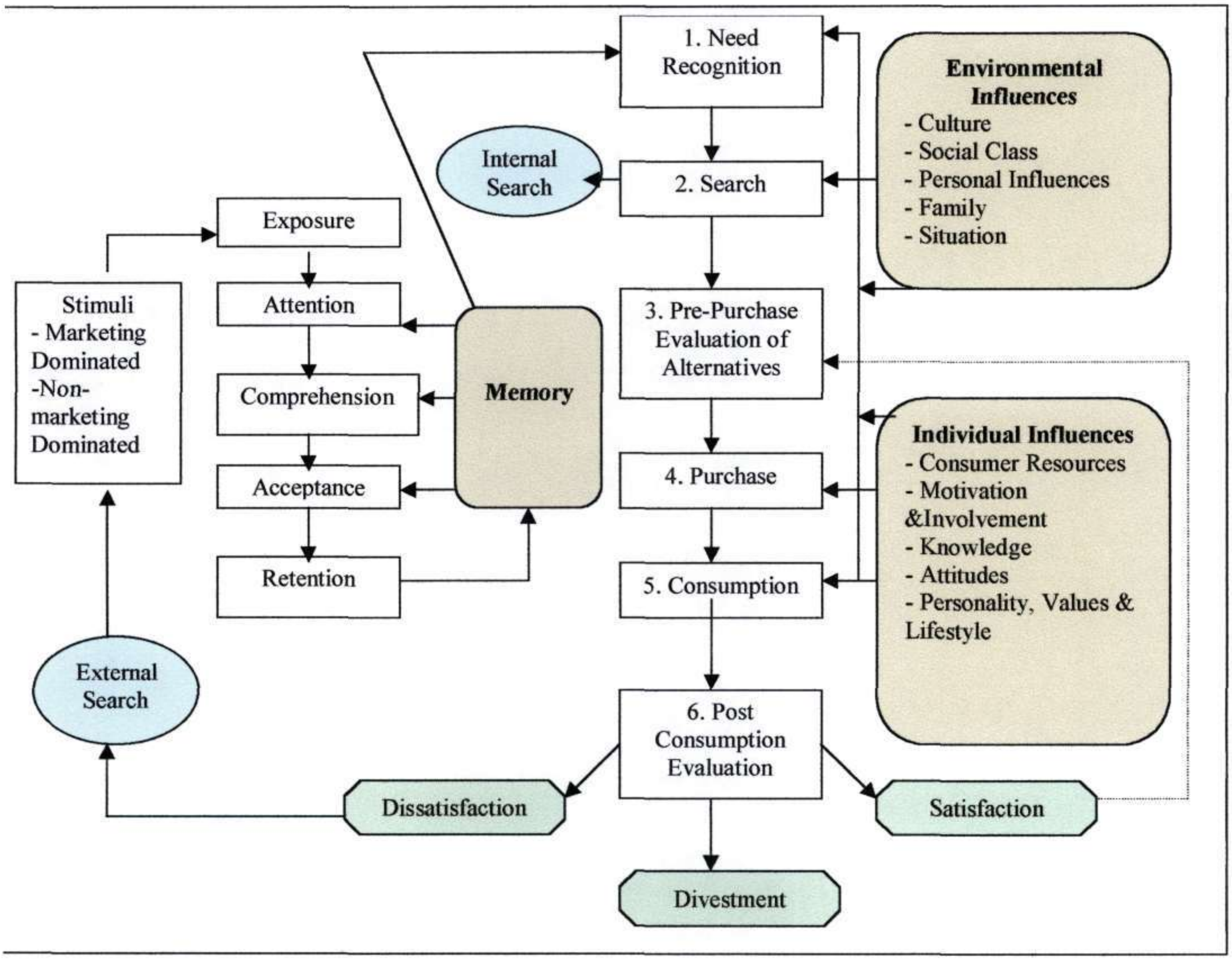
- Its consideration of the many variables influencing consumers
- Its focus on levels of consumer involvement
- Its emphasis on the decision making process regarding purchases
- The flow of the model is quite flexible

- Model incorporates numerous theories of consumer behaviour such as those relating to: a) information processing, b) motivation and c) attitude change.

However, they criticize the model citing:

- Its primary drawback seems to be a vagueness regarding the role of some of the variables e.g. influence of environmental variables is noted, but their role in influencing behaviour is quite vague.
- It is too mechanistic in its treatment of the decision process.

Fig 2.3 Consumer Behaviour – Engel Miniard Blackwell Model



Source: Internet 15

Further criticism against the validity of consumer decision-making models is given by Erasmus et al (2001). The authors note the following:

- An assumption of rational consumer decision-making.

Such models are based on the assumption that a rational approach to consumer decision-making involves the careful weighing and evaluation of, utilization or functional product attributes to arrive at a satisfactory decision (Solomon, 1996:268; Engel et *al,* 1995:G12). Rational goals are based on economic or objective criteria such as price, size and/ or capacity (Schiffman & Kanuk, 2000:G11). This approach has been said to be too idealistic or simplistic in that the real world is imperfect, and that consumers possess limited knowledge and skills in correctly identifying the best alternative.

- A generalization of the decision-making process.

The fact that models are often used to structure and interpret consumer behaviour inescapably means that the research approach, when implementing a particular decision-making model, has to coincide with certain assumptions made by the original authors. This implies that the findings are unavoidably biased. In addition, critics argue that the models tend to generalize or simplify conditions that are specialized, product and situation-specific.

- Concerns about the detail included in the models.

John & Whitney (1982:75) take the view that consumers progress through the decision-making process fairly rapidly, in contrast to the complexity denoted by traditional consumer decision making models. However, Srinivasan (1993:290) insists that decision-making involves extensive information search. It is important to emphasize that this information search is largely is a function of the products involved the timing and the individuals involved (Burns & Gentry, 1990:520).

- Limitations as a result of a positivistic approach.

According to Schiffman & Kanuk (2000:462), positivism takes the view that consumers are passive and respond to the push and pull of past impressed forces and current situational stimuli. However, Du Plessis et al (1991:21) find that this approach does not allow for intentional action medicated by meaning, deliberation of consequences of various alternatives and formation of intentions.

In conclusion, Erasmus et al (2001) note that it is apparent from the above literature review on consumer decision-making and behaviour that most of the early theories were grounded in economic theory. This presumed that consumers act rationally to maximize satisfaction in their purchase of goods and services (Schiffman & Kanuk 2000:6). Erasmus et al (2001) also note Firat (1985:5) pointed out traditional consumer decision-making models and theories were developed within certain contexts, time frames and social situations. This author explicitly warned that when the same models were applied in other contexts and with other product categories, they become forced and cause imbalances.

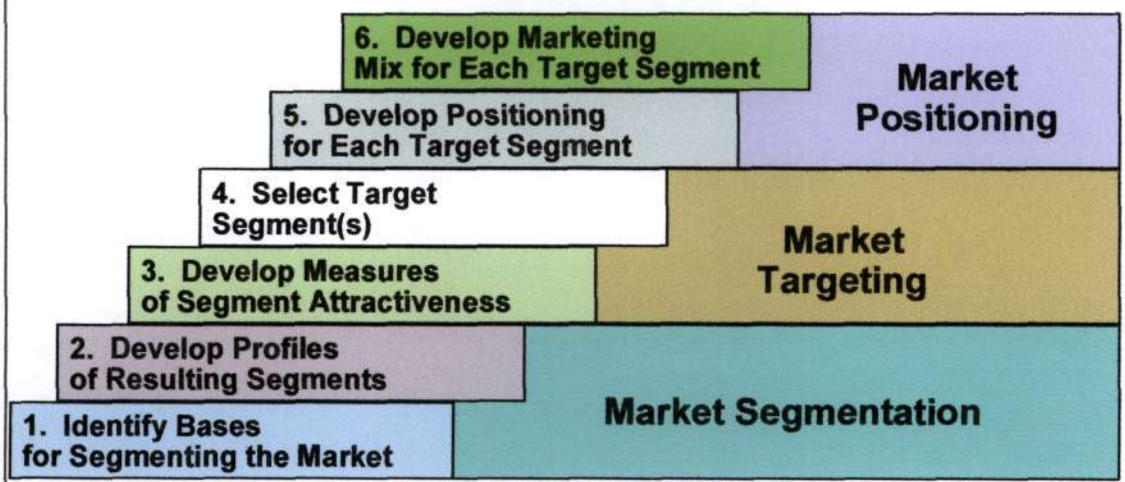
2.5 Market Segmentation, Targeting and Positioning

Kotler (2001: 85) states that "the formula segmentation, targeting, positioning (STP) is the essence of strategic marketing." Dowling states that STP is defined as a managerial decision process that seeks:

- "To identify groups or **segments** of potential customers (individuals, organizations, buying centers, etc.) whose desired values from products and services within groups are similar and whose values between groups are different.
- To select one or more groups as a **target** segment who respond favourably to a current or prospective marketing offering.
- To achieve a desired **positioning** in the minds of potential segment customers (defined broadly, as above) with a profitable marketing program.
- To constantly revisit and refresh these three steps as part of an on-going business process" (Internet 16).

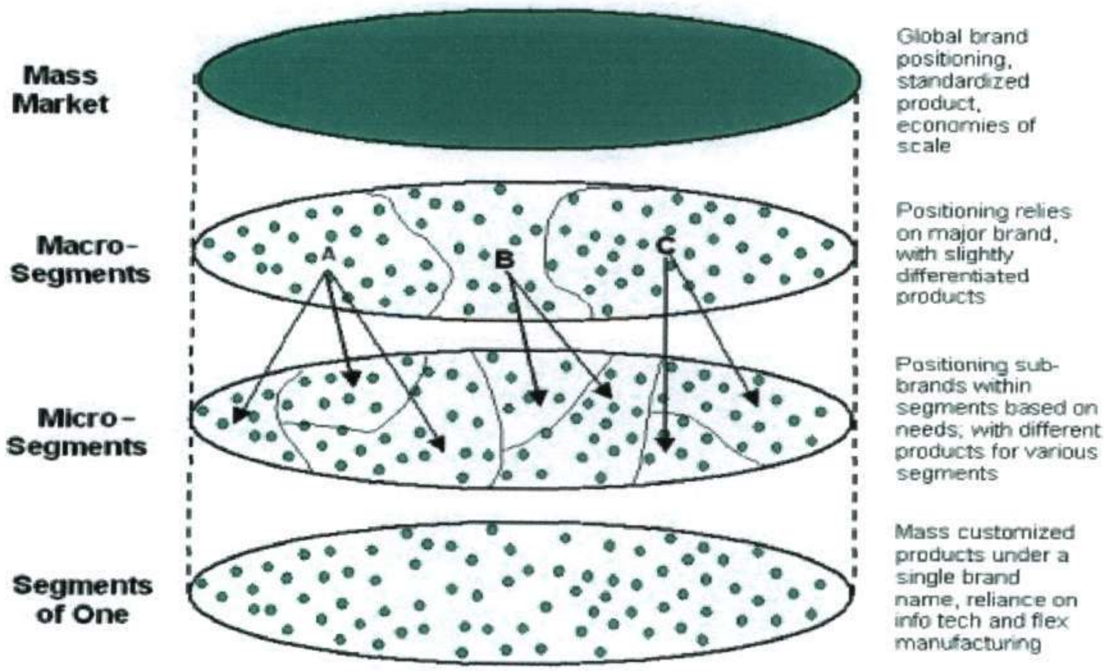
Fig 2.4 gives a graphic representation of the STP process, whilst Fig 2.5 depicts how a firm can move from a broad to a narrow focus, depending on the level of segmentation preferred.

Fig 2.4 Steps in Segmentation, Targeting, and Positioning



Source: Kotler , P; Armstrong, G (1999) Principles of Marketing, 8th Ed, Prentice Hall

Fig 2.5 Levels Of Segmentation



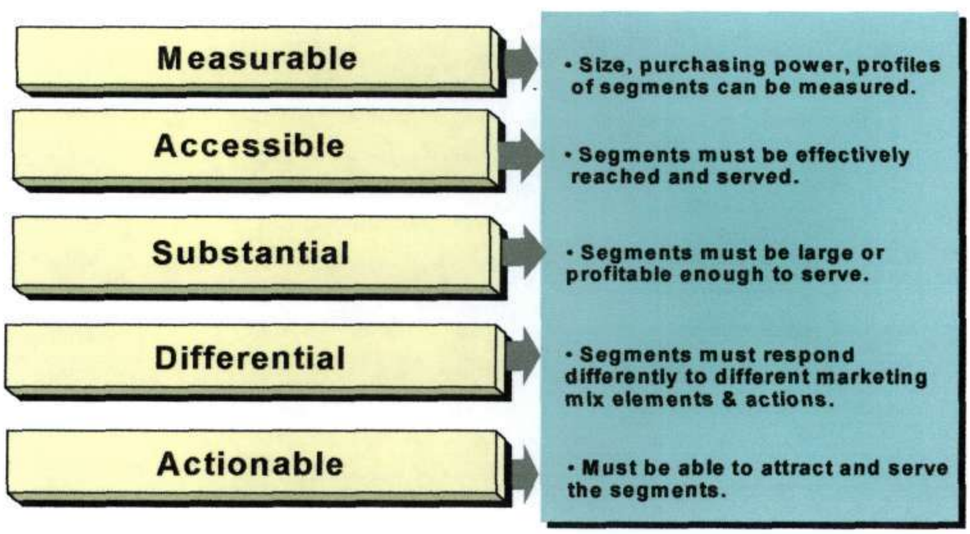
Source: Internet 16

Arbee and Naidu (2001:93) describe the following benefits of segmentation:

- Strategic Fit: the current company structure...may be better suited to serving only some segments, rather than the entire market.
- Best use of finite resources: focusing only on specific segments enables...more efficient allocation of resources.
- Profit and growth potential: the firm is able to concentrate on those segments that appear most attractive in terms of potential profit and growth.
- Customer orientation: the authors cite Dibb and Simkin (1997) stating that the company's focus is shifted form an internal to an external perspective, facilitating a better understanding of consumer characteristics, needs, buying processes, influencing factors and brand loyalty.
- Competitor orientation: According to Dibb and Simkin (1997), segmentation compels companies to analyse their competitors, with a view to gaining insights into strategies and positions, their product/brand positioning and differential advantages.
- Specialisation: through developing expertise in a given segment, companies may develop competitive advantage leading to market dominance.

Kotler and Armstrong (1999) give criteria for effective segmentation in Fig 2.6.

Fig 2.6 Requirements for Effective Segmentation



Source: Kotler, P; Armstrong, G (1999) Principles of Marketing, 8th Ed, Prentice Hall

Fodness (1999) and account of the variables commonly used as the basis of consumer market segmentation (Internet 17):

Geographic Segmentation: entails the dividing of an overall market into homogeneous groups on the basis of location. Its advantage lies in its simplicity, using variables such as region, urban/suburban/rural location, and climate. This basis is useful when differences in preferences and purchase patterns emerge along regional lines. If the resulting segments are too heterogeneous, geographic segmentation has to be used in conjunction with other segmentation bases.

Demographic Segmentation: is the most commonly used. The focus here is on such variables as sex, age, income, education, family life-cycle stage, and household size among others. Gender is a natural variable for segmenting certain markets because many products, notably magazines, fragrances, and clothing, are gender-specific. Age distribution and projected changes in a society's age distribution are important to marketers because consumer needs and wants differ greatly among groups, for many, but not all, product categories. Segmenting by income and expenditure patterns is based on Engel's Law (Internet 17), which attempts to predict consumer spending / saving patterns as family income increases. As income increases:

- A smaller percent of expenditures goes for food
- The percent of income spent on housing and household operations remains constant
- The percent of income spent on other items (education, recreation, **travel**, etc.) increases.

Psychographic Segmentation: attempts to provide a more comprehensive, lifelike profile of the consumer. This segmentation technique focuses on life-style, which refers to a consumer's mode of living. It focuses on how the individual lives, shops, and plays. It is a composite of the individual's social and psychological make-up including both interpersonal and personal influencers.

Benefit Segmentation: focuses on the benefits that people seek in a product. It is a market-oriented approach that seeks to identify consumer needs and wants and to satisfy them by providing products and services that provide the desired benefits.

Dowling (2003) notes a downside to market segmentation, in that there are increased costs that flow from increased complexity. Similarly, economies of scope may not be forthcoming as marketing and management time and increased marketing research expenses are additional costs generated with a segmentation approach. For example, targeting one segment with a strong branding and positioning strategy may increase the cost of access to other segments. For instance, marketing a product to one ethnic group may mean that a separate brand needs to be developed for other groups.

Multiple rather than single bases used to better identify segments. This is because customers may look alike (in terms of easy-to-measure characteristics like age, income, geographic location, and the like) but have with very different needs and wants, values. Geo-demographic segmentation is one example of multiple bases.

Once segments have been identified, the firm should make a selection, or target a segment of their choice. According to Kotler (2000), this entails analyzing the company's objectives and resources, as well as the segments overall attractiveness. Arbee and Naidu (2001:106) note that other authors also include the following:

- Market size and growth potential
- Level and structure of competition
- Ethical concerns
- Segment accessibility at acceptable cost.

Following selection of the target markets, ***positioning*** is required. Determan's definition i.e. "how your target market defines your in terms of your competitors", is cited in Arbee and Naidu (2001:109). The authors also quote Tybout and Sternthal (2000) stating that positioning can be broken down into four basic steps:

1. "Define the brand as a member of some product category
2. Differentiate the brand from other category members in a way that is clear and meaningful to target consumers
3. Deepen consumers understanding of the brand's benefits and of the relation of these benefits to consumer's goals
4. Defend the brand's position over time as competitors react and consumer taste change over time."

To achieve successful positioning, Arbee and Naidu (2001:109) cite five steps to successful positioning (Internet 18):

1. Research your competition to develop a strength and weakness profile of the competition as well as their strategy.
2. Research your customer needs because as a marketer, the most valuable asset you have is your share of mind and positioning with your customers.
3. Research your company to find out your own strengths and weaknesses.
4. Make a decision to focus take resources away from unimportant functions.
5. Spread the word involving all the key people in the decision making process of the positioning effort.

Re-positioning, the subject of this dissertation, is merely an extension of positioning which is defined as "the process of altering a product's position in relation to its market" (Arbee and Naidu 2001:113).

According to Chacko (1997), position is a form of market communication that plays a vital role in enhancing the attractiveness of a tourism destination. He goes on to highlight that positioning is one of the most effective tools in tourism marketing, whose objective is to create a distinctive place in the minds of potential customers' minds. In quoting Lovelock (1991:112), Chacko (1997) mentions that one of the pitfalls positioning can avoid, which has direct relevance to the Zimbabwean scenario, is where a "destination... has a negative image...and does not create customer demand". Richmond (2002), citing Fowler & Fowler (1964) and Goodall & Ashworth (1988), notes that an image is an "idea" or "conception" of something and is the "basis of the evaluation or selection process". Richmond (2002) further explains that the purpose of image creation, the mandate of tourism bodies like ZTA, is either to create, to confirm and enhance, to alter, or to completely recreate or change the existing imaged, thereby motivating the consumer to choose the product or service being marketed. The author goes on to quote Wheeler (19945:41), who describes the tourism industry as "volatile", because it is affected by world events and the health of national economies." This makes positioning very difficult, as numerous variables beyond the control of the marketer, are in operation. Accordingly, the selection of appropriate positioning method is dependent upon the natural, competitive, social, cultural, political, technological and economic environments in which the destination exists. Ultimately, the image must appeal to the target market and must be credible so as to avoid the tourist experiencing dissatisfaction when evaluating the destination during or after the holiday experience.

Knowledge of people's travel motivations and its association with destination selection plays a critical role in predicting future travel patterns. The following discussion is an excerpt taken from Hsu and Lam (2003):

- "The decision-making process leading to the choice of a travel destination is a complex one, influenced by social, psychological, knowledge, and economic factors. One of the decision-making process models relates to travellers' motivation in choosing a destination (Crompton, 1979; Uysal & Hagan, 1993). Motivation is aroused when individuals think of certain activities that are potentially satisfaction producing (Iso-Ahola, 1982). Because people act to satisfy their needs, motivation is thought to be the ultimate driving force that governs travel behaviour (Mayo & Jarvis, 1981).
- A review of the literature on tourist motivation indicates that motivation based on the concept of push and pull factors has been generally accepted (Crompton, 1979; Pearce & Caltabiano, 1983; Yuan & McDonald, 1990). **Push factors** are defined as internal motives or forces that cause tourists to seek activities/events/situations to reduce their needs. **Pull factors** are destination generated forces and the knowledge that tourists hold about a destination (Gnoth, 1997). Push motivations explain the desire for travel while pull motivations determine the actual destination choice (Crompton, 1979)".

2.6 Overview of the Zimbabwe Tourism Authority (ZTA)

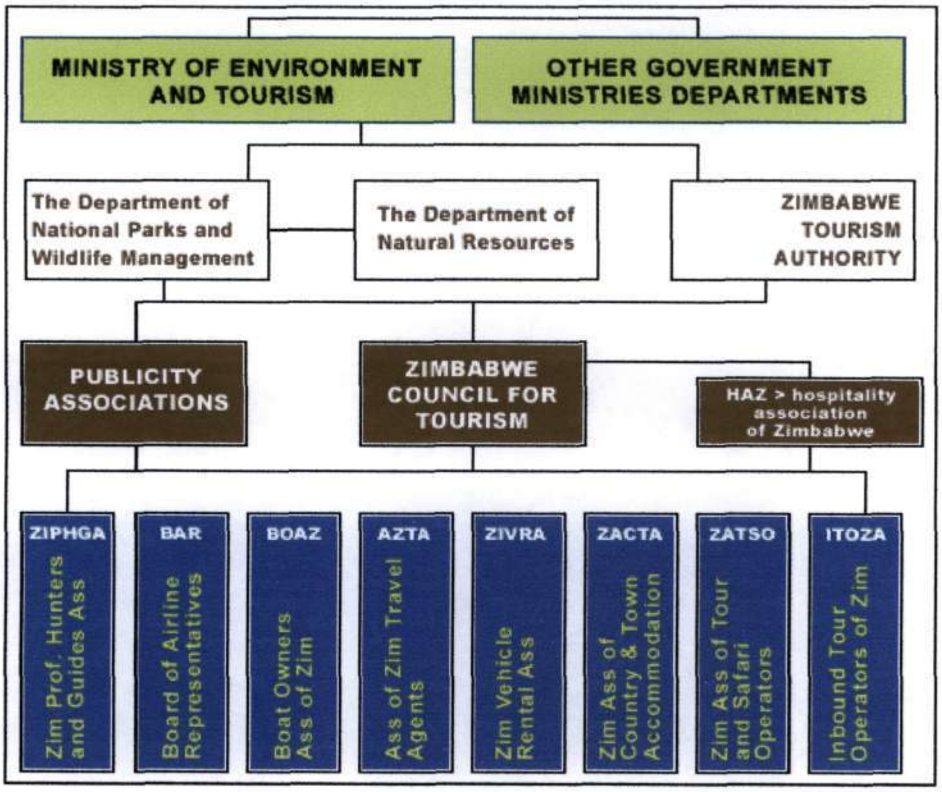
The Zimbabwe Tourism Authority (ZTA) is a parastatal falling under the Ministry of Mines, Environment and Tourism. The organization comprises four divisions, namely Marketing and Communications, Human resources and Standards, Research and Development as well as Finance and Administration. ZTA's vision is "to be the best national Tourist Organisation in the world and position Zimbabwe as a world class tourist destination." Flowing from this is the mission statement which is "to professionally market Zimbabwe as a leading tourist destination, set, and monitor standards, provide market research and statistics, and assist in creating and enabling environment, for the benefit of the nation and its visitors." The functions of the authority are (Internet 3):

- Promoting Zimbabwe as a tourist destination and promoting the tourist industry in overseas, regional and domestic markets.
- Developing marketing skills and initiatives within the tourism industry.
- Promoting high standards in the tourism industry through the establishment of standards, training and human resource development.
- Registering and grading designated tourism facilities.
- Promoting the development of tourist facilities.
- Planning for the tourism industry, including conducting market research and developing a tourism database.
- Promoting awareness in Zimbabwe of the benefits of tourism.
- Promoting consultancy and advisory services in relation to tourism.
- Investigating and making recommendations to the Ministry of Mines, Environments and Tourism on any matter affecting the tourist industry and the administration of the Tourism Act.
- Carrying out any function that may be conferred or imposed on the authority by or under the Tourism Act Chapter 14:20 of 1996.

