

Wildlife tourism: creating memorable and differentiated experiences

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The purpose of the study reported here was to investigate whether wildlife viewing at privately-owned game reserves in South Africa creates memorable and differentiated experiences capable of extending the lifecycle of the wildlife industry. Various qualitative methods were used; 68 visitors who spent a total of 267 bed nights at various lodges adjacent to the Kruger National Park were interviewed, along with 50 influencers and role-players. Upon departure visitors were ecstatic, as the experience had been unique. They had lived in a fantasy world of the past and shared the animals' environment for a while. The visit had satisfied their spirit of adventure, as well as their long-term fascination with seeing animals in a genuine wilderness.

Wildlewetoerisme: skep van onderskeibare ervarings wat onthou sal word

Die studie probeer vasstel of wilddbesigtiging in wildreservate ervarings bied wat besoekers sal onthou omdat dit anderssoortig is en die lewensiklus van die wilddbedryf in Suid-Afrika sal verleng. 'n Verskeidenheid kwalitatiewe metodes is gebruik; onderhoude is gevoer met 68 besoekers wat 267 nagte by verskillende wildoorde aangrensend aan die Kruger Nasionale Park oornag het, asook met 50 beïnvloeders en rolspelers. By hul vertrek was die besoekers uitgelate, en die ervaring was vir hulle buitengewoon. Hulle het 'n fantasiewêreld uit vergange se dae beleef en vir 'n wyle die diere se wêreld gedeel. Die besoek het aan 'n behoefte na avontuur voldoen en 'n diepgewortelde begeerte om diere in 'n egte wildernis te sien.

The benefits inherent in the consumption of tourism services are primarily experiential (Leisen 2001: 49). The tourist is a seeker after experiences and is dependent upon external stimuli for them (Ryan 2002a: 26). If experience is the objective of a holiday, then enriched perception of objects and events, increased intensity of emotions and increased sensitivity of feelings or absorbing experiences are sought — a lessening of the focus on the self and a decreased awareness of the passage of time. Ryan (2002b: 55) refers to times of strong, positive emotional intensity as peak experiences. Experiences are inherently personal, existing only in the mind of the individual who is engaged on an emotional, physical, intellectual or even a spiritual level; no two people can have the same experience (Pine & Gilmore 1998: 99). However, not any experience will do (Heath 2001: 547-48). Travellers seek interactive, highly involved, quality experiences, focusing on in-depth coverage of the special interest topic or destination. This creates opportunities for info-tainment and edu-tainment (Heath 2001: 548).

1. Problem statement

Voase (1995: 54-63) argues that although holidays are a suitable object on which to spend discretionary income in order to satisfy the urge to travel and explore, as well as to respond to fashion and peer pressure, unabated growth in tourism cannot be projected. The growth in international tourism arrivals has slowed down since 2000 (Page & Connell 2006: 51), averaging only 2.4% per annum for the two consecutive four-year periods before and after 2002. It has also declined as a percentage of international tourists over the last four years: from 33% in February 2002 to 25% in 2006. Furthermore, this segment of the market comes from rich countries: Britain, Germany, the USA and the Netherlands. Botha (2006: 10) is thus of the opinion that South African tourism is in trouble. Wildlife and scenic attractions are no longer the prime reason for visiting South Africa, as they were in the 1990s (Bendixen *et al* 1996: 74). Mpumalanga (the area of investigation) dropped from the third to fourth on the list of most visited provinces in 2003 (SA Tourism 2004: 4). Only 2 702 686 bed nights in Mpumalanga were sold to all international visitors other than those from neighbouring African countries, in comparison to 5 151 569 in KwaZulu-Natal, the third most popular province, during 2002 (Visser 2004: 21).

Human needs can be satisfied in various ways and fashion can change. There is no absolute need to travel; satisfaction is in the mind. If the wildlife industry wants to sustain the growth in wildlife tourism it needs to create memorable, peak experiences that will lure people away from their homes. The attraction must be of more than local significance (Hudson 2003: 288, Kotze *et al* 2004: 121). Once consumers decide to travel, they expect to be engaged in experiences they find enjoyable. Page & Connell (2006: 485) note that the tourist experience remains one of the least understood fields in tourism research; indeed, because of its complexity, it is often omitted from visitor survey research in favour of more easily identifiable issues.

