

STRATEGIES FOR DEVELOPING DOMESTIC TOURISM: A SURVEY OF KEY STAKEHOLDERS IN NAMIBIA

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ABSTRACT

The tourism industry, which is often referred to as an “invisible export”, is significant in the economic and social development of a country. In Namibia, tourism is ranked the third highest foreign currency earner and constitutes one of the economy’s cornerstones of revenue generation. Traditionally developing countries such as Namibia have relied heavily on international tourist arrivals, often at the expense of promoting domestic tourism. In spite of this, domestic tourism has grown rapidly to become one of the world’s foremost economic phenomena. A significant number of countries in Africa have already realized the potentially positive economic impacts of domestic tourism and have taken steps to develop and implement domestic tourism strategies. Such a strategy has however not yet been formulated in Namibia, in spite of the fact that, according to the available statistics, domestic tourism in Namibia has considerable growth potential.

To get more clarity on Namibia’s domestic tourism potential, a study was undertaken to determine domestic tourism expenditure patterns in Namibia; to identify the current constraints; and to ascertain the potential contribution of domestic tourism business. The empirical survey was conducted among 200 key tourism stakeholders involved in and/or impacting on Namibia’s current and potential domestic tourism market. The stakeholders included tourism representative bodies, tour operators, lodges, hotels, attractions facilities, travel agents and other relevant stakeholders.

The results show that there is a great potential for domestic tourism in Namibia. However, there is a need to develop a participative and integrated domestic tourism strategy that will enable the industry to tap this market potential in a sustainable and competitive manner. Key recommendations emanating from the study focus on the identification and prioritization of preferred destinations and attractions for the domestic market; the need to ensure accessible and affordable transport to tourism attractions and routes; and the importance of ensuring value for money and affordability of the current offerings to current and prospective domestic tourists. Based on the outcomes of the study, marketing guidelines are proposed that can lead to an increase in domestic tourism business capacity and enhance Namibia’s overall tourism sustainable competitiveness.

1.1 BACKGROUND TO THE STUDY

The tourism industry has become the cornerstone of economic development for the poor countries thus contributing a major input into the socio-economic development process (Lickorish & Jenkins 1997:209). Tourism is viewed as a growth sector offering growth opportunities which other export commodities do not have (Vanhove, 2005:16). The major tourist generating countries are located in the so called developed regions of the world (Lickorish & Jenkins, 1997). These developed countries have the hard currency which is important for and is sought after by most developing countries economies (Dieke, 2000). Tourism has been favored also over some of the export products since it is not faced by tariff

or quota barriers. As a result most developing countries have put tourism on the top of their economic development agenda.

Due to over dependence on international tourism, developing countries have not come up with strategies to encourage and tap into the vast potential in the domestic tourism market. For instance, domestic tourism can contribute more than 30% to a country's Gross Domestic Product (GDP) (Wilson & Fesenmaier, 2001:132). The World Tourism Organization (WTO) and the United Nations Statistical Commission have established a statistical methodological framework, Tourism satellite accounts (TSA) which articulates more precisely the significance of domestic tourism (Domestic Tourism growth strategy, 2006). Like many other developing countries, Namibia needs to develop a strategy that can be used to tap into the existing domestic tourism potential.

Tourism can contribute to approximately 60% of the total tourism economy as a result of domestic tourism consumption (Crockett, Shane and Wood, 1999:276). Studies that have been carried out in developed countries have proved that out of the 60% revenue generated from tourism activities, 70% comes from domestic tourism (Crockett et al, 1999). Therefore, domestic tourism can play a pivotal role too in the economic development of a country such as Namibia.

Domestic tourism can lead to a number of benefits to the destination. An increase in the number of Namibian people traveling for leisure has a ripple effect on the growth of the economy. Domestic tourism tends to lead to an increase in employment, improve standards of living of the host community and development of attractions.