At the seminar "Re-inventing Caribbean Tourism" held in Jamaica (2002) it was said that tourism is not a one-ministry activity. Effective tourism planning affects and is affected by other national economic and social activities. Hence, ZTA does not operate in isolation. It engages, the various private sector representatives under the banner of Zimbabwe Council for Tourism (ZCT) in dialogue. The authority also takes aboard Publicity Associations dotted around the country in its various marketing initiatives. As a way of enhancing the Publicity Association's activities, ZTA, through the marketing budget allocates them with grants for the production of brochures and or other office related duties.

There are ten registered Publicity Associations in Zimbabwe. These are found in most tourism resorts around the country. In Fig 2.7 is the diagrammatic representation of the synergy that exits between ZTA and other stakeholders.

FIG 2.7 THE ZIMBABWE TOURISM AUTHORITY AND THE OUTSIDE WORLD



Source: Internet 3

2.7 The National Economic Revival Program Framework

Since independence until 1999, tourism in Zimbabwe experienced a steady growth. During this period Zimbabwe was enjoying a continued increase of its market share in its major tourist source markets and was regarded as one of the best tourist destination in Southern Africa. However, recently the country has been receiving negative publicity abroad largely due to the land reform program. The hostile macroeconomic environment, including erratic fuel supplies, shortage of foreign currency and the perceived political instability has resulted in a decline of both tourism arrivals and receipts. In order to counter this negative scenario, a concerted effort from all stakeholders was found to be necessary. The Ministry of Environment and Tourism through the Zimbabwe Tourism Authority launched an aggressive marketing program to revive the sector. The following is the program status to date.

2.7.1 Image and Confidence Building and Marketing

- Travel Fair Participation: Involvement in fairs such as Destination Travel Fair (London), ITB (Berlin), SCI (Las Vegas), Indaba (Durban), International Travel and Holiday - ITHF (Johannesburg, Cape Town, Durban) is intended to stimulate travel from source markets and reposition Zimbabwe's image. Unfortunately, due to budgetary constraints and lack of foreign currency, the ZTA and the tourism industry did not attend fairs held in Italy or Holland.
- Tourism Attaches: These were engaged to assist in creating a positive image in their respective markets. However, their deployment was delayed due to administrative logistical problems.
- Establishment of Marketing Boards: in all major source markets, similar to those already operational in Thailand, Australia and the USA. It is intended that these boards be made up of eminent Zimbabwean or host country nationals with a keen interest in developing tourism in Zimbabwe.

2.7.2 Marketing

- External Markets: The ZTA hosted the American Travel Bureau Group and other groups from UK and South Africa. In addition a familiarization tour was also organized for a delegation of Afro American Journalists. Unfortunately however, due to lack of foreign currency, there were no market follow-ups done in the source markets.
- External and Domestic: Following the Zimbabwe Travel Expo, together the ZTA and the ZCT organized pre- and post- tours for both internal and external operators. The intention was to encourage them to help portray Zimbabwe as a stable and peaceful company. The major drawback was that due to the unfavourable business climate, fewer companies participated compared to previous years.
- RETOSA (The Regional Tourism Organisation of Southern Africa). Zimbabwe is a member of this organisation whose mandate is "to market and promote the Region in close co-operation with the Region's national tourist organisations and the private sector". The organisations lists some of its objectives for the first Five Year Business Plan as follows:
  - To increase the volume of business to the Region.

- To motivate broader intra-regional product programming in the target markets.
- To develop and sustain a mutually beneficial relationship with suppliers in the region's markets.
- To identify additional funding sources for the organisation's marketing and promotional programs (Internet 19).

2.7.3 Infrastructure Development

- Tourism Development Zones (TDZ): These are aimed at attracting local and foreign direct investment, in a similar manner to Export Processing Zones. The three areas targeted for TDZ status are Gonarezhou area, linked to the Great Limpopo Trans frontier Park, Masvingo linked to the Great Zimbabwe National Monument and Beitbridge, the largest entry point into Zimbabwe.
- Tourist Shopping Malls: The concept aimed at reserving certain areas for establishing tourist shops in urban centers and along major highways is being discussed with relevant local Authorities. In Harare proposed areas have been identified with the assistance of the City Council and the Department of Physical Planning and discussions are in progress on the establishment of such shops. Unfortunately Investor confidence is still very low due to unfavourable macro-economic environment.

2.8 Overview of Zimbabwe Tourism Trends & Statistics to date (2003)

The Zimbabwean tourism industry has become the subject of both the local and international press. Various articles accessible to the international tourist have been posted on the Internet. They have focused on various problems and proposed solutions. These include:

- Security concerns: An article entitled "Zim tourism police to protect foreign guests" appeared in the South African issue of the Star. The article describes how the Zimbabwean Government planned to institute a special tourism police unit to improve safety and deter criminals from targeting foreign tourists (Internet 20).

- New target market: An article entitled "Zimbabwe woos new Asian tourists" appeared in the UK edition of the BBC News. The article describes how traditional markets in Europe, particularly the UK have collapsed amid security fears, which has prompted the ZTA to explore the previously untapped Asian market. The local airline was expected to introduce flights to that region in an effort to boost arrivals figures (Internet 21).
- Airlines withdrawal from Harare International Airport: This article cited foreign currency shortages, high landing fees, and the current political instability as having forced a number of international airlines to stop landing at Harare International Airport. This negatively impacted on tourist arrivals (Internet 22).
- Loss of tourists to neighbouring Zambia: An article entitled "ZNTB benefits from Zimbabwe disturbances" appeared in the Times of Zambia. The article explains how confusion in Zimbabwe has given Zambia an advantage over the exploitation of the Victoria Falls. This was evidenced by a marked increase in the number of tourists viewing the falls from the Zambian side (Internet 23).

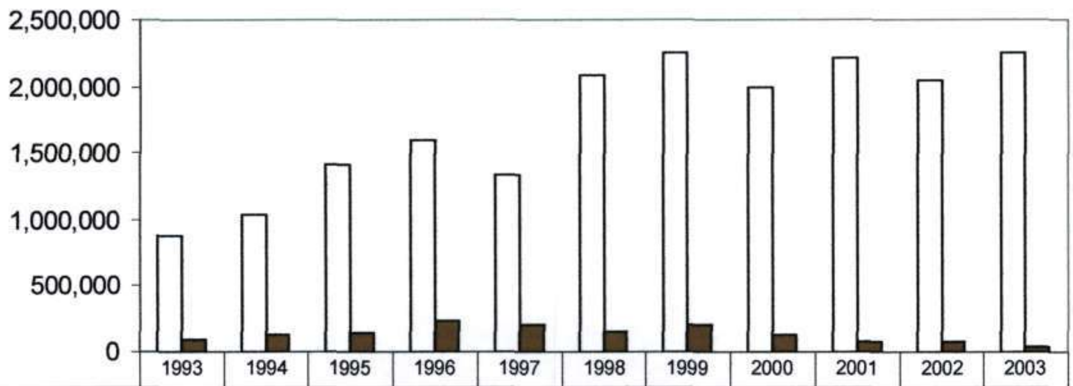
Today, the tourism sector has become an important source of revenue for many countries and Zimbabwe is not an exception. The government recognises this and is determined to make tourism one of the important pillars in the overall economic development of the country. This is evident by the Z$ 20 billion given to Civil Aviation Authority (CAAZ) to revamp the international airports, the Z$ 2.2 billion given to the developments within the Gonarezhou (GLTP transfrontier Park) and the opening of tourist offices in the new emerging markets mainly China, France and Malaysia among other initiatives.

In 2003, a total of 2 256 205 visitors visited Zimbabwe compared to 2 041 202 in 2002. This figure surpasses the 1999 arrivals when tourism was at its best. Of the total arrivals, 14% were from overseas markets. Key markets for Zimbabwe remained as UK, Germany, USA and South Africa. The growth of the European market by 13% surpassing the growth of the African market (10%) was very positive in light of the negative publicity the country has been receiving in this market. However, arrivals from UK, America and Australia continued declining as the hostility between these countries and Zimbabwe continue.

Arrivals from the Asian market continued increasing as the relationship between Zimbabwe and this market continue to improve. Arrivals from Asia increased by 40% from 29 075 in 2002 to the current 40 791 in 2003.The main contributors to the increase being Japan, India and China. China should be considered seriously to maximize on the recently awarded ADS (Approved Destination Status) to increase traffic flow to Zimbabwe.

Fig 2.8 shows the tourist arrivals and receipts accruing to Zimbabwe for the last decade. Although arrivals increased in 2003 compared to the previous year, the receipts decreased significantly. This can be explained by the fact that the arrivals figure captures all the arrivals to Zimbabwe and does not distinguish between people visiting for tourism purposes.

Fig 2.8 Zimbabwe Tourism Arrivals & Receipts (1993-2003)



	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003
Arrivals	879,501	1,039,01	1,415,53	1,596,69	1,335,58	2,087,40	2,249,61	1,996,58	2,217,42	2,041,20	2,256,20
Receipts (US$M)	$96,402	$124,698	$144,641	$231,797	$204,795	$158,459	$201,600	$124,700	$81,400	$75,700	$44,100

Source: ZTA Tourism Trends & Statistics 2003 Report - Research Department

Table 2.1 shows arrivals to the regions for countries that belong to the Regional Tourism Organisation of Southern Africa (RETOSA) for the period 1999 –2003. Zimbabwe ranked third in terms of market share within the region for the year 2003, however it was the worst performing with a decline in arrivals of nearly 50% compared to 2002.

Table 2.1 Regional Tourism Organisation of Southern Africa Arrivals (1999 - 2003)							
000s	1999	2000	2001	2002	2003*	% Change 2003/2002	RETOSA Market Share 2003
Angola	45	45	40	40	95	138%	0.7%
Botswana	799	863	915	920	1,300	41%	9.9%
DRC	53	55	58	55	140	155%	1.1%
Lesotho	186	231	258	262	269	3%	2.1%
Malawi	254	228	206	210	220	5%	1.7%
Mauritius	578	656	790	900	678	-25%	5.2%
Mozambique	45	55	50	55	60	9%	0.5%
Nambia	565	570	650	660	1,109	68%	8.5%
Seychelles	125	130	132	138	131	-5%	1.0%
South Africa	6,026	6,001	6,000	6,300	6,500	3%	49.6%
Swaziland	330	341	345	362	300	-17%	2.3%
Tanzania	585	603	580	650	595	-8%	4.5%
Zambia	456	574	596	640	659	3%	5.0%
Zimbabwe	2,103	1,868	2,100	2,040	1,040	-49%	7.9%
Total Arrivals	**12,150**	**12,220**	**12,720**	**13,232**	**13,096**	**-1%**	**100.0%**

* 2003 figures not yet finalised

Source: ZTA Tourism Trends & Statistics 2003 Report - Research Department

The receipts for RETOSA for the period 1999-2003 shown in Table 2.2 indicate that Zimbabwe's share of receipts in the region was a mere 1% last year, compared to 48% for neighbouring South Africa. Zimbabwe experienced a decline of 42% in receipts for 2003, whilst countries like Angola and the DRC improved by 67% and 50% respectively.

Table 2.2 Regional Tourism Organisation of Southern Africa Receipts (1999 - 2003)							
US$Million	1999	2000	2001	2002	2003*	% Change 2003/2002	RETOSA Market Share 2003
Angola	13	14	14	15	25	67%	0%
Botswana	234	256	270	295	330	12%	6%
DRC	2	2	2	2	3	50%	0%
Lesotho	19	19	18	19	20	5%	0%
Malawi	20	27	33	40	35	-13%	1%
Mauritius	545	585	627	672	690	3%	12%
Mozambique**							
Nambia	298	308	310	321	316	-2%	5%
Seychelles	112	110	110	112	113	1%	2%
South Africa	2,526	2,526	2,500	2,550	2,800	10%	48%
Swaziland	35	35	34	35	36	3%	1%
Tanzania	733	938	1,200	1,537	1,250	-19%	22%
Zambia	85	91	102	114	122	7%	2%
Zimbabwe	202	125	81	76	44	-42%	1%
Total Receipts	**4,824**	**5,036**	**5,301**	**5,788**	**5,784**	**-0.1%**	**100%**

* 2003 figures not yet finalised

**Figures for Mozambique unavailable

Source: ZTA Tourism Trends & Statistics 2003 Report - Research Department

Tourist arrivals into Zimbabwe, originating from the overseas and regional markets for the period 1999 to 2003 are shown in Table 2.3. The Netherlands, South Africa, the UK and Ireland exhibited the greatest decline in tourists coming to Zimbabwe in 2003. Tourist arrivals from Switzerland were very encouraging, increasing by 46% compared to 2002. Although there was a significant increase in tourists from Zambia and Mozambique, they would have very little impact on receipts for the local tourism industry because or their weak currencies.

Table 2.3 Tourist Arrivals Overseas & Regional Markets (1999 - 2003)

000s	1999	2000	2001	2002	2003*	% Change 2003/2002
Overseas Market:						
UK & Ireland	190,642	136,808	156,519	77,262	58,354	-24%
Germany	66,084	33,379	32,694	21,333	25,902	21%
Netherlands	39,606	23,430	23,925	17,465	12,928	-26%
Switzerland	24,726	11,799	11,806	5,657	8,285	46%
Other Europe	59,055	66,154	40,292	28,278	**	
USA & Canada	101,445	79,941	91,714	55,180	54,572	-1%
Other America	14,664	37,591	20,013	10,014	**	
Australia & N Zealand	65,281	56,631	76,519	36,841	40,141	9%
Asia	35,507	24,047	26,761	29,075	40,791	40%
Total Overseas Market	**597,010**	**469,780**	**480,243**	**281,105**	**240,973**	-14%
Regional Market:						
South Africa	598,051	848,963	675,500	1,183,064	882,726	-25%
Zambia	676,696	409,532	786,839	224,302	295,103	32%
Mozambique	215,948	117,735	191,392	242,154	313,954	30%
East Africa	41,334	36,551	28,959	28,142	**	
Other Africa	120,576	84,021	54,496	82,435	**	
Total Regional Market	**1,652,605**	**1,496,802**	**1,737,186**	**1,760,097**	**1,491,783**	-15%

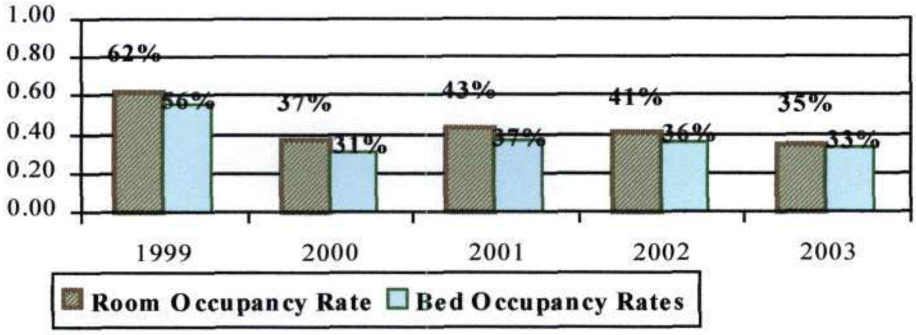
* 2003 figures not yet finalised

** These markets cannot be compared with previous years as the have been split in 2003

Source: ZTA Tourism Trends & Statistics 2003 Report - Research Department

Fig 2.9 shows the level of facility utilization at the Victoria Falls resort town is shown by the room and bed occupancy rates for the period 1999 to 2003. There has been a steady downward decline over the years; this is reflected in excess capacity, with only 35% of the rooms and only 33% of the available beds being utilized.

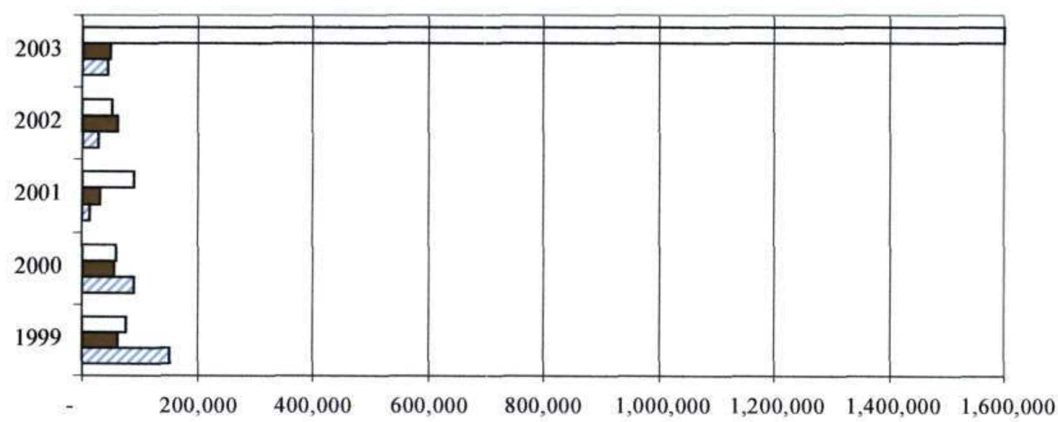
Fig 2.9 Victoria Fall Facility Utilization :
Room & Bed Occupancy Rates (1999 - 2003)



Source: ZTA Tourism Trends & Statistics 2003 Report - Research Department

The Rainforest is a key attraction at the Victoria Falls resort town. Fig 2.10 shows that fewer locals visited the rainforest in 2003 compared with 2002. Foreign arrivals increased from 26,612 to 46,641 for the same period, but as these are not split into the various source markets as in Table 2.3, it is not possible to determine the countries of origin of the visitors to the Rainforest. It is interesting to note that there was a phenomenal increase in local currency receipts from visitors to the Rainforest.

Fig 2.10 Arrivals & Receipts Rainforest (1999-2003)



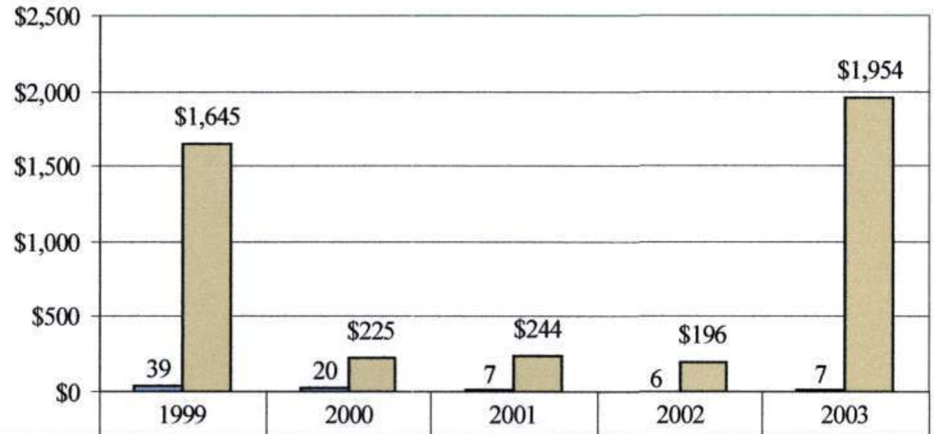
	1999	2000	2001	2002	2003
Z$millions	75,500	59,479	89,465	51,693	1,599,245
Local arrivals	63,413	56,955	32,738	61,486	47,350
Foreigners arrivals	152,814	90,831	14,787	26,612	46,641

Source: ZTA Tourism Trends & Statistics 2003 Report - Research Department

The level of investment in the Zimbabwean tourism industry in local currency is depicted in Fig 2.11 for the period 1999 to 2003. The greatest investment was in year

2003, with almost a ten-fold increase compared to the previous year. It is evident that the only a handful of projects investments have been embarked upon over the last three years.

Fig 2.11 Tourism Investments (1999-2003)



	1999	2000	2001	2002	2003
Number of projects	39	20	7	6	7
Z$millions	$1,645	$225	$244	$196	$1,954

Source: ZTA Tourism Trends & Statistics 2003 Report - Research Department

2.9 Summary

The ZTA needs to undertake a thorough analysis of the environment in which the tourism industry is operating, as there are many variables to consider. In addition the strategies of competitors should be examined for possible co-operative arrangements, whilst taking cognizance of the consumer's needs. The successful repositioning of the Zimbabwean tourism industry will depend on effective segmentation and targeting of the various source markets. Actionable insights are required to solve the crisis in the tourism industry can only be gained by conducting the research, following the methodology described in the next Chapter.

-CHAPTER THREE-

METHODOLOGY OF THE TOURIST AND TRADE SURVEYS

3.1 Introduction

This chapter serves to describe and justify the methodology used to achieve the research objectives of this study. This section will begin by reiterating the problem statement and the objectives of the study, followed by a brief description of the geographic area where the study was conducted. The literature search technique will then be highlighted, prior to discussing the research design. Next, details of the sampling design will be addressed. Instrumentation, data collection, data analysis, sources of error and limitations will also be discussed.

3.2 Problem statement

"What actions need to be taken to reverse the negative trend in tourist arrivals at Victoria Falls, thereby boosting the country's foreign exchange earnings?"