Tourism products and tourist experiences depend on the quality of destination environments and scenic resources. Today more tourists desire a participatory experience in a distinctive and often remote natural environment. Observation of wildlife in natural settings adds to the outdoor experience (Newsome *et al* 2005: 21; Reynolds & Braithwaite 2001: 258). It is therefore necessary to ascertain if the game reserve environment facilitates these emotive experiences.

2. Purpose of the study

The purpose of this study was to investigate whether wildlife viewing on privately-owned game farms and reserves in South Africa creates memorable and differentiated experiences capable of extending the life-cycle of the wildlife industry — an industry which entered a growth phase in 1988 and is probably in a maturity stage at present. The product life-cycle describes the evolution of a product as it passes through the stages of introduction, growth, maturity and decline. It is used to characterise the challenges of each stage and as a guide for strategic decision-making and a forecasting tool. The implications of a decline are more severe for a destination than for manufactured products, as the former represents an investment in a community (Newsome *et al* 2005: 129).

3. Research design and methodology

The study was exploratory and qualitative, inherently involving multiple methods. It may be classified as a case study with identifiable boundaries. Data not applicable to the case were not utilised unless they

reflected on the nature of the case (Henning *et al* 2004: 40-2). Various data collection methods were used to complement and verify each other (Fontana & Frey 2003: 99). An initial literature survey was conducted to understand the motivation of wildlife tourists and to describe the lifecycle or history of the wildlife industry in South Africa. Thereafter, mini-group discussions and in-depth interviews were held in order to gain insight from listening to people sharing rich, relevant information (Malhotra 2007: 145-58). A discussion guide was used. The universe comprised adults (16 years and older) who stayed at least one full day and night at a game lodge on a privately-owned game reserve in the region known as the Valley of the Olifants or Big Five Country.¹ Because the area adjacent to the Kruger National Park in the provinces of Mpumalanga and Limpopo contains the largest wilderness areas in the country and has offered authentic wilderness experiences for many years, it was selected as the most appropriate region for the study. The sample was judgmental and resembled snowball sampling to the point of theoretical saturation; in other words, gradual selection until all its questions could be answered (Flick 2006: 127-33).

The final sample consisted of 68 visitors who spent a total of 267 bed nights at 18 game lodges on privately-owned game reserves in the area. It included males (35) and females (33) from different age groups, as well as domestic (19) and international tourists (49) from different language groups. Interviews were held at different lodges on the game reserves and at a regional airport, so as to secure a diversity of respondents. The researcher was also a participant observer and booked in as a visitor at many of the game lodges during the research period (August 2001). This allowed for probing of exactly what is significant to visitors.

To secure information adequacy and an in-depth understanding of the situation rather than merely of specific variables, the information obtained from the visitors was triangulated by reviewing a variety of documents and interviewing 50 influencers and role-players in the tourist experience such as field guides, game rangers, tourist guides, a travel agent, game lodge employees and experts in the field such as safari operators, executives in tourist agencies, managers and owners of game reserves. The purpose of interviewing these respondents was not

1 "Big Five" denotes elephant, lion, leopard, buffalo and rhinoceros — the five most dangerous animals to hunt on foot because they are aggressive when wounded.

to select a representative sample, but to use sampling to produce data that would render cross-contextual comparison possible (Mason 2002: 121-25). Henning *et al* (2004: 101-40) explain the outcome of qualitative research as “composing a verbal landscape, or painting a word portrait”. The word qualitative implies an emphasis on the quality of entities and meanings that are not measured in terms of quantities, amounts or frequencies (Denzin & Lincoln 2003: 13, Henning *et al* 2004: 127).