1.2 STATEMENT OF THE PROBLEM

Although tourism is historically a growth sector in the global economy, this growth does not apply to all the countries. Africa has received low numbers of international tourist arrivals while Asian countries, India and Thailand have enjoyed high growth rate in international tourists' arrivals. While tourism brings foreign currency into the country some of this currency leaks out to support imports in the tourism sector. Tourism is generally accepted as employment sensitive as it often employs intensive low skilled people. Tourism can lead to tourism infrastructural development. Therefore, to what

extent can Namibia tap into the potential domestic tourism to sustain the most contested international tourist arrivals?

1.3 OBJECTIVES OF THE STUDY

The main objectives of the study are:

- To establish the potential of domestic tourism in Namibia
- To identify the marketing strategies that can be employed in order to tap on the existing domestic tourism.
- To bring awareness to tourism players on the important role of domestic tourism in Namibia
- To develop conclusions and recommendations on future prospects of domestic tourism in Namibia.

2. LITERATURE REVIEW

Tourism is made up of tourists' activities that are undertaken within the destination (Domestic Tourism Strategy, 2006). Tourists are classified into either domestic or international tourists. International tourists consist of visitors traveling from outside their borders to other countries for the purposes of leisure travel or business (Dieke, 2000).

Domestic tourists comprise of locals traveling within their own country for the purpose of visiting friends and relatives or traveling for leisure. According to Moseley et al, (2007:17) domestic tourists are visitors within the country of residence or persons on a trip within the country of residence not taking into consideration the purpose of traveling or any other factor. It excludes residents traveling to set up their own usual residence in that place or for remunerative work on other parts of the country or a person traveling regularly within the country different destinations within a country (Deng, King & Bauer, 2002:422). The growth of domestic tourism has led to the realization of the important role of domestic tourism. As a result, many countries have taken steps towards the implementation of a variety of tourist attractions that appeal to the local market (Crouch & David, 2005:17). Destination Marketing Organizations (DMOs) across Africa have recently started collecting data on domestic tourism expenditure patterns.

Trends (travel propensity) of domestic tourists in Namibia

Globally domestic tourism has continued to grow. In developed countries domestic tourism contributes to 60% of the total tourist revenue. According to the WTO (2005) domestic tourism has led to employment creation, high economic growth and the overall development of the tourism industry. Namibia is one of the most productive economies in Sub-Saharan Africa (Country Report, 2006). In 2005, Namibia's per capita gross domestic products (GDP) was US\$3,022 this indicator has shown a sturdy increase within the past several years making it one of the highest in Southern Africa (Tapscott, 1993:36). Official publications (Vision 2030) and National Development plan 3 (NDP-3) have ranked tourism the 3rd foreign currency earner and one of the fastest growing industries (Tapscott, 1993; Country Report, 2006).

Based on the country's unique history, Namibians have been restricted in their ability to enjoy domestic tourism. The majority of the population, who are blacks, are still unemployed, they own very little land and they have no access to the scarce limited resources (Tapscott, 1993). As a result the bottom 55% of the population controls only 3% of the GDP and lives in extreme poverty (Tapscott, 1993). These economic disparities have continued to limit the propensity to travel and participate in domestic tourism by the Namibians. According to the United Nations (2007), the rate of unemployment could be higher if one includes under-employment. Based on its unique history, Namibians have been restricted on their ability to enjoy domestic tourism. However, an opportunity exist for domestic tourism especially the business people, the emerging entrepreneurs and the visit friends and relatives (VFR) segment.

Market segmentation

Market segmentation can be defined as the sub-division of the total market into discrete and identifiable market segments according to clearly defined characteristics (Fyall & Garrod, 2005; George, 2007:268). There are a number of categories that can be used to segment the market. According to Seaton and Bennett (1996) the most basic segmentation strategy is segmenting the market using trip or tourist descriptors. Trip descriptors divide the market into smaller groups based on the type of trip the consumers would like to engage on.