3.3 Objectives of the study

These were to:

- 3.3.1 To establish the trends in tourist arrivals with respect to volumes, mode of transport, and tourism receipts.
- 3.3.1 Identify issues that support or hinder development or reorientation of tourism products in the public and private sectors
- 3.3.2 Review current and past marketing strategies, their successes and shortcomings.
- 3.3.3 Assess likelihood of current tourists in recommending the Victoria Falls to others in their home countries.

3.4 Geographic coverage

The survey was restricted to the Victoria Falls resort town. Initially, for budgetary considerations, the plan was to conduct the survey in Harare as it is the capital city and one is bound to locate international travellers. However, it was later envisaged that costly and extensive screening would have to be conducted to firstly locate a respondent who met the criteria of being an international traveller, and in addition, also have visited the Victoria Falls very recently. Another draw back of this approach would have been the limited recall of the Victoria Falls holiday experience owing to the passage of time between the holiday and the survey period. Although conducting the survey at a venue such as the Harare International Airport departure lounge for example would have minimized the problem of identifying suitable respondents, it would have eliminated those travellers not using air transportation, whilst still not solving the issue of recall and memory decay.

3.5 Research design

Newton and Rudestam (2001:77) point out that the design statement often presents difficulty, and determining the most appropriate "design description can be accomplished by reference to one of the many texts that describe designs." Cooper and Schindler (2003), in their Student CD-ROM, accompanying their text, define the research design as "the blue print for the collection, measurement and analysis of data. "

The survey was an interrogation/communication study involving the researcher questioning respondents. It was ex post facto since there was no control over the variables, or the ability to manipulate them. The descriptive nature of the study is clearly evident from the survey instrument, structured in order to elicit responses about how, *who*, *what*, *where*, or when, concerning the holiday experience at the Victoria Falls. Fieldwork was in the actual environmental setting i.e. whilst respondents were actually on holiday and members of the trade were actually working in the resort town. As the survey was performed as part of the requirements for fulfillment of the MBA program, it was cross-sectional, in that this study was carried out once to give a snapshot of a particular point, rather than being of a regular or continuous nature.

3.6 Sampling Design

Sampling is the process of selecting some elements from a population to represent the population as a whole. The population (Cooper & Schindler 2003:179) is the total selection of elements about which we wish to make some inferences.

After examining the study objectives, it was evident that information would have to be gathered from two sources:

- The international overseas visitor. The long haul international tourist, fulfilling the criteria of what the ZTA classifies as over seas markets, as opposed to regional or domestic tourists. The ZTA has chosen to use geography as a segmentation basis for determining their target markets. Also, ideally the target market should have been exposed to the marketing efforts of neighbouring South Africa and Zambia, with which Zimbabwe actively competes with in attracting visitors to the Victoria Falls.
- Stakeholders in the Zimbabwean tourism industry. This target group comprised operators registered with the ZTA, whose activities were directly linked to the Victoria Falls. They included decision-makers in the hospitality industry, travel agents and tour operators. The condition that the operators be currently registered with ZTA was meant to ensure that their organizations were conversant with ZTA's functions.

Several sampling designs, i.e. methods of drawing the sample, were available. The designs can be divided into probability and non-probability samples as illustrated in Cooper and Schindler (2003:184). Both surveys, i.e. the one restricted to the trade and the one restricted to the long haul international traveler, used a non-probability, purposive judgment sample. Thus, essentially, this was a non-random subjective procedure whereby elements were arbitrarily selected to conform to certain criterion highlighted above in respect to both target populations.

Probability sampling (simple or complex random), which is a controlled, randomised procedure that assures that each population element is given a known nonzero chance of selection (Cooper and Schindler 2003:184), was considered impractical. Probability sampling is technically more superior to non-probability sampling in that a random selection of elements would reduce or eliminate sampling bias that may distort the findings of the study. Given that tourists are only visiting and therefore only temporarily available, the following practical considerations discussed by Cooper and Schindler (2003:200), favoured the use of the less precise, non-probability alternative:

- Human element: even carefully stated random sampling procedures may be subject to careless application by the people involved, such that ideal probability sampling is only partially achieved
- Time and cost: probability sampling involves more planning and repeated callbacks to ensure that the desired respondent is successfully contacted. Efforts to contact the desired responded would invariably cause the researcher to incur additional costs, especially with respect to the planned accommodation expenses, each time an unsuccessful attempt is made.

Thus, in terms of feasibility: non-probability sampling may be the only practical alternative since the total population may not be available for study in certain cases. This is particularly applicable to this study, which targets visitors, as they are only available temporarily, just for the duration of their stay.

Prospective respondents were approached and screened by determining their address or country of origin. The town of Victoria Falls is very small and thus respondents for the traveller survey were easily intercepted at the Craft Village, on the street and in the lobbies of hotels and restaurants prior to getting permission from management in the various establishments. The countries of origin for the traveller respondents comprised the USA, UK, India, Hungary, Canada, Australia and China

Appointments were made with trade respondents at their respective offices. A letter of support from ZTA head office in Harare was obtained in order to facilitate respondent's willingness to participate in the survey and clarify the objectives of the study.

3.7 Data collection instrument

In constructing and refining the survey instrument, the guidelines suggested by Cooper & Schindler (2003: 354-397) were incorporated.

- **Question Content**: An attempt was made to ensure that purposeful questions, leading to responses that contribute significant information towards the research question, were included. Scope and coverage of the questions was also designed with the problem statement in mind. Double barrel questions were separated to avoid ambiguity. The international traveler questionnaire was targeted at respondents able to make decisions regarding the tourist destination. The trade questionnaire was targeted at decision makers and those who directly interfaced with the ZTA and were familiar with its operations.

- **Question wording:** The vocabulary used was kept simple and fortunately this study did not require use of jargon in eliciting information about traveler's holiday experience. It was envisaged that members of the trade, whose organizations were registered with the ZTA, should have been familiar with the authority's functions and thus should have been adequately prepared to answer the questions listed. The researcher avoided words with multiple meanings where possible.

- **Response strategy**: The nature of the topic being studied, the type of data required and the characteristics of the respondents, necessitated a combination of response strategies. Thus the trade questionnaire was comprised of open-ended or unstructured questions and those requiring a rating response. This questionnaire was based purely on the functions of ZTA, which are available in their brochures and on their website. The traveler questionnaire was more detailed and additionally included dichotomous selection, multiple choice, checklists and ranking.

It is important to note that for each questionnaire, the purpose of the survey highlighted, as well as the fact that "sponsor" or researcher was an MBA student with the University of Kwazulu-Natal. To ensure respondent co-operation, it was brought to the respondent's attention that participation was voluntary and that the study was confidential. Where respondents were approached in a business establishment, they were made aware that management permission had been sought to conduct the interviews. Respondents intercepted on the street were provided with the interviewer's identification particulars.

Trade respondents were also provided with a cover letter from ZTA head office in Harare, and in addition, staff at the Victoria Falls branch assisted in setting up appointments.

Each questionnaire will now be discussed briefly.

3.7.1 The International Tourist Questionnaire: (Appendix II)

This began by asking about tourists' awareness of the Victoria Falls, followed by questions that investigated the motivation for visiting tourist resorts in general. Next, those respondents who were found to have had the opportunity to view the Victoria Falls from the Zambian side as opposed to Zimbabwe, where asked to compare the two view points and explain their preference. South Africa is another country in the region that actively promotes the Victoria Falls. Respondents were asked to associate various factors or attributes with South Africa, Zambia and Zimbabwe and describe each country's marketing efforts. Respondents were asked to indicate which activities they had engaged in during their stay at Victoria Falls.

These questions were intended to assist the ZTA in coming up with future marketing strategies. The organization would be in a position to see the preferred media vehicles, rate the local marketing efforts against those of neighbouring countries. The activities questions were intended to highlight the preferred leisure activities the authority could sell to prospective holidaymakers.

Next, respondents were asked about their mode of travel to the resort town. This was relevant in that Zimbabwe has experienced fuel shortages that have negatively impacted on road travel. Questions pertaining to duration of visits were meant to find out whether visitors were there just for the day, or staying longer. This is very important in that the former groups provide very little revenue to our economy and thus marketing campaigns need to focus on encouraging visitors to extend their stay. Subsequent questions concerning future plans to visit the resort were intended to probe reasons for those planning on returning, as well as those not planning to do so.

Questions regarding advance planning would indicate to the ZTA when they can expect their marketing efforts to yield results i.e. impact on arrivals figures. This would assist in advance planning for themed package holidays. An example would be when to time the implementation of tactical promotions, say for the Christmas period.

The questionnaire then went on to assess visitors perceptions of local businesses i.e. accommodation facilities and local restaurants as well as specific local attractions or activities. Asking for suggestions to improve the Victoria Falls area further enhanced the value of this section.

Lastly, in effort to get a profile of the tourists, respondents were asked questions about the people accompanying the respondent on their visit, their age and profession. Questions pertaining to income had been included initially but were later omitted when it appeared there was no justification, given that the long haul traveler can afford to holiday in Zimbabwe, given our currency is much weaker than those of countries in overseas markets.

3.7.2 The Tourism Industry (Trade) Questionnaire: (Appendix IV)

This questionnaire was merely an adaptation of the functions of the ZTA. The intention was to investigate how far the trade perceives the organization in adequately fulfilling its mandate.

3.8 Data collection

The data collection exercise was carried out in the second week of May 2004. The geographical location was the Victoria Falls town. A total of 60 questionnaires were used, split 2:1 for the tourists and trade respectively. The communication approach used was that of personal interviews, i.e. a face-to-face situation. The researcher could also have employed telephone interviews or self-administered surveys. All these approaches have their merits as well as disadvantages.

For this study, the personal interview option was selected mainly because:

- Geographically, the sample was easily accessible in the small resort town.
- The interviewer could screen out undesirable participants at the very start of the survey, by simply asking for their country of origin, or the position within the organization for the respective survey.
- The survey instrument included visual aids in the form of show cards for selecting responses. Their use warranted the need for an interviewer presenting them to the respondent at the appropriate question.
- The personal interviews also afforded the researcher the opportunity to probe and clarify any inconsistencies during the interviews, as follow-ups would not be feasible for those travellers who had already departed form the resort town.
- It is generally accepted that this method ensures good (Cooper & Schindler 2003:324) co-operation from respondents.

This method however, is not without disadvantages, the most important one being interviewer bias, which will be discussed in the sources of error section below.

Telephonic and self-administered interviews would have necessitated approaching the front desk of hotels and lodges to identify any suitable respondents and then call them in their rooms or slip questionnaires under their doors for completion. This would probably have been perceived as invasion of privacy. In addition, a very low response could occur since the chances of finding respondents merely sitting in their hotel room would be low, given the multiplicity of outdoor activities available at the Victoria Falls. Both these approaches would have increased the study costs in terms of telephone calls and collection of the completed surveys. In addition, for self-administered surveys, the interviewer would be unable to gauge the response rate until the actual time of collection.

3.9 Data analysis

The data collected via the survey instrument underwent data preparation. This is thoroughly discussed in Cooper and Schindler (2003) chapter 15 and it entailed:

- Editing of the raw data to detect errors and omissions so as to ensure accuracy, consistency, completeness, that is was uniformly entered and lastly arranged to simplify coding and tabulation.
- The questionnaires were then coded to allow the researcher to reduce a multitude of replies to a few categories containing critical information needed for analysis.
- Once coding was completed, data entry followed, using Statistical Package for Social Sciences (SPSS).

The SPSS package enabled the researcher to perform statistical analyses such as frequencies and means. The chi-square test was applied to selected questions following the method given in Cooper & Schindler (2003:537).

3.10 Sources of Error

An ideal study should be controlled for precise and unambiguous measurement of variables. Errors invariably occur and they may be classified as systematic, resulting from bias, while the remainder is random, occurring erratically. Cooper & Schindler 2003:229) discuss the following major possible sources of error that should be borne in mind:

- Sampling error: This is an indication of the influences of chance in drawing the sample from the population. This is not applicable to this study as the sampling design was based on random probability, but rather, non-probability purposive judgment.
- The respondent: Despite assurances of the survey being confidential, respondents may still be unwilling to express strong negative or positive responses. Furthermore, they may be unaware that a problem, which warranted the execution of the survey, exists at all. In addition, respondents could have been suffering form from fatigue, boredom or other factors that may affect their ability to devote undivided attention to the survey questions.
- The data collection instrument: although pilot tested, it was not possible to rule out the likelihood of different respondents making their own interpretation of what is required. Furthermore, an attempt was made to keep questions short

and simple, coupled with the use of show cards to facilitate responses where appropriate.

- Situational factors: In this study, these included whether the traveler had booked their holiday directly, or via external tour operators. The latter, to ensure any future holidays are booked through them, would in all likelihood paint a negative picture of local operators, thereby taking advantage of the adverse perceptions currently affecting Zimbabwe's image as a tourist destination of choice. Other factors included the presence of other members of the group, which is more pronounced in the case of respondents from the Asian markets as they typical opt for group tours.
- The interviewer: can introduce bias in various ways, including paraphrasing, voice inflection and facial expressions. An attempt was made to reduce this source of error by thoroughly briefing the research assistant prior to fieldwork. The same person completed all interviews, in order to eliminate distortions emanating from differences in interviewer style.

3.11 Limitations

- Due to the prohibitive accommodation costs in the resort town, the interviewing period had to be compressed into three full days, with interviews starting early in the day and finishing in the early hours of the evening.
- Due to the small sample available for the study, owing to low numbers of international tourists at the resort town, results may not be generalizable beyond the specific population from which the sample was drawn.
- Due to the possibility failure of sample respondents to answer with candor, in critiquing he ZTA, results might not accurately reflect the opinions of all members of the included population.

3.12 Summary

The preceding discussion of the research design was dealt with in sufficient detail to enable replication of the survey. The sources of error and limitations inherent in the study were also highlighted. These should be borne in mind when studying the reporting and discussion of results of the survey, which follow in Chapter Four.

- CHAPTER FOUR -

REPORTING AND DISCUSSION OF RESULTS OF THE TOURIST AND TRADE SURVEYS

4.1 Introduction

This chapter looks at the key results from the two-part survey. The first part looks at the findings from the international tourist, followed by a discussion of how the players in the Zimbabwean tourism industry perceive the performance of the ZTA. Whilst this section provides as much detail as possible, more data is in the detailed statistical Tables in Appendix V. The tables will provide additional information from a variety of perspectives, such as by respondent country of origin, and gender for the tourists, and mean scores for the performance ratings by the trade. Analysis by country of origin is particularly important, as ZTA has adopted geographic location as their segmentation basis for their target markets.

4.2 International Tourist Survey Findings

The following is a discussion of the responses elicited from the international tourists.

4.2.1 Sources of information abut the Victoria Falls

The study established that half of the respondents sampled had first come to know about the Victoria Falls through their friends or relatives. A significant number (35%) stated that they had heard from travel agents while a total of 23% indicated that the Falls had come to their attention through magazines and newspapers. A few had cited the Internet (10%) and maps (5%). Very few cited word of mouth (from people other than friends or family), as their initial sources of information about the Victoria Falls. Family and friends particularly played a significant part in creating awareness for the resort amongst U K and American (100% and 78% respectively). Tourists from China and Canada relied mainly on travel agents, whilst those from India were very dependent on magazine or newspaper articles.

Whilst they were considering the Victoria Falls as a possible holiday destination and conducting a more detailed information search about the resort, the majority (60%)

indicated that tour guides or travel agents had contributed most to their decision. Newspapers and magazines (33%) were also said to have been very prominent in providing information about the resort. Tourists form the traditional source markets, namely the USA (56%), Australia (80%) and Canada (80%) actually used travel agents as their leading information source in their decision-making. Those from the UK (83%) relied heavily on the press, followed by word of mouth and lastly travel agents.

4.2.2 Motivating factors influencing destination choice.

Respondents were asked to identify the key factors that are important to them deciding their choice of destination. A point system was adopted and a scale of 1-4 used where

- 1 = Not at all important
- 2 = Not very important
- 3 = Slightly important
- 4 = Very important

The greater the resultant mean score was above 2.00, the more important the factor was in influencing the tourist in their decision to go on holiday. On the other hand, the lower the resultant mean score below 2.00, the less important the factor was in influencing the choice of destination. Responses to each of the key aspects yielded mean scores as tabulated in Table 4.1 shows results by geographic origin and Tables 4.2 exhibits results by gender.

Both tables show that the most important motivating factor when tourists decide on destinations is 'visiting places important in history' (mean 3.88). This aspect is particularly important for the male tourists compared to their female counterparts (3.90 and 3.80 respectively). Second most important consideration was found to be 'experiencing new and different life styles' and 'learning new outdoor skills' (both 3.65).

The least important consideration was said to be 'taking advantage of reduced fares' (mean 2.23) implying that for the tourists decisions are not made on financial basis but on other non monetary factors. 'Doing nothing at all' (2.78), 'visiting friends and relatives' (2.73) and 'trying new foods' (2.78) were also lowly rated as motivators in destination selection decisions.

Table 4.1 Mean Scores for Motivating Factors by Country Of Origin

Motivating Factor	Overall Mean Score	Highest Country Mean	Lowest Country Mean
Visiting places important in history	3.88	USA & Australia (4.00)	India & Hungary (3.75)
Experiencing new and different lifestyles	3.65	India (4.00)	UK (3.33)
Learning new outdoor skills	3.65	India (4.00)	China (3.43)
Finding thrills and excitement	3.60	Australia (3.80)	India (2.75)
Being physically active	3.55	Hungary (4.00)	India (2.75)
Travelling to places where I feel safe and secure	3.38	India (3.75)	Hungary (2.75)
Getting a change from a busy work schedule	3.33	Hungary (3.75)	China (2.71)
Being daring and adventuresome	3.33	UK (3.67)	Hungary (2.75)
Going places my friends haven't been	3.30	China (3.57)	Canada, India & Hungary (3.00)
Participating in sports	3.25	India (3.75)	Canada (2.20)
Getting away from demands of home	3.23	Australia (3.80)	India (2.50)
Having fun being entertained	3.00	(UK 3.50)	India (2.4)
Seeing as much as possible in the time available	3.00	(USA 3.44)	UK & Hungary (2.5)
Rediscovering myself	3.00	Canada (3.40)	India (2.50)
Talking about the trip after I return home	2.90	Hungary (3.50)	Canada (2.00)
Visiting places my family originated from	2.85	(USA 3.44)	India (2.50)
Trying new foods	2.78	Canada (3.60)	India (1.75)
Doing nothing at all	2.78	India (3.5)	China (2.14)
Visiting friends and relatives	2.73	UK (3.17)	India (2.25)
Taking advantage of reduced fares	2.23	Hungary (3.00)	UK (1.83)

Table 4.2 Mean Scores for Motivating Factors by Gender			
Motivating Factor	Overall Mean Score	Male Tourist Mean	Female Tourist Mean
Visiting places important in history	3.88	3.90	3.80
Experiencing new and different lifestyles	3.65	3.63	3.70
Learning new outdoor skills	3.65	3.70	3.50
Finding thrills and excitement	3.60	3.60	3.60
Being physically active	3.55	3.47	3.80
Travelling to places where I feel safe and secure	3.38	3.53	2.90
Getting a change from a busy work schedule	3.33	3.27	3.50
Being daring and adventuresome	3.33	3.37	3.20
Going places my friends haven't been	3.30	3.23	3.50
Participating in sports	3.25	3.37	2.90
Getting away from demands of home	3.23	3.33	2.90
Having fun being entertained	3.00	3.00	3.00
Seeing as much as possible in the time available	3.00	3.00	3.00
Rediscovering myself	3.00	2.93	3.20
Talking about the trip after I return home	2.90	2.97	2.70
Visiting places my family originated from	2.85	2.97	2.50
Trying new foods	2.78	2.73	2.90
Doing nothing at all	2.78	2.77	2.80
Visiting friends and relatives	2.73	2.93	2.10
Taking advantage of reduced fares	2.23	2.14	2.50

The following motivating factors were selected for Chi-square analysis and the results appear in tables 4.3, 4.4 and 4.5:

- Visiting important places in history
- Travelling to places I feel safe and secure
- Taking advantage of reduced rates

Table 4.3: Importance of visiting places important in history (Question 3d)

Hypothesis statement: Null hypothesis: H_o: $f_o = f_e$ i.e. all international tourists consider visiting important places in history very important.

Alternate hypothesis H_a: f_o **not** = f_e i.e. not all international tourists consider visiting important places in history very important.

Country of Origin	Rated "Very important"	Number Interviewed	% Interviewed	Expected Frequencies	Formula
	f_o			f_e	$(f_o - f_e)^2 / f_e$
China	6	7	18	3	4.339
USA	9	9	23	3	9.375
Hungary	3	4	10	2	1.500
India	3	4	10	2	1.500
England	5	6	15	2	3.361
Australia	5	5	13	2	5.208
Canada	4	5	13	2	2.408
Total	**35**	**40**	**100**	**15**	
			$\chi^2 = \Sigma (f_o - f_e)^2 / f_e$	=	27.692

Calculated Chi-Square =	27.692
d.f. (7-1)(2-1) =	6
Level of significance selected:	0.05
Critical Value	5.99

Interpretation: the calculated value is greater than the critical value, thus the null hypothesis is rejected.

Table 4.4: Importance of travelling to places I feel safe and secure (Question 3j)

Hypothesis statement: Null hypothesis: H_o: $f_o = f_e$ i.e. all international tourists consider travelling to places I feel safe and secure very important in influencing destination choice. Alternate hypothesis H_a: f_o **not** = f_e i.e. not all international tourists consider travelling to places I feel safe and secure very important in influencing destination choice.

Country of Origin	Rated "Not at all important"	Number Interviewed	% Interviewed	Expected Frequencies	Formula
	f_o			f_e	$(f_o - f_e)^2 / f_e$
China	6	7	18	3	4.339
USA	6	9	23	3	2.042
Hungary	1	4	10	2	0.167
India	3	4	10	2	1.500
England	3	6	15	2	0.250
Australia	3	5	13	2	0.675
Canada	2	5	13	2	0.008
Total	**24**	**40**	**100**	**15**	
			$\chi^2 = \Sigma (f_o - f_e)^2 / f_e$	=	8.981

Calculated Chi-Square =	8.981
d.f. (7-1)(2-1) =	6
Level of significance selected:	0.05
Critical Value	5.99

Interpretation: the calculated value is greater than the critical value, thus the null hypothesis is rejected

Table 4.5: Importance of taking advantage of reduced rates (Question 3t)

Hypothesis statement: Null hypothesis: H_o: $f_o = f_e$ i.e. all international tourists consider taking advantage of reduced rates not at all important.

Alternate hypothesis H_a: f_o **not** = f_e i.e. not all international tourists consider taking advantage of reduced rates not at all important

Country of Origin	Rated "Not at all important"	Number Interviewed	% Interviewed	Expected Frequencies	Formula
	f_o			f_e	$(f_o - f_e)^2 / f_e$
China	2	7	18	3	0.149
USA	5	9	23	3	0.782
Hungary	1	4	10	2	0.167
India	2	4	10	2	0.167
England	3	6	15	2	0.250
Australia	2	5	13	2	0.008
Canada	0	5	13	2	1.875
Total	**15**	**40**	**100**	**15**	

$$\chi^2 = \Sigma (f_o - f_e)^2 / f_e = 3.398$$

Calculated Chi-Square =	3.398
d.f. (7-1)(2-1) =	**6**
Level of significance selected:	0.05
Critical Value	5.99

Interpretation: the calculated value is less than the critical value, thus the null hypothesis is accepted

4.2.3 Competitive Comparison of Zambian and Zimbabwean viewpoints.

A significant number of respondents (53%) indicated that besides viewing the Victoria Falls from Zimbabwe, they had also at one time used the Zambian side for this purpose.

A total of 50% of the respondents indicated that they were undecided as to which was the better viewpoint, Zambia or Zimbabwe. Some 20% indicated a clear preference for the Zambian side compared to only 15% favouring the Zimbabwean viewpoint. The remaining 15% of respondents felt both sides were equally good. When analysed by country of origin, it was found that for Chinese, American, Indian and Canadian tourists were largely undecided as to which country provided the better viewpoint. Hungarians were the only tourists showing a clear preference for the Zimbabwean side (75%). Tourists from he UK were equally split as undecided (33%), preferred the Zambian side (33%) or felt both sides were equally good (33%). See Table 24 in Appendix V. Results by gender indicate that both males (47%) and females (60%) were largely undecided as to their preference for either country.

4.2.4 Competitive Comparison of South Africa, Zambian and Zimbabwe in the marketing of Victoria Falls

Respondents were asked to consider the marketing activities currently being executed by the three countries in marketing the resort, and were required to identify the country amongst the three that was performing best on a number of key operational factors. Zimbabwe was found to be the leading performer on fast service (75%), friendly staff (83%), good image and reputation (58%), welcoming reception and environment (70%), very informative about the destination (60%) wide product range / variety (75%), customer focused (70%)cost competitiveness (50%) and prompt follow up on requests (63%). However, Zimbabwe was perceived to be less technologically efficient (22.5%), operationally efficient (42.5%) and product focused (42.5%) compared to South Africa, which took the lead in all these categories. Competition appeared to be more intense between South Africa and Zimbabwe, with Zambia trailing on most attributes or not being considered at all.

These results clearly indicate that Zimbabwe has a far greater opportunity to market the Victoria Falls than its neighbouring competitors, South Africa and Zambia.

4.2.5 Main leisure activities

The research established that 'Flight of the angels', chartered flights directly over the stunning falls, was the leisure activity that most tourists engaged in (48%) particularly for the U K (83%), Americans (67%) and Australians (60%). White water rafting (43%) was another popular activity amongst these three nationalities. Canoeing, Safaris and Bunji Jumping off the Victoria Falls Bridge also featured prominently (38%).

Tourists from China indicated a preference for Elephant back safaris (71%), those form the USA enjoyed "Flight of the Angels" and Bunji Jumping the most. UK tourists were more inclined towards "Flight of the Angels" and White Water rafting.

4.2.6 Transportation Modes

While combinations of transport modes was used, air travel was found to be the main transport mode used by the tourists on their journey to the Victoria Falls (93%), followed by tour buses (75%).

4.2.7 Duration of Stay

In terms of nights planned for their stay in Victoria Falls, a third of the tourists (33%) had scheduled a 4-night stay. A total of 23% had planned to spend 3 nights while 20% had planned for 2 nights only. Some (17.5%) even planned to stay as long as 5 nights.

The Chinese (57%) generally spent 4 nights, as did the Americans (56%) and Australians (40%). Canadians (40%) spent three or five nights, whilst the Indian tourists planned a 2-night stay. Tourists from the UK by and large scheduled a 3-night visit.

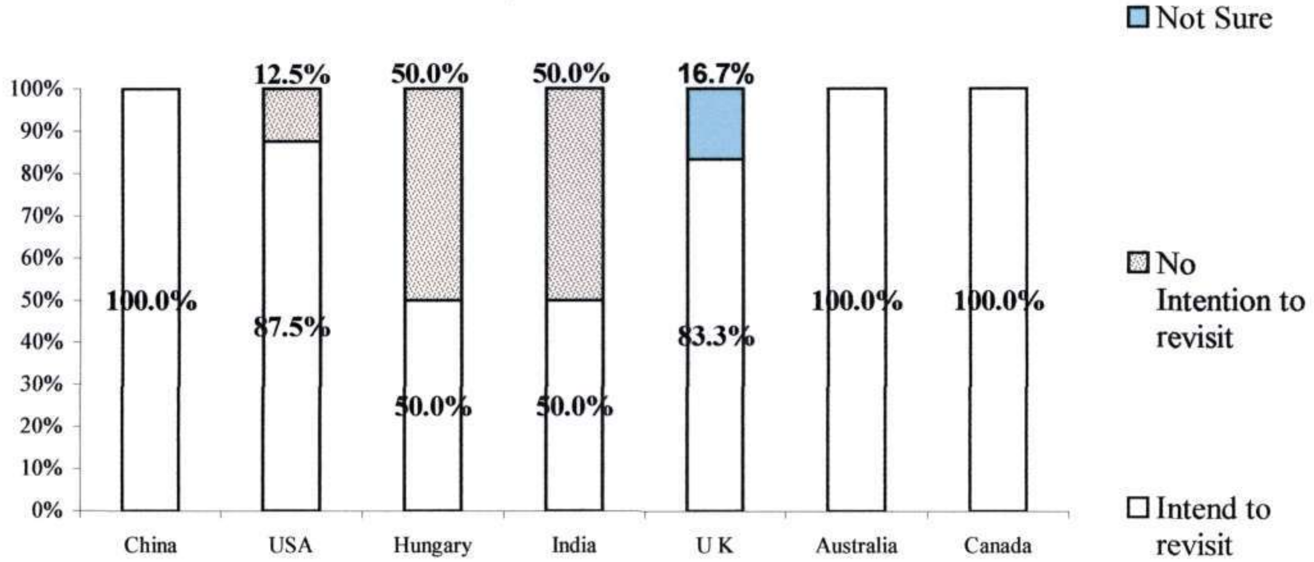
4.2.8 Past Visits to Victoria Falls

In the past two years a total of 85% said they had visited the Victoria Falls once before, while 8% said they had gone to the resort twice. A few (5%) had visited the fall three times in the past 2 years. Respondents from India and England exhibited the greatest propensity for multiple visits.

4.2.9 Intention to revisit the Victoria Falls

Most of the respondents (84%) had a positive outlook and said they would return to view the Victoria Falls again in the future. Tourists' responses pertaining to the likelihood of returning to the Victoria Falls in future are exhibited in Fig 4.1.

Fig 4.1 Intention to revisit the Victoria Falls



All the tourists from China, Australia and Canada indicated a definite intention to revisit the scenic wonder. Those from Hungary and India were equally split between those intending to revisit and those not planning to return. Although an overwhelming proportion of UK tourists (83.3%) planned to return, some indicated they were not sure of their intentions (16.7%). The proportion of American tourists intending to return (87.5%) far exceeded those not planning to do so (12.5%).

The main reason given for returning to the Victoria Falls was the beauty of the place

(31%) and others stating that they just felt like coming back (22%). Others said the atmosphere was good (16%) and the resort provided a place to satisfy the need for entertainment (13%).

Table 4.6 shows the results of Chi-square analysis performed on the respondent's intention to revisit the Victoria Falls.

Table 4.6: Intention to revisit the Victoria Falls (Question 11a)

Hypothesis statement: Null hypothesis: H_o: $f_o = f_e$ i.e. all international tourists intend to revisit the Victoria Falls.

Alternate hypothesis H_a: f_o **not** = f_e i.e. not all international tourists intend to revisit the Victoria Falls.

Country of Origin	Response :Yes	Number Interviewed	% Interviewed	Expected Frequencies	Formula
	f_o			f_e	$(f_o - f_e)^2 / f_e$
China	7	7	18	3	7.292
USA	7	9	23	3	3.894
Hungary	2	4	10	2	0.167
India	2	4	10	2	0.167
England	5	6	15	2	3.361
Australia	4	5	13	2	2.408
Canada	5	5	13	2	5.208
Total	**32**	**40**	**100**	**15**	

$$\chi^2 = \Sigma (f_o - f_e)^2 / f_e \quad = \quad 22.496$$

Calculated Chi-Square =	22.496
d.f. (7-1)(2-1) =	6
Level of significance selected:	0.05
Critical Value	5.99

Interpretation: the calculated value is greater than the critical value, thus the null hypothesis is rejected

4.2.10 Recommending the Victoria Falls as a holiday destination

In terms of recommending to family and relatives, all (100%) respondents said they would indeed tell their friends to visit the Victoria Falls, the main reasons being the 'goodness of the place' (33%), 'appropriate for all ages' (15%), the entertainment value (15%) and friendly staff (13%). It is worth noting that only 5% of respondents cited "it is money's worth" as a reason for recommending the Victoria Falls as a holiday destination.

4.2.11 Advance planning for the trip

Almost half of the sample (40%) had spent more than one month planning about the trip to Victoria Falls while 35% had spent more than 2 months on the planning. A few (15%) had taken 3-4 weeks to prepare. Generally, tourists from the USA (44%), Hungary (50%), India (50%), the UK (50%) spent more than one month planning for the trip. The Chinese (57%) and Australians (60%) devoted more time, spending more than two months finalizing their holiday arrangements. Canadians were split between taking more than one month and taking longer than two months (40% in each case.)

4.2.12 General impressions of Victoria Falls

Respondents were asked to give their ratings on key performance aspects with regard to their stay at the Victoria Falls. Three categories were rated as follows: accommodation (hotel/lodge), local restaurants, and finally local attractions/activities at the resort town. A point system was adopted and a scale of 1-5 used where:

- 1=Poor
- 2=Fair
- 3=Good
- 4=Very good
- 5=Excellent

The higher the mean score above the mid-point of 3.00, the more satisfied the tourists were on the specific aspect. On the other hand, the lower the mean score below 3.00

the less satisfied the tourists were. Responses to each of the key aspects yielded mean scores as tabulated in Tables 48, 49 and 50 in Appendix V.

The tourists were generally satisfied with the accommodation and eating facilities as well as the local attractions or activities available at the resort town. It is worth noting that the lowest mean score (3.50) was received for the availability of 'segregated smoking areas', indicating that these were not adequate. Surprisingly this was followed by the availability of 'unique gifts / souvenirs' (3.55), given that the town boasts of a large craft village as well as numerous commercial establishments trading in curios and other wares. However, all the respondents (100%) were impressed by the availability of goods and services and all indicated they had not failed to find anything that they needed during their stay at the resort.

4.2.13 Suggestions for improvement at the Victoria Falls

A number of suggestions were raised which were considered to be helpful in improving the Victoria Falls. See Table 52 in Appendix V. The main suggestions given were mostly to improve road signs (38%), provide maps to the areas (38%) and the need to clean up the town (38%). There were also calls for improving the quality of roads and the provision of better access to viewpoints. Some respondents felt there was a need to extend the opening hours of retail stores as well as increased police patrols.

4.2.14 Visitor profile

The respondents for the tourist survey came from the following countries: China, USA, Hungary, India, the UK, Australia and Canada. The male to female split was 3:1. Almost half of the respondents had come in twos to the resort while those coming as trios accounted for 30% of the respondents. With respect to occupation, almost a third of those interviewed were found to be in the administrative and executive positions (33%) while a total of 25% were in the professional/technical roles, 22% were in middle management, 15% were students and the rest (2%) were retirees.

4.3 Trade Survey Findings

The following is a discussion of the responses elicited from the trade.

4.3.1 Rating of ZTA's performance

The Zimbabwe Tourism Authority's vision is "to be the best national Tourist Organization in the world and position Zimbabwe as a world class tourist destination". Flowing from this is the organization's mission statement which is "to professionally market Zimbabwe as a leading tourist destination, set, and monitor standards, provide market research and statistics, and assist in creating and enabling environment, for the benefit of the nation and its visitors." Against this background, respondents in the trade were asked to rate the Authority's performance on the key functions of the organization.

Nine functions were rated. A point system was adopted and a scale of 1-5 used where:

- 1=Strongly disagree
- 2=Disagree
- 3=Neither Agree nor Disagree
- 4=Agree
- 5=Strongly Agree

The higher the mean score above the mid-point of 3.00 the more satisfied the members of the tourism industry that the organizations was fulfilling its mandate as prescribed in the wording of the function. On the other hand, the lower the mean score below 3.00 the less members of the trade felt that the organization was competently executing its functions.

Table 4.7 depicts the mean scores for each function, which have been ranked in descending order.

Table 4.7: Ratings of ZTA's performance: Trade questionnaire .	
Functions of the Zimbabwe Tourism Authority	**Mean score**
ZTA adequately "Promotes awareness in Zimbabwe of the benefits of tourism."	**3.9**
ZTA has "developed marketing skills and initiatives within the tourism industry."	**3.7**
ZTA has been successful in its efforts to "promote Zimbabwe as a tourist destination and promoting the tourist industry in overseas, regional and domestic markets."	**3.6**
ZTA continuously strives to "investigates and makes recommendations to the Ministry of Mines, Environments and Tourism on any matter affecting the tourist industry and the administration of the	**3.6**
ZTA has "promoted high standards in the tourism industry through the establishment of standards, training and human resource development."	**3.0**
The Authority has successfully "registered and graded designated tourism facilities."	**3.0**
The Authority adequately "promotes develops tourist facilities."	**3.0**
ZTA satisfactorily "plans for the tourism industry, including conducting market research and developing a tourism database."	**2.9**
The Authority "Promotes consultancy and advisory services in relation to tourism."	**2.9**

4.3.2 Trade suggestions pertaining to the Authority's functions

After rating the ZTA's performance, members of the tourism industry based in the resort town, were asked to give suggestions on how the ZTA *should* be carrying out its functions. This section of the survey was strictly qualitative and thus it is important to note that these were the sentiments of many individuals from an array of companies. These comprised hoteliers, restaurateurs, tour operators, travel agents, car hire firms and retailers to name a few. The responses are:

4.3.2.1 "Promote Zimbabwe as a tourist destination and promote the tourist industry in overseas, regional and domestic markets."

- "Advertise the Zambezi River and tourist activities on the website"
- "The current strategy is ok where ZTA has outside representatives"
- "Link their adverts with international standards"
- "Extensive marketing"
- "Revisit economic fundamentals"
- "Ensure safety for tourists"
- "Set up promoting offices in the outside countries"

The responses pertaining to outside representatives show that there is a lack of awareness by some members of the trade regarding the establishments of trade attaches by the ZTA.

4.3.2.2 "Develop marketing skills and initiatives within the tourism industry"

- "Getting partnerships with travel agencies"
- "Plan for more hospitality training schools"
- "Bring to attention of workers the importance of tourists"
- "Training of the staff"
- "They are not strong in marketing of tourism"
- "Reverse the tarnished image of Zimbabwe"

There appears to be a need for more training in the area of customer service, which will ultimately contribute to improving Zimbabwe's image.

4.3.2.3 "Promote high standards in the tourism industry through the establishment of standards, training and human resource development"

- "By training people who have tourism at heart"
- "Develop Standard Association for tourism"
- "Organizational targets"
- "Ensure tighter security"
- "Avoid government intervention"
- "The issue should be made public"
- "Use highly qualified staff"

This function is closely related to the preceding one. However, instead of calls to avoid government intervention, the trade should propose co-operative strategies.

4.3.2.4 " Register and grade designated tourism facilities"

- "Register with recognized institutions"
- "Put in place a statutory governing body"
- " Reduce the ministry powers"

The responses in this section of the survey were unclear, and warrant further study to enable the ZTA to gain a clear understanding of the trade's expectations regarding the registration and grading of tourism facilities.

4.3.2.5 "Promote the development of tourist facilities"

- "Develop particular areas"
- " Liaise with stakeholders and initiate programs that improve tourists facilities"

-"Include tourism on budget"

-"Avoid over collection of foreign currency from lodges and hotels"

-"They should not bias tourism adverts towards a leading hotel group (name supplied)"

-"Advertising"

The responses in this section of the survey were unclear. Further study is required to identify the areas the trade felt were under-developed. The calls for the inclusion of tourism in the budget were not understood as the Ministry of Mines Environment and Tourism.

4.3.2.6 " Plan for the tourism industry, including conducting market research and developing a tourism database."

-"Invite agents to see what we have"

-"Plan and implement SWOT analysis"

-" Use universities and other neutral sources for researches"

-" Bring the problems together and find agencies to do the job"

-"The current database is not providing accurate information"

-"Research should be carried out by tourism staff"

Further study is needed to ascertain the needs and inputs of the trade with respect to ZTA' s current marketing efforts. There appears to be limited understanding of the operations of the research department.

4.3.2.7 "Promote awareness in Zimbabwe of the benefits of tourism."

-"They should make it known to every country that something special is found in here"

-"Use other countries media sources"

-"Zimbabweans should be given a chance to see the benefits of tourism"

-"Use local media"

-"Advertising and school based projects"

-"Advertising should be done through print media"

The responses to this question were unclear as there was no mention as to strategies regarding promotion of the benefits of tourism.

4.3.2.8 "Promote consultancy and advisory services in relation to tourism"

-" Provide brochures to all airlines"

- " Deploy representing officers in different countries"

-" Create sources of information in all countries"

-"Institutions should be loyal to authorities"

-" Improve information technology"

The ZTA is already performing most of the recommendations given. The response "institutions should be loyal to authorities" bore no relevance to the question.

4.3.2.9 "Investigate and make recommendations to the Ministry of Mines, Environments and Tourism, regarding the tourism industry and the administration of the Tourism Act?"

-"Investigate on exchange rates and ensure safety of tourists"

-" SWOT analysis to check for micro and macro influences"

-"Reduce the activity of ministry on the institutions"

-"The authority should avoid strong intervention of government ministers"

There were repeated calls for minimizing government intervention, which appeared in responses to other questions above. Comments on the exchange rates on exchange rates need further exploration, as the local currency is already very weak compared to those of the overseas target market countries.

4.4 Summary

The responses from the international tourists were largely clear and easy to interpret. The results of the chi-square tests show that not all international tourists intend to revisit the falls. The fact that the Victoria Falls is a historical monument does not seem to have a bearing on destination selection, neither does the offer of reduced rates appeal to the target market. Surprisingly, chi-square analysis also indicated that safety was not a motivating factor.

The responses from the trade were often conflicting and filled with ambiguity. This clearly indicates a lack of unanimity both amongst the trade members themselves and towards the ZTA. Chapter Five therefore follows, with recommendations to address the shortcomings uncovered by the research.

- CHAPTER FIVE -

RECOMMENDATIONS AND CONCLUSIONS FOR THE ZIMBABWEAN TOURISM INDUSTRY

5.1 Introduction

This chapter looks at the recommendations this researcher is able to suggest given the findings in chapter four, gathered form the tourist and trade surveys. Chapter five will be structured in a similar manner to the findings chapter. The first part looks at the recommendations emanating from the findings derived from the international tourist survey. This will be followed by a recommendations based on the findings of the survey directed at members of the trade.

5.2 International Tourist Survey Recommendations

The following are recommendations based on the results of the international tourists questionnaire.

5.2.1 Sources of information abut the Victoria Falls

- It is evident that in conducting their information search, tourists rely on a variety of sources. These may be environmental, which include personal influences, and family or friends. The external search is reliant upon various marketing stimuli comprising magazines and newspaper articles as well as the actions of promotional bodies like travel agents in their home countries. The latter source is easier for the ZTA to target. It is therefore recommended that the ZTA liaise closely with international travel agents. These are key suppliers to the local tourism industry and are the first port of call for the international tourists. The provision free holidays for travel agents directing the most traffic to Zimbabwe could be used as incentives.

- The authority should ensure that literature in the form of brochures and flyers, magazines and maps are readily available for distribution by travel agents in the various source markets. This would be in addition to what the Authority already offers at its own foreign offices. A greater investment in the printing of promotional materials is therefore required.

- Zimbabwe has experienced negative publicity in the international press, to whom tourists are exposed. Negative articles are unfortunately firmly embedded in the tourist's memories, on which they invariably rely for internal information searches. It is therefore recommended that when negative publicity does arise, the authority should prepare editorials for publication in subsequent issues of the relevant magazine or newspaper. These would serve to present the facts and give explanations of how the negative scenario arose and also give corrective measures to be put in place to avoid similar occurrences. It is also recommended that the authority cite positive testimonials from tourists visiting at the time an incident occurred.

- Although this research indicates the limited use of the Internet by respondents interviewed, this researcher feels this is an opportunity not to be ignored. This stated against the backdrop of markets becoming more globally oriented and the rise of the use of e-commerce for communication decisions. It is recommended that the Authority further investigate the low usage of the Internet and by implication, its website. Thus issues requiring further exploration include:

    - Whether the website is designed with search engine optimization in mind, given that users typically explore only the first few sites on the search results.
    - Investigating the value of placing editorials on the organization's website to counter negative publicity and engage in interactive public relations. The creation of newsgroups, mailing lists, forums and bulletin boards would enable the authority to interact directly with potential tourists and address any concerns they may have whilst evaluating possible holiday destinations.
    - Investigate the best sites with which to hyperlink, thereby generating more traffic volume to the Authority's website.

5.2.2 Motivating factors influencing destination choice.

It is recommended that ZTA use the results of the motivation questions to come up with appropriate promotional messages or themes.

- The most important motivating factor when tourists decide on destinations was found to be 'visiting places important in history' (mean 3.88). This is something the Authority could capitalize on, given the history of the discovery of the Victoria Falls.
- Second most important consideration was found to be 'experiencing new and different life styles'. Promotional messages highlight the existence of the Crafts village can be developed as tourists could go and experience how the traditional way of life was like, in a typical Zimbabwean village many years ago.
- The third most important motivator, 'learning new outdoor skills', could be capitalized on by providing novelties in the form of caps or golf shirts with the caption: " I learnt to Kayak at the Victoria Falls", or " I have Bunji jumped at the Victoria Falls". High quality "certificates" for displaying at home on their return, could be issued to tourists at the end of a golfing session for example, depicting the attributes of the golf course. These would serve as promotional memoirs of the tourists visit to Victoria Falls.
- It is recommended that advertising messages steer clear of cheap or bargain holidays. These would probably only appeal to students or even backpackers. This category of international tourist is not likely to give a return on promotional investments as they probably have limited budgets. Thus non-monetary factors should be highlighted instead.
- ZTA, however ZTA needs to strike a balance regarding the emphasis placed on the various motivating factors. This is because the results of the chi-square indicate that although some factors may be relevant to some tourists, their importance varies. It is therefore recommended that motivational factors need to be further researched so that they can be incorporated in the ZTA's promotional messages.