Descriptors can include VFR, holiday and recreational trips as well business as trips. Market segmentation could also be achieved through the use of specific social characteristics such as cultural background, social class, and family groups. It could also observe the use of geographical, psychological (motivation, perception, beliefs, and values) personal (age, occupation, lifestyle, personality and income) behavioral (number of trips, purchases and expenditures and past travel) and time (seasonality, weekends vs weekdays) (Fyall & Garrod, 2005; Seaton & Bennett, 1996). Effective use of segmentation can help the marketers to reach out to domestic tourist in a more effective way by using different marketing programs for the different groups (George, 2007:268).

Marketing strategies that attract domestic tourists

A strategy is a plan of action through which an organization intends to reach its objectives (Stanton, Etzel, Alker, Abratt, Pitt & Staude, 1992). Marketing strategies therefore relate to how marketers seek to meet their objectives and usually points to the destination's main lines of direction (George, 2001) A tactic is an operational means by which a strategy is to be implemented or activated (Stanton et al. 1992). A tactic is more specific, detailed course of action than a strategy. Marketing tactics vary from advertising, promotion, publicity, pricing to product development and other salient means including word of mouth, travel expos and road shows. Marketing mix is one of the fundamental tools in marketing (George, 2007) and the four 'Ps' are the main factors that need to be mixed in order to enable a tourism business to achieve its marketing objectives. Tourism marketing involves finding out what tourists want (marketing research) and developing suitable offerings (product offering development), telling them what is available (promotions) and providing instructions as to where they can buy the offerings (place) so that they in turn receive value (pricing) and the tourism organizations make money (George, 2007:270).

3. RESEARCH METHODOLOGY

A quantitative research design is the most popular research method used within the tourism industry (Milman, 1993). It pertains to data and large quantities of information that is analyzed statistically (Decrop, 1999:57). The empirical research was administered through questionnaires

which were distributed through the internet. The questionnaire design was structured in the form of open, rating, scaling and closed questions. In addition the design of the questionnaire was meant to probe the respondents beyond the reach of the researcher (Boone, 2004). The survey population comprised travel agents; tour operators; attractions; representative bodies of tourism organizations; hotels; and bed and breakfast facilities.

A total of 200 questionnaires were distributed through the internet which yielded a response rate of 15%. Due to the disadvantages associated with the Internet, the response rate achieved was thought to be significant and the findings valid (Jonker, 2004). The sample population was chosen from the directory of all the tourism operators in Namibia. The sampling was purposive which gave the researcher a chance to select those reputable organizations that could give unbiased inputs.

Whilst the probability sampling is widely used method, in this study the researchers could not employ this method due to the data collection method that was employed (Berg, 2007). The data collected was then analyzed, discussed and tabulated through the use of simple tables for clarity and findings were then summarized and reported.

4. RESULTS OF THE EMPIRICAL SURVEY

The empirical results of the study are analyzed and discussed based on the outcomes of the study. The aim of the study was to carry out an investigation on the strategies that are employed to market domestic tourism in Namibia. The survey which was conducted through the use of the internet where questionnaires were distributed to stakeholders in various tourism entities is now discussed and analyzed.

4.1 General information

As indicated before 200 questionnaires distributed through the internet, a 15% response rate was achieved. The percentage was considered satisfactory considering the disadvantages associated with the method. The sample population was a mixture of both industry professionals and practitioners which made the findings valid and reliable. 30% of the respondents were the tourism representative bodies, 30% were the private sector stakeholders, 10% were the destination marketing organization and 3% were the airlines focusing on Namibia. The statistics on the type of organizations was analyzed and categorized on the table below.

The private sector stakeholders chosen for the study included Tourist attractions (13%), accommodation facilities (30%), conference facilities (10%) game lodges (20%) distribution channel (30%), airlines 6.6% and ground transport (16.6%).

The distribution of the respondents made the results of the study valid.