5.2.3 Competitive Comparison of Zambian and Zimbabwean viewpoints.

A sizeable number of tourists were undecided as to which was the better side to view the falls. This implies that the falls lack a clear or distinct image or position in tourists' minds such that international travel agents are able to promote any side they wish. This means potential revenue is lost simply through travel agents channeling tourists via the Zambian, rather than the Zimbabwean side. The Zambian side represents a "substitute", to which tourists can easily switch. There two possible course of action the Authority can take. Firstly, in those countries where advertising regulations permit, it is recommended that comparative advertising be used to highlight the fact that Zimbabwe has a far better view of the Victoria Falls. To avoid appearing confrontational towards the Zambian, promotional messages could factually highlight statistics pertaining to the Victoria Falls on the Zimbabwean side. For example the number of accessible view sites available from the Zimbabwean Rain Forest could be compared against the Zambian side as well as leisure activities available locally. Another approach that could be used is that of collaborative or co-operative arrangements whereby the tourism authorities of both countries jointly market both viewing points of the Victoria Falls.

5.2.4 Competitive Comparison of South Africa, Zambian and Zimbabwe in the marketing of Victoria Falls

Zimbabwe scored highly on most factors, but was perceived to be less technologically efficient (22.5%), operationally efficient (42.5%) and product focused (42.5%) compared to South Africa, which took the lead in all these categories. It is therefore evident that despite having most of the fundamentals in place, Zimbabwe is still lagging behind other countries in the region. It is recommended that greater emphasis be placed on partnerships or collaborative initiatives as opposed to engaging in direct competition. This strategy could be more aggressively pursued under the auspices of RETOSA. In addition, further research could be used to investigate how to improve technological and operational efficiency as well as product focus.

5.2.5 Main leisure activities

This section may be closely linked to the motivational factors in selecting a holiday destination. It is therefore recommended that, in addition to the core product on offer, i.e. the falls themselves, tourists be made aware of the other leisure activities available. Thus inserts of other activities on offer may compliment images of the Victoria Falls.

5.2.6 Transportation Modes

Air travel was found to be the main transport mode used by the tourists on their journey to the Victoria Falls (93%), followed by tour buses (75%). Further research needs to explore why car rentals firms were not largely used as this represents a loss of potential revenue by way of rental fees.

5.2.7 Duration of Stay

It was encouraging to note that most visitors scheduled a minimum stay of two nights. However, efforts should be made to encourage longer visits not just to the Victoria Falls alone, but possibly arranging package tours including other tourist attractions throughout Zimbabwe. This will raise tourists' awareness of other places of interest within the country. This strategy has the added advantage of promoting sites that are not in direct competition with neighbouring countries as is the case with South Africa and Zambia, for the Victoria Falls.

5.2.8 Past & future visits and recommending the Victoria Falls to others

It is encouraging to note that despite the negative publicity, most tourists have returned or are planning to do so in the future. They also indicated that they would recommend the resort to others back home. These respondents represent an opportunity to develop promotional messages, to be used as testimonials. These should be designed to emphasize positive aspects of their visits that prompted their intention to return to the Victoria Falls as opposed to choosing other holiday destinations worldwide.

5.2.9 Advance planning for the trip

Given the great distance long haul travelers cover to reach destinations like the Victoria Falls from their home countries, it is to be expected that a lot of time will be devoted to preparing for the holiday. The length of time invested in the planning process is unfortunately such that during that time any environmental variable can occur which may negatively impact on the decision to come to Victoria Falls. It is therefore worthwhile exploring the time frames of the respective stages of the decision making process and investigating exactly what the competitive set is for Zimbabwe. This researcher therefore recommends the authority either conducts its own research or purchase reports of studies done elsewhere to gain actionable insights on the decision making or behaviour of the international tourist. It is recommended that reports of studies conducted for destinations with similar characteristics in terms of poor image be considered, as they would be more appropriate or practical.

5.2.10 General impressions and suggestions for improvement at the Victoria Falls

It is pleasing to note that the impressions of the resort were generally positive with only minor issues needing attention. The Authority should endeavour to work with the local town authority and ensure very strict compliance with high standards of cleanliness and quality of roads. Strategically placed maps, in the form of billboards or other outdoor signage clearly marked with arrows indicating "you are here", would greatly assist visitors unfamiliar with the resort town. The uniformed tourism police are in place, but given that calls for increased police patrols were highlighted, perhaps there is a need to increase their visibility.

5.3 Trade Survey Findings pertaining to ZTA's performance

The rankings of the performance rating for the authority were given in Fig 4.3. It appears that generally members of the trade were in agreement that the authority was carrying out its prescribed functions. Based on the rating scores, it appears that the functions needing most attention appear to be those pertaining to "planning for the tourism industry, including conducting market research and developing a tourism database" and " promoting consultancy and advisory services in relation to tourism". At quick review of the actual suggestions given for each function, in section 4.3.2 may be necessary at this point in order to refresh the readers' mind. This is because numerous suggestions were given, and some instances they were contradictory or lacked an actionable perspective.

Given that the aims of the trade and the ZTA should be aligned, it is recommended that a unified approach be taken to tackle the tourism problem and regain lost market share. Given the multitude of suggestions proposed in section 4.3.2, it appears that the overriding problem is that local tourism sector is divided and lacks cohesion. Calls for minimal government or ministerial intervention were unfortunately not backed up by any rationale. Some members identified the need to include tourism in the budget. This sector falls under the Ministry of Mines, Environment and Tourism and is invariably awarded an allocation in the national budget. Thus it is recommended that ZTA determine exactly what are the trade's concerns regarding the budget. There is a need to clarify whether the trade feels the allocation is insufficient or is its use is not being optimised.

5.4 Summary

In conclusion, it appears that there is a lack of a unified approach in the local tourism sector. This researcher feels there is a need for the ZTA to educate its member organization as to its limitations so that they are not perceived to fall short of expectations. It is therefore recommended that effective dialogue or communication is necessary between the industry players, both government and the private sectors.

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Appendix I: Glossary

For reasons of comparability and consistency the Zimbabwe Tourism Authority uses the following international definitions as given by World Tourism Organization.

Tourist: A visitor who stays at least one night in a collective or private accommodation in the country visited (Recommendations on Tourism Statistics – WTO/United Nations – 1993).

Visitor: Any person who travels to a country other than that in which he/she has his/her usual residence but outside his/her usual environment for a period not exceeding 12 months and whose main purpose of visit is other than the exercise of an activity remunerated from within the country visited (recommendations on Tourism Statistics - WTO/United Nations – 1993

Same – day visitor: A visitor who does not spend the night in a collective or private accommodation in the country visited.

Arrivals: All data refer to arrivals and not actual number of People traveling. One person visiting the same country several times during the year is counted each time as a new arrival. Likewise the same person visiting several countries during the same trip is counted each time as a new arrival.

Receipts: These figures exclude receipts for International transport.

Appendix II: International Tourist Questionnaire

GRADUATE SCHOOL OF BUSINESS
UNIVERSITY OF KWAZULU-NATAL

International Tourist Questionnaire

SURVEY STUDY TO IDENTIFY FACTORS WHICH MAY HELP TO REPOSITION THE VICTORIA FALLS AND IMPROVE TOURIST ARRIVALS.

May 2004

My name is Yvonne Mutyambizi, an MBA Third Year Student at the Graduate School of Business, University of Kwazulu-Natal. I am currently conducting a dissertation whose aim is to find out what can be done to reverse the decline in tourist arrivals at the Victoria Falls.

I would be most grateful if you could spare some time to answer this questionnaire. There are no wrong or right answers it is only your factual response that matters. All the information and views you give will be treated in strict confidence.

Participation in this study is voluntary. The results of the survey will remain strictly confidential. Although the descriptions and findings may be published, at no time will your name be used.

Thank you in advance for your time and co-operation.

Questionnaire number..Date...................

Name of enumerator....................................Signature..........................

The following information will be used only for follow-up purposes and clarification

Name of respondent:
Address / Country of Origin:
Gender:
Telephone:
Fax:
Email:

Please answer all of the following questions by ticking the appropriate responses.

1. How did you first come to know about the Victoria Falls? (Tick all that apply)

   1 through friends or family   4 through a magazine or newspaper ads
   2 through a travel agent   5 don't remember or are not sure
   3 other, please describe______________________________

2. Which of the following information sources did you actually use during your visit to the Victoria Falls: (tick all that apply)

   1 brochures, newsletters   4 maps
   2 books   5 tour guides
   3 other, please describe:______________________________

3. Now talking of tourist resorts in general, which factors are important in influencing your choice of destination?

		Importance			
Item	Factor	Very Important (4)	Slightly Important (3)	Not very important (2)	Not at all important (1)
a.	Getting away from demands of home				
b.	Experiencing new and different lifestyles				
c.	Trying new foods				
d.	Visiting places important in history				
e.	Finding thrills and excitement				
f.	Going places my friends haven't been				
g.	Talking about the trip after I return home				
h.	Participating in sports				
i.	Learning new outdoor skills				
j.	Travelling to places where I feel safe and secure				
k.	Having fun being entertained				
l.	Seeing as much as possible in the time available				
m.	Rediscovering myself				
n.	Visiting friends and relatives				
o.	Visiting places my family originated from				
p.	Being physically active				
q.	Getting a change from a busy work schedule				
r.	Being daring and adventuresome				
s.	Doing nothing at all				
t.	Taking advantage of reduced fares				

4. The Victoria Falls can be viewed from the Zimbabwean or the Zambian side. Have you had the opportunity to view the Victoria Falls from the Zambian side?

1 No 2 Yes

If yes, which did you prefer and why

____

____

5. The Victoria Falls is being marketed by South Africa, Zambia and Zimbabwe. Which of these countries do you associate most, with the factors listed below?

	Factors	South Africa	Zimbabwe	Zambia
Fast service	1	1	2	3
Friendly staff	2	1	2	3
Good image & reputation	3	1	2	3
Welcoming reception & environment	4	1	2	3
Very informative about the destination	5	1	2	3
Wide product range / activities	6	1	2	3
Prompt follow up on requests	7	1	2	3
Others (specify) ______________________	8	1	2	3

6. How best would you describe the way Zambia, South Africa and Zimbabwe market the Victoria Falls? (Tick the appropriate descriptor)

	Zambia	South Africa	Zimbabwe
Product focused			
Customer focused			
Innovative			
Technologically efficient			
Operationally efficient			
Cost competitive			

7. What were the main leisure activities that you engaged in during your stay at the Victoria Falls?

1 White Water Rafting
2 Fishing
3 Kayaking
4 Hiking
5 Canoeing
6 Micro Lighting
7 Safaris
8 Elephant Back Safaris
9 "Flight of the Angels"
10 Bunji Jumping
11 Sundowner Cruises
12 Golf
13 Horse Riding
14 Helicopter Flips
15 Other, please describe:______________________

8. Which of the following modes of transportation did you use during this trip?

1 Rental car
2 Air travel
3 Tour bus
4 Other, please describe: ______________

9. How much time did you actually spend or intend to spend at the Victoria Falls?

1. _____Days **2.**_____Nights

10. How many total visits (including this one) have you made to the Victoria Falls, in the past two years? _________ Trip(s).

11. Do you plan to return to the Victoria Falls? 1 Yes 2 No

Please explain why ____
____
____

12. Would you recommend the Victoria Falls as a holiday destination to family or friends? 1 Yes 2 No,

Please explain why :
____
____

13. How far in advance did you plan this trip to the Victoria Falls?

1 to 2 weeks	______1
3 to 4 weeks	______2
more than1 month	______3
more than 2 months	______4
Longer, specify	______5

14. Was there anything that you wanted to buy or do at the Victoria Falls that you could not find or do?

1 Yes 2 No

If yes, describe: ____

Local businesses would like to have your suggestions as to what they or the community can do to better serve your needs.

15. Please rate your experience at the hotel/lodge you were accommodated (circle the appropriate choice):

	excellent	very good	good	fair	poor
Choice/variety of facilities	5	4	3	2	1
Cleanliness	5	4	3	2	1
Decor/furnishings	5	4	3	2	1
Heating/cooling	5	4	3	2	1
Service	5	4	3	2	1
Value (quality for amount paid)	5	4	3	2	1

16. Please rate your experience at any of the local restaurants (circle the appropriate choice):

	excellent	very good	good	fair	poor
Choice/variety of food	5	4	3	2	1
Cleanliness	5	4	3	2	1
Decor/furnishings	5	4	3	2	1
Segregated smoking area	5	4	3	2	1
Service	5	4	3	2	1
Value (quality for amount paid)	5	4	3	2	1

17. How would you rate any of the local attractions/ activities at Victoria Falls?

	excellent	very good	good	fair	poor
Quality of displays/views	5	4	3	2	1
Entertainment value	5	4	3	2	1
Guides/Staff	5	4	3	2	1
Service	5	4	3	2	1
Accessibility (ease of locating)	5	4	3	2	1
Parking	5	4	3	2	1
Hours/days of operation	5	4	3	2	1
Availability of unique gifts / souvenir	5	4	3	2	1

18. Are these ratings for a specific attraction? 1 Yes 2 No

if yes, which attraction:______________________________

19. What suggestions do you have for improving the Victoria Falls as a key tourist destination (Tick all that apply)

1 improve road signs
2 keep stores open later
3 provide better access to viewpoints
4 improve how businesses treat customers
5 provide maps to the area
6 provide more police patrols
7 clean up town
8 other, please describe:

____
____
____
____
____
____

In order to enable us to create a profile of international visitors to the Victoria Falls, we would like to know some general questions about you:

20. Please indicate the number of members of the party you are traveling with that can be described as follows:

1. ____ total number in party
2. ____ spouse or significant other
3. ____ own children
4. ____ other relatives
5. _____ friends
6. _____ tour group members
7. _____ business associates
8. _____ other, please specify: ____________________

21. How many people in your party are:

12 years of age or younger? ______1
13 to19 years of age? ______2
20 to 35 years of age? ______3
36 to 59 years of age? ______4
60 years of age or older? ______5

22. What is your profession?

1 Professional Technical
2 iddle Management
3 Student
4 Administrative / Executive
5 Retired
6 Other, please specify______________

Thank-you once again for participating in this survey!

Appendix III: International Tourist Questionnaire Show Cards

Show card 1: Question 1: Tourist Survey

How did you first come to know about the Victoria Falls? (Tick all that apply)

Through friends or family	Through a travel agent
Through a magazine or newspaper ads	Don't remember or are not sure
Other, please specify	

Show card 2: Question 2: Tourist Survey

Which of the following information sources did you actually use during your visit to the Victoria Falls?

Brochures, newsletters	Maps
Books	Tour guides
Other, please describe	

Show card 3: Question 3: Tourist Survey

Importance of factor in influencing your choice of destination

Very Important	Slightly Important
Not very important	Not at all important

Show card 4: Question 7: Tourist Survey

What were the main leisure activities that you engaged in during your stay at the Victoria Falls?

White water rafting	Elephant back safaris
Fishing	Flight of the Angels
Kayaking	Bunji jumping
Hiking	Sundowner Cruises
Canoeing	Golf
Micro Lighting	Horse riding
Safaris	Helicopter flips
	Other, please describe

Show card 5: Question 13: Tourist Survey

How far in advance did you plan this trip to the Victoria Falls?

1 to 2 weeks
3 to 4 weeks
More than 1 month
More than 2 months
Longer, specify

Show card 6: Questions 15 – 17: Tourist Survey

Rating of experience at Hotel / Lodge, Local Restaurants, Local Attractions/ Activities

Excellent
Very good
Good
Fair
Poor

Show card 7: Questions 19: Tourist Survey

Suggestions for improving the Victoria Falls as a key tourist destination.

Improve road signs	Provide maps to the area
Keep stores open later	Provide more police patrols
Provide better access to view points	Clean up town
Improve how businesses treat customers	Other, please describe

Show card 8: Questions 20: Tourist Survey

Members of the party you are traveling in.

Spouse or significant other	**Friends**
Own children	**Tour group members**
Other relatives	**Business associates**
	Other, please describe

Show card 9: Questions 21: Tourist Survey

Ages of people in your party

12 years or younger
13 to 19 years of age
20 to 35 years of age
36 to 59 years of age
60 years of age or older

Show card 10: Questions 22: Tourist Survey

What is your profession?

Professional / Technical	Administrative / Executive
Middle Management	Student
Retired	Other, please specify

Appendix IV: Tourism Industry (Trade) Questionnaire

GRADUATE SCHOOL OF BUSINESS

UNIVERSITY OF KWAZULU-NATAL

Tourism Trade Questionnaire

SURVEY TO IDENTIFY FACTORS WHICH MAY ASSIST THE ZIMBABWE TOURISM AUTHORITY'S (ZTA) EFFORTS TO REPOSITION ZIMBABWE AS A KEY TOURIST DESTINATION, WITH EMPHASIS ON THE VICTORIA FALLS.

May 2004

My name is Yvonne Mutyambizi, an MBA Third Year Student at the Graduate School of Business, University of Kwazulu-Natal. I am currently conducting a dissertation whose aim is to find out what can be done to reverse the decline in tourist arrivals at the Victoria Falls.

I would be most grateful if you could spare some time to answer this questionnaire. There are no wrong or right answers it is only your factual response that matters. All the information and views you give will be treated in strict confidence. Participation in this study is voluntary. The results of the survey will remain strictly confidential.

Thank you in advance for your time and co-operation.

Questionnaire number...Date......................

Name of enumerator...................................Signature..........................

The following information will be used only for follow-up purposes and clarification

Name of respondent:
Organisation / Nature of Business:
Designation /Title:
Gender:
Telephone:
Fax:
Email:

Please read the background to the survey before giving your valuable input.

Background:

The Zimbabwe Tourism Authority has embarked on a major repositioning exercise focusing primarily on the Victoria Falls, and would like your input as to how to effectively reposition this scenic tourist attraction.

As you are aware, the Zimbabwe Tourism Authority (ZTA) is a parastatal falling under the Ministry of Mines, Environment and Tourism. The organization comprises four divisions, namely Marketing and Communications, Human resources and Standards, Research and Development as well as Finance and Administration.

ZTA's *vision* is "to be the best national Tourist Organisation in the world and position Zimbabwe as a world class tourist destination." Flowing from this is the *mission statement* which is "to professionally market Zimbabwe as a leading tourist destination, set, and monitor standards, provide market research and statistics, and assist in creating and enabling environment, for the benefit of the nation and its visitors."

In view of the prevailing harsh and uncontrollable environment and other constraints, the organisation may sometimes have fallen short of its mission. To this end, we would like your input as to what the tourism industry in general, and the private sector in particular can do to reverse the decline in international tourist arrivals from traditional source markets, with emphasis on the Victoria Falls.

This questionnaire is based purely on the functions of the authority.

For each function, firstly please rate ZTA's performance.

Secondly, briefly describe *one* suggestion as to how the ZTA should execute its functions.

Question 1. Please rate the authority's performance: (Please tick the appropriate rating)

Item	Function	**Strongly Agree (5)**	**Agree (4)**	**Neither Agree nor Disagree (3)**	**Disagree (2)**	**Strongly Disagree (1)**
a)	ZTA has been successful in its efforts to *"promote Zimbabwe as a tourist destination and promoting the tourist industry in overseas, regional and domestic markets."*					
b)	ZTA has "*developed marketing skills and initiatives within the tourism industry."*					
c)	ZTA has "*promoted high standards in the tourism industry through the establishment of standards, training and human resource development."*					
d)	The Authority has successfully *"registered and graded designated tourism facilities."*					
e)	The Authority adequately *"promotes develops tourist facilities."*					
f)	ZTA satisfactorily "plans for the tourism industry, including conducting market research and developing a tourism database."					
g)	ZTA adequately "*Promotes awareness in Zimbabwe of the benefits of tourism."*					
h)	The Authority *"Promotes consultancy and advisory services in relation to tourism."*					
i)	ZTA continuously strives to *"investigates and makes recommendations to the Ministry of Mines, Environments and Tourism on any matter affecting the tourist industry and the administration of the Tourism Act."*					

Question 2. Please **give one suggestion as to how the ZTA should be** executing its functions: where possible please give reference to the Victoria Falls

Item	Function	Suggestion
a.	How should the ZTA *"promote Zimbabwe as a tourist destination and promote the tourist industry in overseas, regional and domestic markets?"*	
b.	How should the ZTA be "d*eveloping marketing skills and initiatives within the tourism industry?"*	
c.	How should the ZTA *"promote high standards in the tourism industry through the establishment of standards, training and human resource development."*	
d.	How should the Authority ***"register and grade designat**ed tourism facilities."*	

Item	Function	Suggestion
e.	How should the Authority *"**promote the development** of tourist facilities?"*	
f.	How should ZTA *"plan for the tourism industry, including conducting market research and developing a tourism database."*	
g.	How should ZTA "*Promote awareness in Zimbabwe of the benefits of tourism.*"	
h.	How should the Authority *"Promote consultancy and advisory services in relation to tourism."*	
i.	What should the Authority *"investigate and make recommendations to the Ministry of Mines, Environments and Tourism, regarding the tourism industry and the administration of the Tourism Act?"*	

<u>Thank-you once again for part</u>

Appendix V: Tourist Questionnaire Statistical Tables (1 – 55)

[able 1: Question 1: How did you first come to know about the Victoria Falls?

			COUNTRY OF ORIGIN							GENDER	
		100%	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
100%		40	7	9	4	4	6	5	5	30	10
riends ǎmily	Count	20	2	7	2	0	6	2	1	15	5
	Col %	50%	29%	78%	50%	0%	100%	40%	20%	50%	50%
	Row %	100%	10%	35%	10%	0%	30%	10%	5%	75%	25%
ravel agent	Count	14	4	3	2	0	1	1	3	11	3
	Col %	35%	57%	33%	50%	0%	17%	20%	60%	37%	30%
	Row %	100%	29%	21%	14%	0%	7%	7%	21%	79%	21%
Magazine/ne wspaper ad	Count	9	1	1	0	3	0	2	2	6	3
	Col %	23%	14%	11%	0%	75%	0%	40%	40%	20%	30%
	Row %	100%	11%	11%	0%	33%	0%	22%	22%	67%	33%
nternet	Count	4	0	0	2	1	1	0	0	4	0
	Col %	10%	0%	0%	50%	25%	17%	0%	0%	13%	0%
	Row %	100%	0%	0%	50%	25%	25%	0%	0%	100%	0%
Maps	Count	2	0	0	0	0	1	0	1	2	0
	Col %	5%	0%	0%	0%	0%	17%	0%	20%	7%	0%
	Row %	100%	0%	0%	0%	0%	50%	0%	50%	100%	0%
Word of nouth	Count	1	0	0	0	0	0	1	0	0	1
	Col %	3%	0%	0%	0%	0%	0%	20%	0%	0%	10%
	Row %	100%	0%	0%	0%	0%	0%	100%	0%	0%	100%

ible 2: Question 2: Which of the following information sources did you actually use during your visit to Vic Falls?

			COUNTRY OF ORIGIN							GENDER	
		100%	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
100%		40	7	9	4	4	6	5	5	30	10
ur guides	Count	24	5	5	1	3	2	4	4	16	8
	Col %	60%	71%	56%	25%	75%	33%	80%	80%	53%	80%
	Row %	100%	21%	21%	4%	13%	8%	17%	17%	67%	33%
agazine/ne paper ad	Count	13	1	1	1	1	5	1	3	10	3
	Col %	33%	14%	11%	25%	25%	83%	20%	60%	33%	30%
	Row %	100%	8%	8%	8%	8%	38%	8%	23%	77%	23%
ochures/ne letter	Count	9	0	4	3	0	0	2	0	8	1
	Col %	23%	0%	44%	75%	0%	0%	40%	0%	27%	10%
	Row %	100%	0%	44%	33%	0%	0%	22%	0%	89%	11%
ernet	Count	3	1	0	1	0	0	0	1	2	1
	Col %	8%	14%	0%	25%	0%	0%	0%	20%	7%	10%
	Row %	100%	33%	0%	33%	0%	0%	0%	33%	67%	33%
ord of outh	Count	3	0	0	0	0	3	0	0	3	0
	Col %	8%	0%	0%	0%	0%	50%	0%	0%	10%	0%
	Row %	100%	0%	0%	0%	0%	100%	0%	0%	100%	0%
her	Count	2	0	1	1	0	0	0	0	2	0
	Col %	5%	0%	11%	25%	0%	0%	0%	0%	7%	0%
	Row %	100%	0%	50%	50%	0%	0%	0%	0%	100%	0%

3: Question 3a: Importance of "getting away from the demands of home" in influencing your choice of destination.

			COUNTRY OF ORIGIN							GENDER	
		100%	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
100%	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	Row%	100%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
	Count	25	5	6	3	2	3	4	2	19	6
ant	Col %	62.5%	71.4%	66.7%	75.0%	50.0%	50.0%	80.0%	40.0%	63.3%	60.0%
	Row%	100%	20.0%	24.0%	12.0%	8.0%	12.0%	16.0%	8.0%	76.0%	24.0%
all	Count	7	1	2	1	2	0	0	1	4	3
ant	Col %	17.5%	14.3%	22.2%	25.0%	50.0%	0.0%	0.0%	20.0%	13.3%	30.0%
	Row%	100%	14.3%	28.6%	14.3%	28.6%	0.0%	0.0%	14.3%	57.1%	42.9%
y	Count	6	0	1	0	0	3	1	1	6	0
ant	Col %	15.0%	0.0%	11.1%	0.0%	0.0%	50.0%	20.0%	20.0%	20.0%	0.0%
	Row%	100%	0.0%	16.7%	0.0%	0.0%	50.0%	16.7%	16.7%	100.0%	0.0%
ry	Count	2	1	0	0	0	0	0	1	1	1
tant	Col %	5.0%	14.3%	0.0%	0.0%	0.0%	0.0%	0.0%	20.0%	3.3%	10.0%
	Row%	100%	50.0%	0.0%	0.0%	0.0%	0.0%	0.0%	50.0%	50.0%	50.0%
		3.23	3.29	3.22	3.25	2.5	3.5	3.8	2.8	3.33	2.9
eviation		1.17	1.25	1.3	1.5	1.73	0.55	0.45	1.3	1.06	1.45
ce		1.36	1.57	1.69	2.25	3	0.3	0.2	1.7	1.13	2.1

ble 4: Question 3b: Importance of "experiencing new and different lifestyles" in influencing your choice of destination.

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
ry	Count	28	6	7	2	4	2	4	3	20	8
portant	Col %	70.0%	85.7%	77.8%	50.0%	100.0%	33.3%	80.0%	60.0%	66.7%	80.0%
	Row%	100.0%	21.4%	25.0%	7.1%	14.3%	7.1%	14.3%	10.7%	71.4%	28.6%
ghtly	Count	10	0	2	2	0	4	1	1	9	1
portant	Col %	25.0%	0.0%	22.2%	50.0%	0.0%	66.7%	20.0%	20.0%	30.0%	10.0%
	Row%	100.0%	0.0%	20.0%	20.0%	0.0%	40.0%	10.0%	10.0%	90.0%	10.0%
t very	Count	2	1	0	0	0	0	0	1	1	1
portant	Col %	5.0%	14.3%	0.0%	0.0%	0.0%	0.0%	0.0%	20.0%	3.3%	10.0%
	Row%	100.0%	50.0%	0.0%	0.0%	0.0%	0.0%	0.0%	50.0%	50.0%	50.0%
an		3.65	3.71	3.78	3.5	4	3.33	3.8	3.4	3.63	3.7
l Deviation		0.58	0.76	0.44	0.58	0	0.52	0.45	0.89	0.56	0.67
riance		0.34	0.57	0.19	0.33	0	0.27	0.2	0.8	0.31	0.46

Table 5: Question 3c: Importance of "trying new foods" in influencing your choice of destination.

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
Very important	Count	15	3	0	2	1	4	2	3	10	5
	Col %	37.5%	42.9%	0.0%	50.0%	25.0%	66.7%	40.0%	60.0%	33.3%	50.0%
	Row%	100.0%	20.0%	0.0%	13.3%	6.7%	26.7%	13.3%	20.0%	66.7%	33.3%
Slightly important	Count	9	2	2	1	0	1	1	2	8	1
	Col %	22.5%	28.6%	22.2%	25.0%	0.0%	16.7%	20.0%	40.0%	26.7%	10.0%
	Row%	100.0%	22.2%	22.2%	11.1%	0.0%	11.1%	11.1%	22.2%	88.9%	11.1%
Not at all important	Count	8	1	2	1	3	0	1	0	6	2
	Col %	20.0%	14.3%	22.2%	25.0%	75.0%	0.0%	20.0%	0.0%	20.0%	20.0%
	Row%	100.0%	12.5%	25.0%	12.5%	37.5%	0.0%	12.5%	0.0%	75.0%	25.0%
Not very important	Count	8	1	5	0	0	1	1	0	6	2
	Col %	20.0%	14.3%	55.6%	0.0%	0.0%	16.7%	20.0%	0.0%	20.0%	20.0%
	Row%	100.0%	12.5%	62.5%	0.0%	0.0%	12.5%	12.5%	0.0%	75.0%	25.0%
Mean		2.78	3	2	3	1.75	3.5	2.8	3.6	2.73	2.9
Std Deviation		1.17	1.15	0.71	1.41	1.5	0.84	1.3	0.55	1.14	1.29
Variance		1.36	1.33	0.5	2	2.25	0.7	1.7	0.3	1.31	1.66

Table 6: Question 3d: Importance of "visiting places important in history" in influencing your choice of destination.

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
Very important	Count	35	6	9	3	3	5	5	4	27	8
	Col %	87.5%	85.7%	100.0%	75.0%	75.0%	83.3%	100.0%	80.0%	90.0%	80.0%
	Row%	100.0%	17.1%	25.7%	8.6%	8.6%	14.3%	14.3%	11.4%	77.1%	22.9%
Slightly important	Count	5	1	0	1	1	1	0	1	3	2
	Col %	12.5%	14.3%	0.0%	25.0%	25.0%	16.7%	0.0%	20.0%	10.0%	20.0%
	Row%	100.0%	20.0%	0.0%	20.0%	20.0%	20.0%	0.0%	20.0%	60.0%	40.0%
Mean		3.88	3.86	4	3.75	3.75	3.83	4	3.8	3.9	3.8
Std Deviation		0.33	0.38	0	0.5	0.5	0.41	0	0.45	0.31	0.42
Variance		0.11	0.14	0	0.25	0.25	0.17	0	0.2	0.09	0.18

Table 7: Question 3e: Importance of "finding thrills and excitement" in influencing your choice of destination.

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
Very important	Count	29	6	7	3	1	4	4	4	22	7
	Col %	72.5%	85.7%	77.8%	75.0%	25.0%	66.7%	80.0%	80.0%	73.3%	70.0%
	Row%	100.0%	20.7%	24.1%	10.3%	3.4%	13.8%	13.8%	13.8%	75.9%	24.1%
Slightly important	Count	6	0	1	1	1	2	1	0	4	2
	Col %	15.0%	0.0%	11.1%	25.0%	25.0%	33.3%	20.0%	0.0%	13.3%	20.0%
	Row%	100.0%	0.0%	16.7%	16.7%	16.7%	33.3%	16.7%	0.0%	66.7%	33.3%
Not very important	Count	5	1	1	0	2	0	0	1	4	1
	Col %	12.5%	14.3%	11.1%	0.0%	50.0%	0.0%	0.0%	20.0%	13.3%	10.0%
	Row%	100.0%	20.0%	20.0%	0.0%	40.0%	0.0%	0.0%	20.0%	80.0%	20.0%
Mean		3.6	3.71	3.67	3.75	2.75	3.67	3.8	3.6	3.6	3.6
Std Deviation		0.71	0.76	0.71	0.5	0.96	0.52	0.45	0.89	0.72	0.7
Variance		0.5	0.57	0.5	0.25	0.92	0.27	0.2	0.8	0.52	0.49

Table 8 Question 3f: Importance of "going to places my friends havent been" in influencing your choice of destination.

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row %	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
Very important	Count	24	5	5	2	2	4	3	3	18	6
	Col %	60.0%	71.4%	55.6%	50.0%	50.0%	66.7%	60.0%	60.0%	60.0%	60.0%
	Row %	100.0%	20.8%	20.8%	8.3%	8.3%	16.7%	12.5%	12.5%	75.0%	25.0%
Slightly important	Count	7	1	2	1	1	1	1	0	4	3
	Col %	17.5%	14.3%	22.2%	25.0%	25.0%	16.7%	20.0%	0.0%	13.3%	30.0%
	Row %	100.0%	14.3%	28.6%	14.3%	14.3%	14.3%	14.3%	0.0%	57.1%	42.9%
Not very important	Count	6	1	2	0	0	1	1	1	5	1
	Col %	15.0%	14.3%	22.2%	0.0%	0.0%	16.7%	20.0%	20.0%	16.7%	10.0%
	Row %	100.0%	16.7%	33.3%	0.0%	0.0%	16.7%	16.7%	16.7%	83.3%	16.7%
Not at all important	Count	3	0	0	1	1	0	0	1	3	0
	Col %	7.5%	0.0%	0.0%	25.0%	25.0%	0.0%	0.0%	20.0%	10.0%	0.0%
	Row %	100.0%	0.0%	0.0%	33.3%	33.3%	0.0%	0.0%	33.3%	100.0%	0.0%
Mean		3.3	3.57	3.33	3	3	3.5	3.4	3	3.23	3.5
Std Deviation		0.99	0.79	0.87	1.41	1.41	0.84	0.89	1.41	1.07	0.71
Variance		0.98	0.62	0.75	2	2	0.7	0.8	2	1.15	0.5

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ıble 9 Question 3g: Importance of "talking about the trip after I return home" in influencing your choice of destination.

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
ry	Count	15	3	3	3	2	2	2	0	13	2
ɔortant	Col %	37.5%	42.9%	33.3%	75.0%	50.0%	33.3%	40.0%	0.0%	43.3%	20.0%
	Row%	100.0%	20.0%	20.0%	20.0%	13.3%	13.3%	13.3%	0.0%	86.7%	13.3%
t very	Count	13	3	3	1	0	2	1	3	8	5
portant	Col %	32.5%	42.9%	33.3%	25.0%	0.0%	33.3%	20.0%	60.0%	26.7%	50.0%
	Row%	100.0%	23.1%	23.1%	7.7%	0.0%	15.4%	7.7%	23.1%	61.5%	38.5%
ghtly	Count	9	1	3	0	1	2	1	1	6	3
portant	Col %	22.5%	14.3%	33.3%	0.0%	25.0%	33.3%	20.0%	20.0%	20.0%	30.0%
	Row%	100.0%	11.1%	33.3%	0.0%	11.1%	22.2%	11.1%	11.1%	66.7%	33.3%
t at all	Count	3	0	0	0	1	0	1	1	3	0
portant	Col %	7.5%	0.0%	0.0%	0.0%	25.0%	0.0%	20.0%	20.0%	10.0%	0.0%
	Row%	100.0%	0.0%	0.0%	0.0%	33.3%	0.0%	33.3%	33.3%	100.0%	0.0%
ɛan		2.9	3	3	3.5	3	3	2.8	2	2.97	2.7
l Deviation		1.01	1	0.87	1	1.41	0.89	1.3	0.71	1.07	0.82
riance		1.02	1	0.75	1	2	0.8	1.7	0.5	1.14	0.68

able 10 Question 3h: Importance of "participating in sports" in influencing your choice of destination.

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
ry	Count	22	5	3	3	3	3	3	2	18	4
portant	Col %	55.0%	71.4%	33.3%	75.0%	75.0%	50.0%	60.0%	40.0%	60.0%	40.0%
	Row%	100.0%	22.7%	13.6%	13.6%	13.6%	13.6%	13.6%	9.1%	81.8%	18.2%
ghtly	Count	10	0	4	1	1	2	1	1	6	4
portant	Col %	25.0%	0.0%	44.4%	25.0%	25.0%	33.3%	20.0%	20.0%	20.0%	40.0%
	Row%	100.0%	0.0%	40.0%	10.0%	10.0%	20.0%	10.0%	10.0%	60.0%	40.0%
t very	Count	7	2	2	0	0	1	1	1	5	2
portant	Col %	17.5%	28.6%	22.2%	0.0%	0.0%	16.7%	20.0%	20.0%	16.7%	20.0%
	Row%	100.0%	28.6%	28.6%	0.0%	0.0%	14.3%	14.3%	14.3%	71.4%	28.6%
t at all	Count	1	0	0	0	0	0	0	1	1	0
portant	Col %	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	20.0%	3.3%	0.0%
	Row%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	100.0%	0.0%
ɛan		3.25	3.43	3.11	3.75	3.75	3.33	3.4	2.2	3.37	2.9
l Deviation		1.01	0.98	0.78	0.5	0.5	0.82	0.89	1.79	0.89	1.29
riance		1.01	0.95	0.61	0.25	0.25	0.67	0.8	3.2	0.79	1.66

Table 11: Question 3i: Importance of "learning new outdoor skills" in influencing your choice of destination.

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
Very important	Count	29	5	7	3	4	4	3	3	24	5
	Col %	72.5%	71.4%	77.8%	75.0%	100.0%	66.7%	60.0%	60.0%	80.0%	50.0%
	Row%	100.0%	17.2%	24.1%	10.3%	13.8%	13.8%	10.3%	10.3%	82.8%	17.2%
Slightly important	Count	8	0	2	1	0	1	2	2	3	5
	Col %	20.0%	0.0%	22.2%	25.0%	0.0%	16.7%	40.0%	40.0%	10.0%	50.0%
	Row%	100.0%	0.0%	25.0%	12.5%	0.0%	12.5%	25.0%	25.0%	37.5%	62.5%
Not very important	Count	3	2	0	0	0	1	0	0	3	0
	Col %	7.5%	28.6%	0.0%	0.0%	0.0%	16.7%	0.0%	0.0%	10.0%	0.0%
	Row%	100.0%	66.7%	0.0%	0.0%	0.0%	33.3%	0.0%	0.0%	100.0%	0.0%
Mean		3.65	3.43	3.78	3.75	4	3.5	3.6	3.6	3.7	3.5
Std Deviation		0.62	0.98	0.44	0.5	0	0.84	0.55	0.55	0.65	0.53
Variance		0.39	0.95	0.19	0.25	0	0.7	0.3	0.3	0.42	0.28

Table 12: Question 3j: Importance of "travelling to places where I feel safe and secure" in influencing your choice of destination.

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
Very important	Count	24	6	6	1	3	3	3	2	21	3
	Col %	60.0%	85.7%	66.7%	25.0%	75.0%	50.0%	60.0%	40.0%	70.0%	30.0%
	Row%	100.0%	25.0%	25.0%	4.2%	12.5%	12.5%	12.5%	8.3%	87.5%	12.5%
Not very important	Count	9	1	2	2	0	2	0	2	5	4
	Col %	22.5%	14.3%	22.2%	50.0%	0.0%	33.3%	0.0%	40.0%	16.7%	40.0%
	Row%	100.0%	11.1%	22.2%	22.2%	0.0%	22.2%	0.0%	22.2%	55.6%	44.4%
Slightly important	Count	7	0	1	1	1	1	2	1	4	3
	Col %	17.5%	0.0%	11.1%	25.0%	25.0%	16.7%	40.0%	20.0%	13.3%	30.0%
	Row%	100.0%	0.0%	14.3%	14.3%	14.3%	14.3%	28.6%	14.3%	57.1%	42.9%
Mean		3.38	3.71	3.44	2.75	3.75	3.17	3.6	3	3.53	2.9
Std Deviation		0.84	0.76	0.88	0.96	0.5	0.98	0.55	1	0.78	0.88
Variance		0.7	0.57	0.78	0.92	0.25	0.97	0.3	1	0.6	0.77

Table 14: Question 3k: Importance of "seeing as much as possible in the time available" in influencing your choice of destination.

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
Very important	Count	18	3	6	1	2	1	3	2	13	5
	Col %	45.0%	42.9%	66.7%	25.0%	50.0%	16.7%	60.0%	40.0%	43.3%	50.0%
	Row%	100.0%	16.7%	33.3%	5.6%	11.1%	5.6%	16.7%	11.1%	72.2%	27.8%
Not very important	Count	10	2	2	3	0	2	0	1	7	3
	Col %	25.0%	28.6%	22.2%	75.0%	0.0%	33.3%	0.0%	20.0%	23.3%	30.0%
	Row%	100.0%	20.0%	20.0%	30.0%	0.0%	20.0%	0.0%	10.0%	70.0%	30.0%
Slightly important	Count	8	1	1	0	1	2	1	2	7	1
	Col %	20.0%	14.3%	11.1%	0.0%	25.0%	33.3%	20.0%	40.0%	23.3%	10.0%
	Row%	100.0%	12.5%	12.5%	0.0%	12.5%	25.0%	12.5%	25.0%	87.5%	12.5%
Not at all important	Count	4	1	0	0	1	1	1	0	3	1
	Col %	10.0%	14.3%	0.0%	0.0%	25.0%	16.7%	20.0%	0.0%	10.0%	10.0%
	Row%	100.0%	25.0%	0.0%	0.0%	25.0%	25.0%	25.0%	0.0%	75.0%	25.0%
Mean		3	2.86	3.44	2.5	3	2.5	3.2	3.2	3	3
Std Deviation		1.06	1.21	0.88	1	1.41	1.05	1.3	0.84	1.05	1.15
Variance		1.13	1.48	0.78	1	2	1.1	1.7	0.7	1.1	1.33

Table 15: Question 3m: Importance of "rediscovering myself" in influencing your choice of destination.

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
Slightly important	Count	15	1	4	2	1	2	2	3	9	6
	Col %	37.5%	14.3%	44.4%	50.0%	25.0%	33.3%	40.0%	60.0%	30.0%	60.0%
	Row%	100.0%	6.7%	26.7%	13.3%	6.7%	13.3%	13.3%	20.0%	60.0%	40.0%
Very important	Count	14	4	2	1	1	2	2	2	11	3
	Col %	35.0%	57.1%	22.2%	25.0%	25.0%	33.3%	40.0%	40.0%	36.7%	30.0%
	Row%	100.0%	28.6%	14.3%	7.1%	7.1%	14.3%	14.3%	14.3%	78.6%	21.4%
Not very important	Count	8	2	1	1	1	2	1	0	7	1
	Col %	20.0%	28.6%	11.1%	25.0%	25.0%	33.3%	20.0%	0.0%	23.3%	10.0%
	Row%	100.0%	25.0%	12.5%	12.5%	12.5%	25.0%	12.5%	0.0%	87.5%	12.5%
Not at all important	Count	3	0	2	0	1	0	0	0	3	0
	Col %	7.5%	0.0%	22.2%	0.0%	25.0%	0.0%	0.0%	0.0%	10.0%	0.0%
	Row%	100.0%	0.0%	66.7%	0.0%	33.3%	0.0%	0.0%	0.0%	100.0%	0.0%
Mean		3	3.29	2.67	3	2.5	3	3.2	3.4	2.93	3.2
Std Deviation		0.93	0.95	1.12	0.82	1.29	0.89	0.84	0.55	1.01	0.63
Variance		0.87	0.9	1.25	0.67	1.67	0.8	0.7	0.3	1.03	0.4

Table 16: Question 3n: Importance of "visiting family and friends" influences your choice of destination.

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
Very important	Count	15	3	5	0	1	3	1	2	13	2
	Col %	37.5%	42.9%	55.6%	0.0%	25.0%	50.0%	20.0%	40.0%	43.3%	20.0%
	Row%	100.0%	20.0%	33.3%	0.0%	6.7%	20.0%	6.7%	13.3%	86.7%	13.3%
Slightly important	Count	10	1	1	3	0	1	2	2	7	3
	Col %	25.0%	14.3%	11.1%	75.0%	0.0%	16.7%	40.0%	40.0%	23.3%	30.0%
	Row%	100.0%	10.0%	10.0%	30.0%	0.0%	10.0%	20.0%	20.0%	70.0%	30.0%
Not at all important	Count	8	2	3	1	1	0	1	0	5	3
	Col %	20.0%	28.6%	33.3%	25.0%	25.0%	0.0%	20.0%	0.0%	16.7%	30.0%
	Row%	100.0%	25.0%	37.5%	12.5%	12.5%	0.0%	12.5%	0.0%	62.5%	37.5%
Not very important	Count	7	1	0	0	2	2	1	1	5	2
	Col %	17.5%	14.3%	0.0%	0.0%	50.0%	33.3%	20.0%	20.0%	16.7%	20.0%
	Row%	100.0%	14.3%	0.0%	0.0%	28.6%	28.6%	14.3%	14.3%	71.4%	28.6%
Mean		2.73	2.71	2.89	2.5	2.25	3.17	2.6	2.6	2.93	2.1
Std Deviation		1.24	1.38	1.45	1	1.26	0.98	1.14	1.67	1.14	1.37
Variance		1.54	1.9	2.11	1	1.58	0.97	1.3	2.8	1.31	1.88

Table 17: Question 3o: Importance of "visiting places my family originated from" influences your choice of destination.