Most of the respondents had an estimated domestic tourism profile that ranged from 0-10 (26.6) to 20-30 (26.6%) while those with international tourism arrivals ranged from 90-100 (26.6) and 70-80 (26.6%). The results show that most operators concentrated on international tourism arrivals at the expense of domestic tourism. The results of the estimated business distribution between the domestic and international tourism are shown below.

The respondents were not new comers in the tourism industry. 46% of the responses came from organizations that have been in the tourism industry for more than 10 years. 36.6% had 6-10 years in the industry while only 16.6% had 1-5 years in the industry.

Table: 1 Type of organizations

Type of organization	% Responses
Tourism representative body	30
Destination marketing organization	10
Private sector stakeholder with an international tourism product	30
Airline focusing on Namibia	3
Other	26.6

Table: 2 Private Sector Stakeholders.

Type of stakeholder	% Responses
Tourist attraction	13
Accommodation facility	30
Conference facility	10
Game lodge/nature reserve	20
Distribution channel (e.g. tour operator/travel agent)	30
Airline	6.6
Ground transport (rail, coach, car rental, etc.)	16.6

Table:3 Estimated percentage shares of domestic and international business

Business	Percentage share of domestic and international tourists	Response
Domestic	0-10	26.6
	10-20	33.3
	20-30	26.6
	30-40	13.3
International	90-100	26.6
	70-80	33.3
	70-80	26.6
	60-70	13.3

Table:4 Length of time the organizations have been in operation

Number of years	Percentage
1 - 5 years	16.6
6 – 10 years	36.6
Longer than 10 years	46.6

4.2 Awareness of domestic tourism in Namibia

The study targeted the tourism and hospitality operators in Namibia. Most respondents' demonstrated a meaningful understanding of domestic tourism. The responses varied. The Respondents' understanding of domestic tourism ranged from visitors from 'Namibia itself', to some respondents indicating that domestic tourism is when Namibians travel and stay in places inside Namibia but outside their usual environment for not more than one consecutive year for leisure, business or other purposes. As shown by the respondents, domestic tourism as a concept is well understood by most tourism operators including its accumulative benefits. It was interesting to note that some respondents even included the traveling of residents within the country to visit their family friends and relatives and also taking part in a vacation.

A number of respondents agreed that there were domestic seasons in Namibia. They highlighted the Christmas period, Easter holidays and School holidays. It emerged from the study that a lot of Namibians prefer to go to the village than visiting areas of interest.

It was encouraging to note that a number of respondents recognized that a lot of Namibians want to travel but the hindrances include inaccessibility high prices and lack of promotion. In order to mitigate the lack of promotion, respondents recommended aggressive marketing strategies to be employed in order to appeal to the domestic tourism market. Most respondents acknowledged that domestic tourism has a big potential for the small businesses but noted that only 20% of the small businesses' total occupancy is from domestic tourists.

Regarding prices Respondents said the prices were steep and beyond the income bracket of the majority of Namibians. Tourism places were considered extremely expensive for Namibians even though tourism enterprises have introduced a tier pricing system that provides a marked difference between the price paid by the locals and the international tourists.

A number of respondents indicated that the most important incentive that can be used to lure the domestic market is the offer of discounts. Some also argued that more emphasis should be

placed on local advertisements promoting special Namibian rates. Respondents indicated that domestic tourism is hardly promoted in Namibia in and this is compounded by high prices which inhibits and restricts domestic tourists. Therefore, the emphasis was place on making Namibians feel more comfortable and developing a more holistic approach to domestic tourism. The approach would encourage locals to travel in their own country and appreciate the value of tourism.

4.3 Methods used to market domestic tourism in Namibia

4.3.1 Most commonly used methods to market domestic tourism

The aim was to determine the most commonly used strategy for domestic tourism promotion. The views of the respondents were varied on the methods used for domestic tourism in Namibia. 40% of the respondents indicated that the most commonly used strategy for promoting domestic tourism were the price discounts.