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
Very important	Count	16	3	6	0	2	2	1	2	13	3
	Col %	40.0%	42.9%	66.7%	0.0%	50.0%	33.3%	20.0%	40.0%	43.3%	30.0%
	Row%	100.0%	18.8%	37.5%	0.0%	12.5%	12.5%	6.3%	12.5%	81.3%	18.8%
Slightly important	Count	11	0	1	2	0	2	4	2	8	3
	Col %	27.5%	0.0%	11.1%	50.0%	0.0%	33.3%	80.0%	40.0%	26.7%	30.0%
	Row%	100.0%	0.0%	9.1%	18.2%	0.0%	18.2%	36.4%	18.2%	72.7%	27.3%
Not very important	Count	7	2	2	1	0	1	0	1	4	3
	Col %	17.5%	28.6%	22.2%	25.0%	0.0%	16.7%	0.0%	20.0%	13.3%	30.0%
	Row%	100.0%	28.6%	28.6%	14.3%	0.0%	14.3%	0.0%	14.3%	57.1%	42.9%
Not at all important	Count	6	2	0	1	2	1	0	0	5	1
	Col %	15.0%	28.6%	0.0%	25.0%	50.0%	16.7%	0.0%	0.0%	16.7%	10.0%
	Row%	100.0%	33.3%	0.0%	16.7%	33.3%	16.7%	0.0%	0.0%	83.3%	16.7%
Mean		2.85	2.57	3.44	2.25	2.5	2.83	3.2	2.6	2.97	2.5
Std Deviation		1.19	1.4	0.88	0.96	1.73	1.17	0.45	1.67	1.13	1.35
Variance		1.41	1.95	0.78	0.92	3	1.37	0.2	2.8	1.27	1.83

Table 18: Question 3p: Importance of "being physically active" influences your choice of destination.

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
Very important	Count	28	5	7	4	1	4	4	3	20	8
	Col %	70.0%	71.4%	77.8%	100.0%	25.0%	66.7%	80.0%	60.0%	66.7%	80.0%
	Row%	100.0%	17.9%	25.0%	14.3%	3.6%	14.3%	14.3%	10.7%	71.4%	28.6%
Slightly important	Count	7	1	1	0	1	2	1	1	5	2
	Col %	17.5%	14.3%	11.1%	0.0%	25.0%	33.3%	20.0%	20.0%	16.7%	20.0%
	Row%	100.0%	14.3%	14.3%	0.0%	14.3%	28.6%	14.3%	14.3%	71.4%	28.6%
Not very important	Count	4	0	1	0	2	0	0	1	4	0
	Col %	10.0%	0.0%	11.1%	0.0%	50.0%	0.0%	0.0%	20.0%	13.3%	0.0%
	Row%	100.0%	0.0%	25.0%	0.0%	50.0%	0.0%	0.0%	25.0%	100.0%	0.0%
Not at all important	Count	1	1	0	0	0	0	0	0	1	0
	Col %	2.5%	14.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%	0.0%
	Row%	100.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%
Mean		3.55	3.43	3.67	4	2.75	3.67	3.8	3.4	3.47	3.8
Std Deviation		0.78	1.13	0.71	0	0.96	0.52	0.45	0.89	0.86	0.42
Variance		0.61	1.29	0.5	0	0.92	0.27	0.2	0.8	0.74	0.18

Table 19: Question 3q: Importance of "getting a change from a busy schedule" influences your choice of destination.

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.00%
Very important	Count	23	3	6	3	1	4	3	3	16	7
	Col %	57.5%	42.9%	66.7%	75.0%	25.0%	66.7%	60.0%	60.0%	53.3%	70.0%
	Row%	100.0%	13.0%	26.1%	13.0%	4.3%	17.4%	13.0%	13.0%	69.6%	30.4%
Slightly important	Count	9	1	2	1	2	1	1	1	7	2
	Col %	22.5%	14.3%	22.2%	25.0%	50.0%	16.7%	20.0%	20.0%	23.3%	20.0%
	Row%	100.0%	11.1%	22.2%	11.1%	22.2%	11.1%	11.1%	11.1%	77.8%	22.2%
Not very important	Count	6	1	1	0	1	1	1	1	6	0
	Col %	15.0%	14.3%	11.1%	0.0%	25.0%	16.7%	20.0%	20.0%	20.0%	0.0%
	Row%	100.0%	16.7%	16.7%	0.0%	16.7%	16.7%	16.7%	16.7%	100.0%	0.0%
Not at all important	Count	2	2	0	0	0	0	0	0	1	1
	Col %	5.0%	28.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%	10.0%
	Row%	100.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	50.0%	50.0%
Mean		3.33	2.71	3.56	3.75	3	3.5	3.4	3.4	3.27	3.5
Std Deviation		0.92	1.38	0.73	0.5	0.82	0.84	0.89	0.89	0.91	0.97
Variance		0.84	1.9	0.53	0.25	0.67	0.7	0.8	0.8	0.82	0.94

Table 20: Question 3r: Importance of "being daring and adventuresome" influences your choice of destination.											
			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
Very important	Count	22	4	4	2	1	5	3	3	18	4
	Col %	55.0%	57.1%	44.4%	50.0%	25.0%	83.3%	60.0%	60.0%	60.0%	40.0%
	Row%	100.0%	18.2%	18.2%	9.1%	4.5%	22.7%	13.6%	13.6%	81.8%	18.2%
Slightly important	Count	10	1	2	0	3	0	2	2	6	4
	Col %	25.0%	14.3%	22.2%	0.0%	75.0%	0.0%	40.0%	40.0%	20.0%	40.0%
	Row%	100.0%	10.0%	20.0%	0.0%	30.0%	0.0%	20.0%	20.0%	60.0%	40.0%
Not very important	Count	7	2	3	1	0	1	0	0	5	2
	Col %	17.5%	28.6%	33.3%	25.0%	0.0%	16.7%	0.0%	0.0%	16.7%	20.0%
	Row%	100.0%	28.6%	42.9%	14.3%	0.0%	14.3%	0.0%	0.0%	71.4%	28.6%
Not at all important	Count	1	0	0	1	0	0	0	0	1	0
	Col %	2.5%	0.0%	0.0%	25.0%	0.0%	0.0%	0.0%	0.0%	3.3%	0.0%
	Row%	100.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%
Mean		3.33	3.29	3.11	2.75	3.25	3.67	3.6	3.6	3.37	3.2
Std Deviation		0.86	0.95	0.93	1.5	0.5	0.82	0.55	0.55	0.89	0.79
Variance		0.74	0.9	0.86	2.25	0.25	0.67	0.3	0.3	0.79	0.62

Table 21: Question 3s: Importance of "doing nothing at all" influences your choice of destination.											
			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
Very important	Count	15	2	4	2	2	2	1	2	10	5
	Col %	37.5%	28.6%	44.4%	50.0%	50.0%	33.3%	20.0%	40.0%	33.3%	50.0%
	Row%	100.0%	13.3%	26.7%	13.3%	13.3%	13.3%	6.7%	13.3%	66.7%	33.3%
Slightly important	Count	11	0	2	1	2	1	2	3	9	2
	Col %	27.5%	0.0%	22.2%	25.0%	50.0%	16.7%	40.0%	60.0%	30.0%	20.0%
	Row%	100.0%	0.0%	18.2%	9.1%	18.2%	9.1%	18.2%	27.3%	81.8%	18.2%
Not at all important	Count	7	3	0	1	0	1	2	0	6	1
	Col %	17.5%	42.9%	0.0%	25.0%	0.0%	16.7%	40.0%	0.0%	20.0%	10.0%
	Row%	100.0%	42.9%	0.0%	14.3%	0.0%	14.3%	28.6%	0.0%	85.7%	14.3%
Not very important	Count	7	2	3	0	0	2	0	0	5	2
	Col %	17.5%	28.6%	33.3%	0.0%	0.0%	33.3%	0.0%	0.0%	16.7%	20.0%
	Row%	100.0%	28.6%	42.9%	0.0%	0.0%	28.6%	0.0%	0.0%	71.4%	28.6%
Mean		2.78	2.14	3.11	3	3.5	2.67	2.4	2.8	2.77	2.8
Std Deviation		1.21	1.35	0.93	1.41	0.58	1.21	1.34	1.64	1.14	1.48
Variance		1.46	1.81	0.86	2	0.33	1.47	1.8	2.7	1.29	2.18

Table 22: Question 3t: Importance of "taking advantage of reduced rates" influences your choice of destination.

		1	COUNTRY OF ORIGIN							GENDER	
			China	USA	Hungary	India	England	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
Not at all important	Count	15	2	5	1	2	3	2	0	12	3
	Col %	38.5%	33.3%	55.6%	25.0%	50.0%	50.0%	40.0%	0.0%	41.4%	30.0%
	Row%	100.0%	13.3%	33.3%	6.7%	13.3%	20.0%	13.3%	0.0%	80.0%	20.0%
Very important	Count	10	2	2	2	1	1	0	2	6	4
	Col %	25.6%	33.3%	22.2%	50.0%	25.0%	16.7%	0.0%	40.0%	20.7%	40.0%
	Row%	100.0%	20.0%	20.0%	20.0%	10.0%	10.0%	0.0%	20.0%	60.0%	40.0%
Not very important	Count	7	2	1	0	1	2	0	1	7	0
	Col %	17.9%	33.3%	11.1%	0.0%	25.0%	33.3%	0.0%	20.0%	24.1%	0.0%
	Row%	100.0%	28.6%	14.3%	0.0%	14.3%	28.6%	0.0%	14.3%	100.0%	0.0%
Slightly important	Count	7	0	1	1	0	0	3	2	4	3
	Col %	17.9%	0.0%	11.1%	25.0%	0.0%	0.0%	60.0%	40.0%	13.8%	30.0%
	Row%	100.0%	0.0%	14.3%	14.3%	0.0%	0.0%	42.9%	28.6%	57.1%	42.9%
Mean		2.23	2.33	2	3	2	1.83	2.2	2.6	2.14	2.5
Std Deviation		1.29	1.37	1.32	1.41	1.41	1.17	1.1	1.67	1.19	1.58
Variance		1.66	1.87	1.75	2	2	1.37	1.2	2.8	1.41	2.5

Table 23: Question 4a: Have you had the opportunity of viewing Vic Falls from the Zambian side?

		1	COUNTRY OF ORIGIN							GENDER	
			China	USA	Hungary	India	England	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
Yes	Count	21	4	5	0	2	2	3	5	14	7
	Col%	52.5%	57.1%	55.6%	0.0%	50.0%	33.3%	60.0%	100.0%	46.7%	70.0%
	Row%	100.0%	19.0%	23.8%	0.0%	9.5%	9.5%	14.3%	23.8%	66.7%	33.3%
No	Count	19	3	4	4	2	4	2	0	16	3
	Col%	47.5%	42.9%	44.4%	100.0%	50.0%	66.7%	40.0%	0.0%	53.3%	30.0%
	Row%	100.0%	15.8%	21.1%	21.1%	10.5%	21.1%	10.5%	0.0%	84.2%	15.8%

Table 24: Question 4b: From which side do you prefer to view the Victoria Falls?											
			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	England	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row %	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
Undecided	Count	20	5	5	1	2	2	1	4	14	6
	Col %	50.0%	71.4%	55.6%	25.0%	50.0%	33.3%	20.0%	80.0%	46.7%	60.0%
	Row %	100.0%	25.0%	25.0%	5.0%	10.0%	10.0%	5.0%	20.0%	70.0%	30.0%
Zambian side	Count	8	1	1	0	1	2	2	1	7	1
	Col %	20.0%	14.3%	11.1%	0.0%	25.0%	33.3%	40.0%	20.0%	23.3%	10.0%
	Row %	100.0%	12.5%	12.5%	0.0%	12.5%	25.0%	25.0%	12.5%	87.5%	12.5%
Zimbabwean side	Count	6	0	1	3	1	0	1	0	5	1
	Col %	15.0%	0.0%	11.1%	75.0%	25.0%	0.0%	20.0%	0.0%	16.7%	10.0%
	Row %	100.0%	0.0%	16.7%	50.0%	16.7%	0.0%	16.7%	0.0%	83.3%	16.7%
Both sides equally good	Count	6	1	2	0	0	2	1	0	4	2
	Col %	15.0%	14.3%	22.2%	0.0%	0.0%	33.3%	20.0%	0.0%	13.3%	20.0%
	Row %	100.0%	16.7%	33.3%	0.0%	0.0%	33.3%	16.7%	0.0%	66.7%	33.3%

Table 25: Question 5a: Which country do you associate most with fast service?											
			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	England	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row %	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
Zimbabwe	Count	30	6	7	2	2	4	5	4	21	9
	Col %	75.0%	85.7%	77.8%	50.0%	50.0%	66.7%	100.0%	80.0%	70.0%	90.0%
	Row %	100.0%	20.0%	23.3%	6.7%	6.7%	13.3%	16.7%	13.3%	70.0%	30.0%
South Africa	Count	9	0	2	2	2	2	0	1	8	1
	Col %	22.5%	0.0%	22.2%	50.0%	50.0%	33.3%	0.0%	20.0%	26.7%	10.0%
	Row %	100.0%	0.0%	22.2%	22.2%	22.2%	22.2%	0.0%	11.1%	88.9%	11.1%
Zambia	Count	1	1	0	0	0	0	0	0	1	0
	Col %	2.5%	14.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%	0.0%
	Row %	100.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%

Table 26: Question 5b: Which country do you associate most with friendly staff?

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
imbabwe	Count	33	7	9	4	3	3	4	3	25	8
	Col %	82.5%	100.0%	100.0%	100.0%	75.0%	50.0%	80.0%	60.0%	83.3%	80.0%
	Row%	100.0%	21.2%	27.3%	12.1%	9.1%	9.1%	12.1%	9.1%	75.8%	24.2%
outh Africa	Count	6	0	0	0	1	3	0	2	4	2
	Col %	15.0%	0.0%	0.0%	0.0%	25.0%	50.0%	0.0%	40.0%	13.3%	20.0%
	Row%	100.0%	0.0%	0.0%	0.0%	16.7%	50.0%	0.0%	33.3%	66.7%	33.3%
ambia	Count	1	0	0	0	0	0	1	0	1	0
	Col %	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	20.0%	0.0%	3.3%	0.0%
	Row%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	100.0%	0.0%

Table 27: Question 5c: Which country do you associate most with good image and reputation?

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
Zimbabwe	Count	23	7	6	0	1	4	3	2	17	6
	Col %	57.5%	100.0%	66.7%	0.0%	25.0%	66.7%	60.0%	40.0%	56.7%	60.0%
	Row%	100.0%	30.4%	26.1%	0.0%	4.3%	17.4%	13.0%	8.7%	73.9%	26.1%
South Africa	Count	16	0	3	4	3	2	1	3	12	4
	Col %	40.0%	0.0%	33.3%	100.0%	75.0%	33.3%	20.0%	60.0%	40.0%	40.0%
	Row%	100.0%	0.0%	18.8%	25.0%	18.8%	12.5%	6.3%	18.8%	75.0%	25.0%
Zambia	Count	1	0	0	0	0	0	1	0	1	0
	Col %	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	20.0%	0.0%	3.3%	0.0%
	Row%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	100.0%	0.0%

able 28: Question 5d: Which country do you associate most a welcoming reception and environment?

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
imbabwe	Count	28	7	6	2	3	3	4	3	20	8
	Col %	70.0%	100.0%	66.7%	50.0%	75.0%	50.0%	80.0%	60.0%	66.7%	80.0%
	Row%	100.0%	25.0%	21.4%	7.1%	10.7%	10.7%	14.3%	10.7%	71.4%	28.6%
outh Africa	Count	12	0	3	2	1	3	1	2	10	2
	Col %	30.0%	0.0%	33.3%	50.0%	25.0%	50.0%	20.0%	40.0%	33.3%	20.0%
	Row%	100.0%	0.0%	25.0%	16.7%	8.3%	25.0%	8.3%	16.7%	83.3%	16.7%

able 29: Question 5e: Which country do you associate most with being very informative about the destination?

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
nbabwe	Count	24	6	7	1	2	2	3	3	17	7
	Col %	60.0%	85.7%	77.8%	25.0%	50.0%	33.3%	60.0%	60.0%	56.7%	70.0%
	Row%	100.0%	25.0%	29.2%	4.2%	8.3%	8.3%	12.5%	12.5%	70.8%	29.2%
uth Africa	Count	16	1	2	3	2	4	2	2	13	3
	Col %	40.0%	14.3%	22.2%	75.0%	50.0%	66.7%	40.0%	40.0%	43.3%	30.0%
	Row%	100.0%	6.3%	12.5%	18.8%	12.5%	25.0%	12.5%	12.5%	81.3%	18.8%

able 30: Question 5f: Which country do you associate most with wide product range/activities?

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
nbabwe	Count	30	7	6	2	3	3	5	4	22	8
	Col %	75.0%	100.0%	66.7%	50.0%	75.0%	50.0%	100.0%	80.0%	73.3%	80.0%
	Row%	100.0%	23.3%	20.0%	6.7%	10.0%	10.0%	16.7%	13.3%	73.3%	26.7%
uth Africa	Count	10	0	3	2	1	3	0	1	8	2
	Col %	25.0%	0.0%	33.3%	50.0%	25.0%	50.0%	0.0%	20.0%	26.7%	20.0%
	Row%	100.0%	0.0%	30.0%	20.0%	10.0%	30.0%	0.0%	10.0%	80.0%	20.0%

Table 31: Question 5g: Which country do you associate most with prompt follow up on requests?

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
Zimbabwe	Count	25	5	7	2	3	2	3	3	18	7
	Col %	62.5%	71.4%	77.8%	50.0%	75.0%	33.3%	60.0%	60.0%	60.0%	70.0%
	Row%	100.0%	20.0%	28.0%	8.0%	12.0%	8.0%	12.0%	12.0%	72.0%	28.0%
South Africa	Count	14	2	2	2	1	4	1	2	12	2
	Col %	35.0%	28.6%	22.2%	50.0%	25.0%	66.7%	20.0%	40.0%	40.0%	20.0%
	Row%	100.0%	14.3%	14.3%	14.3%	7.1%	28.6%	7.1%	14.3%	85.7%	14.3%
Zambia	Count	1	0	0	0	0	0	1	0	0	1
	Col %	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	20.0%	0.0%	0.0%	10.0%
	Row%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	100.0%

Table 32: Question 6a: Which country markets the Victoria Falls best in terms of product focus?

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
South Africa	Count	22	2	4	3	3	3	3	4	20	2
	Col %	55.0%	28.6%	44.4%	75.0%	75.0%	50.0%	60.0%	80.0%	66.7%	20.0%
	Row%	100.0%	9.1%	18.2%	13.6%	13.6%	13.6%	13.6%	18.2%	90.9%	9.1%
Zimbabwe	Count	17	5	4	1	1	3	2	1	10	7
	Col %	42.5%	71.4%	44.4%	25.0%	25.0%	50.0%	40.0%	20.0%	33.3%	70.0%
	Row%	100.0%	29.4%	23.5%	5.9%	5.9%	17.6%	11.8%	5.9%	58.8%	41.2%
Zambia	Count	1	0	1	0	0	0	0	0	0	1
	Col %	2.5%	0.0%	11.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.0%
	Row%	100.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%

Table 33: Question 6b: Which country markets the Victoria Falls best in terms of customer focus?

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
Zimbabwe	Count	28	7	6	1	3	5	4	2	19	9
	Col %	70.0%	100.0%	66.7%	25.0%	75.0%	83.3%	80.0%	40.0%	63.3%	90.0%
	Row%	100.0%	25.0%	21.4%	3.6%	10.7%	17.9%	14.3%	7.1%	67.9%	32.1%
South Africa	Count	12	0	3	3	1	1	1	3	11	1
	Col %	30.0%	0.0%	33.3%	75.0%	25.0%	16.7%	20.0%	60.0%	36.7%	10.0%
	Row%	100.0%	0.0%	25.0%	25.0%	8.3%	8.3%	8.3%	25.0%	91.7%	8.3%

Table 34: Question 6c: Which country markets the Victoria Falls best in terms of innovativeness?

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
Zimbabwe	Count	20	7	6	0	1	2	1	3	14	6
	Col %	50.0%	100.0%	66.7%	0.0%	25.0%	33.3%	20.0%	60.0%	46.7%	60.0%
	Row%	100.0%	35.0%	30.0%	0.0%	5.0%	10.0%	5.0%	15.0%	70.0%	30.0%
South Africa	Count	16	0	3	1	3	3	4	2	12	4
	Col %	40.0%	0.0%	33.3%	25.0%	75.0%	50.0%	80.0%	40.0%	40.0%	40.0%
	Row%	100.0%	0.0%	18.8%	6.3%	18.8%	18.8%	25.0%	12.5%	75.0%	25.0%
Zambia	Count	4	0	0	3	0	1	0	0	4	0
	Col %	10.00%	0.00%	0.00%	75.00%	0.00%	16.70%	0.00%	0.00%	13.30%	0.00%
	Row%	100.0%	0.0%	0.0%	75.0%	0.0%	25.0%	0.0%	0.0%	100.0%	0.0%

Table 35: Question 6d: Which country markets the Victoria Falls best in terms of technological efficiency?

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
South Africa	Count	31	3	6	4	4	5	5	4	23	8
	Col %	77.5%	42.9%	66.7%	100.0%	100.0%	83.3%	100.0%	80.0%	76.7%	80.0%
	Row%	100.0%	9.7%	19.4%	12.9%	12.9%	16.1%	16.1%	12.9%	74.2%	25.8%
Zimbabwe	Count	9	4	3	0	0	1	0	1	7	2
	Col %	22.5%	57.1%	33.3%	0.0%	0.0%	16.7%	0.0%	20.0%	23.3%	20.0%
	Row%	100.0%	44.4%	33.3%	0.0%	0.0%	11.1%	0.0%	11.1%	77.8%	22.2%

Table 36: Question 6e: Which country markets the Victoria Falls best in terms of operational efficiency?

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
South Africa	Count	22	1	3	3	3	5	4	3	19	3
	Col %	55.0%	14.3%	33.3%	75.0%	75.0%	83.3%	80.0%	60.0%	63.3%	30.0%
	Row%	100.0%	4.5%	13.6%	13.6%	13.6%	22.7%	18.2%	13.6%	86.4%	13.6%
Zimbabwe	Count	17	6	6	1	1	1	0	2	11	6
	Col %	42.5%	85.7%	66.7%	25.0%	25.0%	16.7%	0.0%	40.0%	36.7%	60.0%
	Row%	100.0%	35.3%	35.3%	5.9%	5.9%	5.9%	0.0%	11.8%	64.7%	35.3%
Zambia	Count	1	0	0	0	0	0	1	0	0	1
	Col %	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	20.0%	0.0%	0.0%	10.0%
	Row%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	100.0%

e 37: Question 6f: Which country markets the Victoria Falls best in terms of cost competitiveness?