In respect of advertising, print media was acknowledged as being used most often which was followed by direct sales. Respondents indicated that the internet is used to a lesser degree in marketing domestic tourism. The internet is a strategic tool for marketing tourism opportunities, but it seems Namibian operators have not tapped into the optimum potential use of this tool.

26.6% of the respondents felt that promotion was not done at all, while 23% felt that promotion of domestic tourism is done satisfactorily. Group discounts of domestic tourists are not in place nor are the use of special packages, incentives and competitions widespread. These methods need to be pursued vigorously by tourism operators in order to win domestic tourists.

Publicity is one of the most commonly used marketing tool because it is cheap and does not require expertise, respondents felt that tourism operators rarely used this approach. Operators need to use periodicals, news letters, special events and public relations exercises to market domestic tourism. 26% of the respondents felt that a product designed specifically for the domestic market has not been developed yet nor existing

ones customized to suit the local tastes. Yet another 26% felt that it was rarely used.

Based on the outcomes of this factor, the operators need to make some improvements on the product, its quality and service in order to suit the local tastes (Dieke, 2000). This implies that the product needs to be customized by extending the product range, availability and accessibility.

Other strategies that were mentioned included the use of word of mouth, travel expos and road shows of which 30% respondents felt that these tools were rarely used, the operators only capitalized on the opportunities created by the Namibia Tourism Board which is not enough if domestic tourism has to be taped into as a potential market. The table shown below shows the responses regarding the methods commonly used to promote domestic tourism.

4.3.2 Current strategies being used to market domestic tourism in Namibia

Respondents were asked to rate the current strategies that are used to promote domestic tourism in Namibia. 34% of the respondents felt that domestic tourism promotion was rarely used but 30% were of the opinion that domestic tourism was mostly promoted in Namibia. It will seem a number of respondents relied on the domestic tourism strategies employed by Namibia Tourism Board (NTB). 29.6% of the respondents felt that there is no promotion of product specific experiences to Namibians. 34.6 of the respondents thought that the operators need to develop product specific packages in order to attract domestic tourists. This should be complemented by the distribution of information to specific places (30.6%). Some respondents (40%) felt that there is need to encourage repeat visit by the domestic tourists. The table below shows the views of the respondents regarding domestic tourism strategies employed in Namibia.

4.4 Future strategies for marketing domestic tourism in Namibia

In order to encourage domestic tourism in Namibia, respondents felt that there is need to increase value

for money for the locals on products on offer (30%). There is need to matching product and services to consumers' needs i.e. longer stays, experience and activities (56.6%). 43.3% of the respondents indicated that operators need to provide group travel which is affordable and alternatively use travel vouchers as an option. 36.6% were of the opinion that in order to encourage more group travel, there is need to promote the use special rates during low seasons. Some respondents were of the view that in order to boost inter-provincial travel there is need to promote touring and to publicize hidden secrets in different regions and experiences. The future growth strategies were analyzed and summarized in the table below.

As shown on the table above, the respondents were of the opinion that there is need to make use of special events to target domestic tourists in order to reduce seasonality problems by providing customized services.

5. CONCLUSIONS

The study has concluded that there is an in-depth understanding of the role that can be played by domestic tourism. It emerged from the study that there is indeed a significant potential for Namibians to be involved in traveling locally. However, the number of domestic tourists can be increased by capitalizing on the marketing strategies available to tourism and hospitality operators. Based on the outcomes of the study, the results show that there are seasons for domestic tourism especially the Easter, Christmas and School holidays. The study has revealed the need for tourism operators to accommodate domestic tourists and appeal to them using certain marketing strategies. The tools that can be used to appeal to local tourists could include the use of advertising, direct sales, the print and electronic media as well as the Internet. Promotion could include the use of group discounts, special packages, incentives and competition involving domestic tourists. It emerged from the study that tourism and hospitality operators need to fully utilize publicity to effectively position their offerings to domestic tourists.

Table: 5 Most commonly used methods to promote domestic tourism

Information source		Namibia's rating of tools % Ratings			
		1	2	3	4
1	Advertising	26.6	30	40	16.6
2	Promotion	26.6	23.3	23.3	6.6
3	Publicity	30	36.6	23.3	10
4	Pricing	13.3	36.6	20	40
5	Product	26.6	26.6	20	20
6	Other	23.3	30	23.3	16.6

Table: 6 Current strategies being used to market domestic tourism in Namibia

	Current strategies used to promote domestic tourism	% Responses			
		1	2	3	4
1	Promotion of domestic tourism	14.3	34.7	21	30
2	Promotion of product specific experiences to Namibians	29.6	26.3	25.3	4.6
3	Development of product specific packages for domestic tourism	33	34.6	25.3	10
4	Distribution of information in specific places	30.6	22.6	16	24
5	Increase of marketing and distribution channels	23.3	32	21.3	10.6
6	Encouragement of repeat visit	32.6	30	40	16.6

Table:7 Future growth domestic tourism strategies in Namibia

	Market segmentation growth strategies for domestic tourism	% Responses			
		1	2	3	4
1	Increasing value for money on product offer.	-	30	13	26.6
2	Matching product and services to consumers. i.e. longer stays, experience and activities etc	6.6	23.3	56.6	13.3
3	Providing group travel, affordable and travel voucher options	16.6	26.6	43.3	13.3
4	Encouraging more travel to group domestic tourists through the use of special rates on low peak seasons	3.3	26.6	36.6	33.3
5	Promoting inter-provincial travel by encouraging touring and publicizing hidden secrets in different regions and experiences.	3.3	23.3	46.6	26.6
6	Making use of special events to target domestic tourists to reduce seasonality and provide customized services	3.3	30	33.3	33.3

Publicity can be achieved through the use of periodicals, news letters, special events and Public Relations exercise. While pricing structures are in place for domestic tourists, the study concluded that there is need for operators to lower their prices for the locals especially during off seasons and give special prices to different categories of the local market. The study revealed that operators need to develop and customize the tourism and hospitality products to suit the local market. This can be achieved by extending the product range and improving their availability and accessibility. Other strategies include the use of word of mouth making the locals ambassadors of the tourism industry. Even though the NTB has taken measures in marketing domestic tourism; the study revealed that there is need for a collaborative approach to domestic tourism marketing.

6. RECOMMENDATIONS

Based on the outcomes of the study, the following recommendations have been made. While there is a wide agreement on the role of domestic tourism in Namibia, there is need to employ aggressive marketing strategies regarding domestic tourism. The recommendations are made as follows:

- Develop a collaborative approach to domestic tourism marketing

There is need for a collaborative and participatory approach to domestic tourism marketing. Tourism and Hospitality operators need to come together and formulate marketing strategies that can appeal to the local populace. The marketing strategies can only be achieved if the operators develop customized products that can appeal to Namibians.

- Focus on domestic tourists during off seasons

There is need to target domestic tourists during the low seasons. While respondents indicated that the strategies being employed by NTB are not holistic, there is need to increase marketing and the distribution channels for domestic tourism. The service provided by the accommodation sector in the accommodation sector should encourage repeat visit there by making the locals ambassadors of tourism.

- Provide value for money for the domestic tourists

The study has revealed an immediate need for increasing value for money for the domestic tourists by matching the products and services offered to domestic tourists so that they may stay longer in these facilities.

- Increase accessibility to attractions for domestic tourists

From the observations made it can be concluded that in order to encourage accessibility, the tourism operators need to provide group travel, making travel affordable through the use of a voucher option system. The operators could promote inter-provincial travel by encouraging touring and publicizing the hidden secrets of the different attractions in different regions and the experiences there of.

- Educate the tourism operator on the value/role of domestic tourism

The study revealed the need to educate and re-orient the tourism operators on the value of domestic tourism in tourism and economic development of a place and the need to involve the local. As locals become more aware of the potential benefits of tourism, a positive response would result, thereby culminating into a boom in tourism within the local area.

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