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
abwe	Count	20	5	4	1	3	2	3	2	16	4
	Col %	50.0%	71.4%	44.4%	25.0%	75.0%	33.3%	60.0%	40.0%	53.3%	40.0%
	Row%	100.0%	25.0%	20.0%	5.0%	15.0%	10.0%	15.0%	10.0%	80.0%	20.0%
ia	Count	16	2	5	3	1	3	1	1	10	6
	Col %	40.0%	28.6%	55.6%	75.0%	25.0%	50.0%	20.0%	20.0%	33.3%	60.0%
	Row%	100.0%	12.5%	31.3%	18.8%	6.3%	18.8%	6.3%	6.3%	62.5%	37.5%
1 Africa	Count	4	0	0	0	0	1	1	2	4	0
	Col %	10.0%	0.0%	0.0%	0.0%	0.0%	16.7%	20.0%	40.0%	13.3%	0.0%
	Row%	100.0%	0.0%	0.0%	0.0%	0.0%	25.0%	25.0%	50.0%	100.0%	0.0%

Table 38: Question 7: What were the main leisure activities that you engaged in during your stay at Vic Falls?

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
	1	40	7	9	4	4	6	5	5	30	10
light of the ngels	Count	19	1	6	0	2	5	3	2	12	7
	Col %	48%	14%	67%	0%	50%	83%	60%	40%	40%	70%
	Row%	100%	5%	32%	0%	11%	26%	16%	11%	63%	37%
White water afting	Count	17	2	3	1	1	5	3	2	14	3
	Col %	43%	29%	33%	25%	25%	83%	60%	40%	47%	30%
	Row%	100%	12%	18%	6%	6%	29%	18%	12%	82%	18%
Canoeing	Count	15	3	1	0	2	4	3	2	12	3
	Col %	38%	43%	11%	0%	50%	67%	60%	40%	40%	30%
	Row%	100%	20%	7%	0%	13%	27%	20%	13%	80%	20%
Safaris	Count	15	3	3	2	2	2	3	0	12	3
	Col %	38%	43%	33%	50%	50%	33%	60%	0%	40%	30%
	Row%	100%	20%	20%	13%	13%	13%	20%	0%	80%	20%
Bunji jumping	Count	15	3	5	2	0	2	2	1	13	2
	Col %	38%	43%	56%	50%	0%	33%	40%	20%	43%	20%
	Row%	100%	20%	33%	13%	0%	13%	13%	7%	87%	13%
Elephant back safaris	Count	12	5	0	0	2	1	2	2	10	2
	Col %	30%	71%	0%	0%	50%	17%	40%	40%	33%	20%
	Row%	100%	42%	0%	0%	17%	8%	17%	17%	83%	17%
Kayaking	Count	10	2	1	0	0	3	2	2	8	2
	Col %	25%	29%	11%	0%	0%	50%	40%	40%	27%	20%
	Row%	100%	20%	10%	0%	0%	30%	20%	20%	80%	20%
Fishing	Count	8	3	1	0	1	0	0	3	6	2
	Col %	20%	43%	11%	0%	25%	0%	0%	60%	20%	20%
	Row%	100%	38%	13%	0%	13%	0%	0%	38%	75%	25%
Helicopter flips	Count	8	0	6	0	1	1	0	0	6	2
	Col %	20%	0%	67%	0%	25%	17%	0%	0%	20%	20%
	Row%	100%	0%	75%	0%	13%	13%	0%	0%	75%	25%
Golf	Count	6	0	2	0	0	2	1	1	6	0
	Col %	15%	0%	22%	0%	0%	33%	20%	20%	20%	0%
	Row%	100%	0%	33%	0%	0%	33%	17%	17%	100%	0%
Sundowner cruises	Count	4	0	0	1	1	0	1	1	3	1
	Col %	10%	0%	0%	25%	25%	0%	20%	20%	10%	10%
	Row%	100%	0%	0%	25%	25%	0%	25%	25%	75%	25%
None	Count	4	0	3	0	0	0	0	1	3	1
	Col %	10%	0%	33%	0%	0%	0%	0%	20%	10%	10%
	Row%	100%	0%	75%	0%	0%	0%	0%	25%	75%	25%
Micro lighting	Count	1	1	0	0	0	0	0	0	1	0
	Col %	3%	14%	0%	0%	0%	0%	0%	0%	3%	0%
	Row%	100%	100%	0%	0%	0%	0%	0%	0%	100%	0%

Table 39: Question 8: Which of the following modes of transport did you use during this trip?

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
	1	40	7	9	4	4	6	5	5	30	10
ir travel	Count	37	6	9	4	3	5	5	5	27	10
	Col %	93%	86%	100%	100%	75%	83%	100%	100%	90%	100%
	Row%	100%	16%	24%	11%	8%	14%	14%	14%	73%	27%
our bus	Count	30	7	5	2	4	6	3	3	20	10
	Col %	75%	100%	56%	50%	100%	100%	60%	60%	67%	100%
	Row%	100%	23%	17%	7%	13%	20%	10%	10%	67%	33%
ental car	Count	5	0	2	0	0	1	1	1	5	0
	Col %	13%	0%	22%	0%	0%	17%	20%	20%	17%	0%
	Row%	100%	0%	40%	0%	0%	20%	20%	20%	100%	0%

Table 40: Question 9: How many nights did you actually spend at the Victoria Falls?

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
our nights	Count	13	4	5	0	1	1	2	0	11	2
	Col %	32.5%	57.1%	55.6%	0.0%	25.0%	16.7%	40.0%	0.0%	36.7%	20.0%
	Row%	100.0%	30.8%	38.5%	0.0%	7.7%	7.7%	15.4%	0.0%	84.6%	15.4%
hree nights	Count	9	0	2	2	0	2	1	2	5	4
	Col %	22.5%	0.0%	22.2%	50.0%	0.0%	33.3%	20.0%	40.0%	16.7%	40.0%
	Row%	100.0%	0.0%	22.2%	22.2%	0.0%	22.2%	11.1%	22.2%	55.6%	44.4%
wo nights	Count	8	2	0	1	3	1	1	0	7	1
	Col %	20.0%	28.6%	0.0%	25.0%	75.0%	16.7%	20.0%	0.0%	23.3%	10.0%
	Row%	100.0%	25.0%	0.0%	12.5%	37.5%	12.5%	12.5%	0.0%	87.5%	12.5%
ive nights	Count	7	0	2	0	0	2	1	2	6	1
	Col %	17.5%	0.0%	22.2%	0.0%	0.0%	33.3%	20.0%	40.0%	20.0%	10.0%
	Row%	100.0%	0.0%	28.6%	0.0%	0.0%	28.6%	14.3%	28.6%	85.7%	14.3%
annot	Count	3	1	0	1	0	0	0	1	1	2
emember	Col %	7.5%	14.3%	0.0%	25.0%	0.0%	0.0%	0.0%	20.0%	3.3%	20.0%
	Row%	100.0%	33.3%	0.0%	33.3%	0.0%	0.0%	0.0%	33.3%	33.3%	66.7%

Table 41: Question 10: What is the total number of visits that you have made to the Vic Falls in the past 2 years?											
			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
Once	Count	34	7	8	3	2	4	5	5	25	9
	Col %	85.0%	100.0%	88.9%	75.0%	50.0%	66.7%	100.0%	100.0%	83.3%	90.0%
	Row%	100.0%	20.6%	23.5%	8.8%	5.9%	11.8%	14.7%	14.7%	73.5%	26.5%
Twice	Count	3	0	1	0	1	1	0	0	3	0
	Col %	7.5%	0.0%	11.1%	0.0%	25.0%	16.7%	0.0%	0.0%	10.0%	0.0%
	Row%	100.0%	0.0%	33.3%	0.0%	33.3%	33.3%	0.0%	0.0%	100.0%	0.0%
Three times	Count	2	0	0	0	1	1	0	0	1	1
	Col %	5.0%	0.0%	0.0%	0.0%	25.0%	16.7%	0.0%	0.0%	3.3%	10.0%
	Row%	100.0%	0.0%	0.0%	0.0%	50.0%	50.0%	0.0%	0.0%	50.0%	50.0%
Four times	Count	1	0	0	1	0	0	0	0	1	0
	Col %	2.5%	0.0%	0.0%	25.0%	0.0%	0.0%	0.0%	0.0%	3.3%	0.0%
	Row%	100.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%

Table 42: Question 11a: Do you plan to return to the Vic Falls?											
			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
Yes	Count	32	7	7	2	2	5	4	5	23	9
	Col %	84.2%	100.0%	87.5%	50.0%	50.0%	83.3%	100.0%	100.0%	79.3%	100.0%
	Row%	100.0%	21.9%	21.9%	6.3%	6.3%	15.6%	12.5%	15.6%	71.9%	28.1%
No	Count	5	0	1	2	2	0	0	0	5	0
	Col %	13.2%	0.0%	12.5%	50.0%	50.0%	0.0%	0.0%	0.0%	17.2%	0.0%
	Row%	100.0%	0.0%	20.0%	40.0%	40.0%	0.0%	0.0%	0.0%	100.0%	0.0%
Not sure	Count	1	0	0	0	0	1	0	0	1	0
	Col %	2.6%	0.0%	0.0%	0.0%	0.0%	16.7%	0.0%	0.0%	3.4%	0.0%
	Row%	100.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	100.0%	0.0%

Table 43: Question 11b: Plese explain why?

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
	1	32	7	7	2	2	5	4	5	23	9
he place is ery beautiful	Count	10	2	1	0	2	3	1	1	7	3
	Col %	31%	29%	14%	0%	100%	60%	25%	20%	30%	33%
	Row%	100%	20%	10%	0%	20%	30%	10%	10%	70%	30%
just want to eturn	Count	7	0	0	2	0	3	0	2	5	2
	Col %	22%	0%	0%	100%	0%	60%	0%	40%	22%	22%
	Row%	100%	0%	0%	29%	0%	43%	0%	29%	71%	29%
Good tmosphere	Count	5	1	2	0	0	0	1	1	3	2
	Col %	16%	14%	29%	0%	0%	0%	25%	20%	13%	22%
	Row%	100%	20%	40%	0%	0%	0%	20%	20%	60%	40%
Need for fun nd entertainment	Count	4	3	0	0	0	1	0	0	4	0
	Col %	13%	43%	0%	0%	0%	20%	0%	0%	17%	0%
	Row%	100%	75%	0%	0%	0%	25%	0%	0%	100%	0%
There are a ot of ttractions	Count	3	1	0	0	0	1	1	0	3	0
	Col %	9%	14%	0%	0%	0%	20%	25%	0%	13%	0%
	Row%	100%	33%	0%	0%	0%	33%	33%	0%	100%	0%
To see Victoria falls again after	Count	3	0	2	0	0	0	0	1	3	0
	Col %	9%	0%	29%	0%	0%	0%	0%	20%	13%	0%
	Row%	100%	0%	67%	0%	0%	0%	0%	33%	100%	0%
To bring my elatives	Count	3	0	2	0	0	0	1	0	1	2
	Col %	9%	0%	29%	0%	0%	0%	25%	0%	4%	22%
	Row%	100%	0%	67%	0%	0%	0%	33%	0%	33%	67%

Table 44: Question 12a: Would you recommend the Vic Falls as a holiday destination to family or friends?

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
Yes	Count	40	7	9	4	4	6	5	5	30	10
	Col%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%

Table 45: Question 12b: Please explain why.

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
	1	40	7	9	4	4	6	5	5	30	10
The place is good	Count	13	2	4	2	0	1	2	2	12	1
	Col %	33%	29%	44%	50%	0%	17%	50%	40%	40%	11%
	Row%	100%	15%	31%	15%	0%	8%	15%	15%	92%	8%
It is good for all ages	Count	6	0	2	0	1	1	0	2	2	4
	Col %	15%	0%	22%	0%	25%	17%	0%	40%	7%	44%
	Row%	100%	0%	33%	0%	17%	17%	0%	33%	33%	67%
Theres a lot of entertainment	Count	6	2	0	0	1	2	0	1	4	2
	Col %	15%	29%	0%	0%	25%	33%	0%	20%	13%	22%
	Row%	100%	33%	0%	0%	17%	33%	0%	17%	67%	33%
Friendly staff	Count	5	2	0	2	1	0	0	0	5	0
	Col %	13%	29%	0%	50%	25%	0%	0%	0%	17%	0%
	Row%	100%	40%	0%	40%	20%	0%	0%	0%	100%	0%
Its educational	Count	4	1	2	0	0	1	0	0	4	0
	Col %	10%	14%	22%	0%	0%	17%	0%	0%	13%	0%
	Row%	100%	25%	50%	0%	0%	25%	0%	0%	100%	0%
Just want to bring them	Count	3	1	0	2	0	0	0	0	3	0
	Col %	8%	14%	0%	50%	0%	0%	0%	0%	10%	0%
	Row%	100%	33%	0%	67%	0%	0%	0%	0%	100%	0%
Influencing my friend to join me	Count	2	0	0	0	1	1	0	0	2	0
	Col %	5%	0%	0%	0%	25%	17%	0%	0%	7%	0%
	Row%	100%	0%	0%	0%	50%	50%	0%	0%	100%	0%
It is nearer to Zambia	Count	2	0	1	0	0	0	1	0	1	1
	Col %	5%	0%	11%	0%	0%	0%	25%	0%	3%	11%
	Row%	100%	0%	50%	0%	0%	0%	50%	0%	50%	50%
It is money worth	Count	2	0	1	0	0	0	1	0	1	1
	Col %	5%	0%	11%	0%	0%	0%	25%	0%	3%	11%
	Row%	100%	0%	50%	0%	0%	0%	50%	0%	50%	50%
Need to keep records of the tour	Count	1	0	0	0	1	0	0	0	1	0
	Col %	3%	0%	0%	0%	25%	0%	0%	0%	3%	0%
	Row%	100%	0%	0%	0%	100%	0%	0%	0%	100%	0%

Table 46: Question 13: How far in advance did you plan this trip?

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
More than 1 month	Count	16	2	4	2	2	3	1	2	12	4
	Col %	40.0%	28.6%	44.4%	50.0%	50.0%	50.0%	20.0%	40.0%	40.0%	40.0%
	Row%	100.0%	12.5%	25.0%	12.5%	12.5%	18.8%	6.3%	12.5%	75.0%	25.0%
More than 2 months	Count	14	4	2	1	1	1	3	2	13	1
	Col %	35.0%	57.1%	22.2%	25.0%	25.0%	16.7%	60.0%	40.0%	43.3%	10.0%
	Row%	100.0%	28.6%	14.3%	7.1%	7.1%	7.1%	21.4%	14.3%	92.9%	7.1%
3-4 weeks	Count	6	1	2	1	1	1	0	0	3	3
	Col %	15.0%	14.3%	22.2%	25.0%	25.0%	16.7%	0.0%	0.0%	10.0%	30.0%
	Row%	100.0%	16.7%	33.3%	16.7%	16.7%	16.7%	0.0%	0.0%	50.0%	50.0%
Longer	Count	4	0	1	0	0	1	1	1	2	2
	Col %	10.0%	0.0%	11.1%	0.0%	0.0%	16.7%	20.0%	20.0%	6.7%	20.0%
	Row%	100.0%	0.0%	25.0%	0.0%	0.0%	25.0%	25.0%	25.0%	50.0%	50.0%

Table 47: Question 14: Was there anything that you wanted to buy or do at the Vic Falls that you could not find or do?

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
No	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%

Table 48: Question 15: Rating of the experience at the hotel/lodge you were accommodated

	Mean Score
Choice/variety of facilities	4.50
Cleanliness	4.28
Decor/furnishings	4.15
Heating/cooling	3.63
Service	4.30
Value (quality for amount paid)	4.50

Table 49: Question 16: Rating of the experience at local restaurants	
	Mean Score
Choice/variety of facilities	4.45
Cleanliness	4.28
Decor/furnishings	4.15
Heating/cooling	3.50
Service	4.35
Value (quality for amount paid)	4.55

Table 50: Question 17: Rating of the local attractions at Victoria Falls	
	Mean Score
Quality of displays/views	4.50
Entertainment value	4.35
Guides/Staff	4.45
Service	4.53
Accessibility (ease of locating)	4.05
Parking	3.68
Hours/days of operation	3.88
Availability of unique gifts / souvenirs	3.55

Table 51: Question 18: Are these ratings for a specific attraction?

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
No	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%

Table 52: Question 19: What suggestions do you have for improving the Victoria Falls as a key tourist destination

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
	1	40	7	9	4	4	6	5	5	30	10
mprove oad signs	Count	14	1	5	0	2	3	1	2	10	4
	Col %	38%	25%	56%	0%	50%	50%	20%	40%	37%	40%
	Row%	100%	7%	36%	0%	14%	21%	7%	14%	71%	29%
'rovide naps to the rea	Count	14	0	4	3	2	2	3	0	11	3
	Col %	38%	0%	44%	75%	50%	33%	60%	0%	41%	30%
	Row%	100%	0%	29%	21%	14%	14%	21%	0%	79%	21%
Clean up the own	Count	14	3	2	1	2	2	3	1	11	3
	Col %	38%	75%	22%	25%	50%	33%	60%	20%	41%	30%
	Row%	100%	21%	14%	7%	14%	14%	21%	7%	79%	21%
mprove juality of oads	Count	10	0	2	2	0	2	1	3	8	2
	Col %	27%	0%	22%	50%	0%	33%	20%	60%	30%	20%
	Row%	100%	0%	20%	20%	0%	20%	10%	30%	80%	20%
'rovide better access o view	Count	8	0	4	2	2	0	0	0	5	3
	Col %	22%	0%	44%	50%	50%	0%	0%	0%	19%	30%
	Row%	100%	0%	50%	25%	25%	0%	0%	0%	63%	38%
Keep stores open later'	Count	5	0	0	1	3	0	1	0	4	1
	Col %	14%	0%	0%	25%	75%	0%	20%	0%	15%	10%
	Row%	100%	0%	0%	20%	60%	0%	20%	0%	80%	20%
'rovide more police patrols	Count	5	0	1	0	2	2	0	0	4	1
	Col %	14%	0%	11%	0%	50%	33%	0%	0%	15%	10%
	Row%	100%	0%	20%	0%	40%	40%	0%	0%	80%	20%
Add more decorating rees to the	Count	2	1	0	0	0	0	0	1	1	1
	Col %	5%	25%	0%	0%	0%	0%	0%	20%	4%	10%
	Row%	100%	50%	0%	0%	0%	0%	0%	50%	50%	50%
No comment	Count	1	1	0	0	0	0	0	0	1	0
	Col %	3%	25%	0%	0%	0%	0%	0%	0%	4%	0%
	Row%	100%	100%	0%	0%	0%	0%	0%	0%	100%	0%
Improve how businesses reat customers	Count	1	0	0	0	0	0	1	0	1	0
	Col %	3%	0%	0%	0%	0%	0%	20%	0%	4%	0%
	Row%	100%	0%	0%	0%	0%	0%	100%	0%	100%	0%

Table 53: Question 20: Indicate the number of members of the party you are traveling with?

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
Two	Count	18	2	4	2	3	4	2	1	11	7
	Col %	45.0%	28.6%	44.4%	50.0%	75.0%	66.7%	40.0%	20.0%	36.7%	70.0%
	Row%	100.0%	11.1%	22.2%	11.1%	16.7%	22.2%	11.1%	5.6%	61.1%	38.9%
Three	Count	12	0	5	1	0	0	3	3	10	2
	Col %	30.0%	0.0%	55.6%	25.0%	0.0%	0.0%	60.0%	60.0%	33.3%	20.0%
	Row%	100.0%	0.0%	41.7%	8.3%	0.0%	0.0%	25.0%	25.0%	83.3%	16.7%
Five	Count	4	2	0	0	0	2	0	0	4	0
	Col %	10.0%	28.6%	0.0%	0.0%	0.0%	33.3%	0.0%	0.0%	13.3%	0.0%
	Row%	100.0%	50.0%	0.0%	0.0%	0.0%	50.0%	0.0%	0.0%	100.0%	0.0%
Eight	Count	3	3	0	0	0	0	0	0	2	1
	Col %	7.5%	42.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.7%	10.0%
	Row%	100.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	66.7%	33.3%
Alone	Count	1	0	0	0	1	0	0	0	1	0
	Col %	2.5%	0.0%	0.0%	0.0%	25.0%	0.0%	0.0%	0.0%	3.3%	0.0%
	Row%	100.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	100.0%	0.0%
Four	Count	1	0	0	0	0	0	0	1	1	0
	Col %	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	20.0%	3.3%	0.0%
	Row%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	100.0%	0.0%
Six	Count	1	0	0	1	0	0	0	0	1	0
	Col %	2.5%	0.0%	0.0%	25.0%	0.0%	0.0%	0.0%	0.0%	3.3%	0.0%
	Row%	100.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%

Table 55: Question 22: What is your profession?

			COUNTRY OF ORIGIN							GENDER	
		1	China	USA	Hungary	India	UK	Australia	Canada	Male	Female
1	Count	40	7	9	4	4	6	5	5	30	10
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Row%	100.0%	17.5%	22.5%	10.0%	10.0%	15.0%	12.5%	12.5%	75.0%	25.0%
Administrative/executive	Count	13	0	3	1	3	4	0	2	12	1
	Col %	32.5%	0.0%	33.3%	25.0%	75.0%	66.7%	0.0%	40.0%	40.0%	10.0%
	Row%	100.0%	0.0%	23.1%	7.7%	23.1%	30.8%	0.0%	15.4%	92.3%	7.7%
Professional technical	Count	10	6	0	2	0	0	1	1	8	2
	Col %	25.0%	85.7%	0.0%	50.0%	0.0%	0.0%	20.0%	20.0%	26.7%	20.0%
	Row%	100.0%	60.0%	0.0%	20.0%	0.0%	0.0%	10.0%	10.0%	80.0%	20.0%
Middle management	Count	9	0	3	0	1	1	2	2	6	3
	Col %	22.5%	0.0%	33.3%	0.0%	25.0%	16.7%	40.0%	40.0%	20.0%	30.0%
	Row%	100.0%	0.0%	33.3%	0.0%	11.1%	11.1%	22.2%	22.2%	66.7%	33.3%
Student	Count	6	0	3	1	0	1	1	0	2	4
	Col %	15.0%	0.0%	33.3%	25.0%	0.0%	16.7%	20.0%	0.0%	6.7%	40.0%
	Row%	100.0%	0.0%	50.0%	16.7%	0.0%	16.7%	16.7%	0.0%	33.3%	66.7%
Retired	Count	2	1	0	0	0	0	1	0	2	0
	Col %	5.0%	14.3%	0.0%	0.0%	0.0%	0.0%	20.0%	0.0%	6.7%	0.0%
	Row%	100.0%	50.0%	0.0%	0.0%	0.0%	0.0%	50.0%	0.0%	100.0%	0.0%