4. The motivation of wildlife tourists

Even though there is a need for a better understanding of the motivation, aspirations, profile and behaviour of rural tourists (Hall 2000: 298), only a limited number of publications based on recent research specifically relevant to wildlife tourism could be traced. People go on holiday to experience a change in their lifestyle. Their desire for travel is related to their immediate ordinary environment, and the appeal of the beyond — the touristic non-ordinary (Ryan 2002b: 31). The question arises: does a visit to a game reserve provide the tourist with a transformation of or disentanglement from the ordinary, a temporary transcendence into a life of the non-ordinary? Do the incidental interactions between human beings and wildlife create memorable, differentiated experiences? Valentine (1992: 119) is of the opinion that they generate intense excitement and that their high quality generates a consumer surplus. This is confirmed by Barnes *et al* (1999: 107). A wildlife tourist's experience is enhanced if it includes a close encounter, or takes place completely alone in the wild (Shackley 1996: 63). This gives a sense of discovery. The rarer and more threatened the species, the more prepared tourists are to pay for such unscripted, non-orchestrated interactions. Wildlife tourism is essentially an emotive phenomenon that appeals to citizens of the developed world (Newsome *et al* 2005). Since the 1980s there has been a growing interest in the natural world. The literature reveals that nature has the following effects on human beings: restoration, competence building, symbolic meaning, and stimulation or curiosity (Newsome *et al* 2005: 85). The majority of Westerners like the idea of sharing their planet with a diverse range of wildlife (Shackley 1996: 9). For most tourists, an interest in wildlife originates in the outstanding photography and high quality commentaries of wildlife films (Shackley 1996: 1, 18). Exclusivity in an experience contributes to the prestige

for which tourists are prepared to pay a premium (Pine & Gilmore 1998: 98). A high-quality wilderness experience can only really be enjoyed either in the absence of other people, or where other tourists are similarly motivated, and engaged in similar pursuits.

Reynolds & Braithwaite (2001: 267-8) suggest that six factors are intrinsic to the wildlife tourism experience, capturing the essence of the quality and richness of the encounter for the tourist concerned. The first four relate to all tourism experiences and the final two are specific to wildlife tourism:

- authenticity — used to estimate the honesty, or natural behaviour of the attraction;
- intensity — the excitement (enthrallment or adrenalin rush) generated by the experience;
- uniqueness — in the sense that the experience is special or unusual and the participant feels privileged;
- duration — the length of the exposure to the stimuli (heightening up to a point, beyond which the visitor is saturated with the experience);
- species popularity — driven by a range of factors such as physical attractiveness, size, danger and the drama associated with the species, as well as the publicity that it enjoys in the media, and
- species status — rarity value.

The amount of control the tourist has over the experience, and the habitat, will also impact on the satisfaction.

Trekking is akin to wildlife tourism in that it is a component of the nature, eco- and adventure tourist (NEAT) market (Buckley 2000: 440). The multivariate intrinsic motivations of the trekking market may be classified as follows (Holden & Sparrowhawk 2002: 438-44):

- Needs associated with relaxation: to relax mentally, enjoy nature, relax physically, be in a calm atmosphere, and change one's daily routine.
- Thrills and excitement: to feel excited, stimulated, a sense of "freedom", and expose oneself to risky situations.
- Social interaction: to develop close relationships, spend time with loved ones, meet a new boyfriend/girlfriend, have a good time with friends, and make new friends.

- Self esteem and development: to be in a competitive atmosphere, challenge one's abilities, impress friends at home by saying one is "going trekking in Nepal", get fit, and feel a sense of control over the natural environment.
- Fulfilment: to increase one's knowledge of the natural environment, feel a sense of solitude, and feel close to nature.

5. The lifecycle of wildlife tourism in South Africa

Wildlife tourism is part of the emergent NEAT product sector (Buckley 2000: 438-9), which involves people visiting areas in order to see and gain an understanding of a wide variety of species in a manner that is environmentally responsible (MacLellan 1999: 376, Newsome *et al* 2005: 19). Reynolds & Braithwaite (2001: 260) add rural tourism and human relations with animals to this product sector. Despite the great variety in the structure of wildlife holidays, they all tend to adhere to the same basic format: almost the entire holiday being spent in some form of wildlife study with a camera or a pair of binoculars (MacLellan 1999: 382). Game lodges and reserves provide wildlife tourism and hospitality services, and operate predominantly in the short holiday market, all of which are growing sectors within the tourism industry.

Urbanisation and environmental consciousness have not only resulted in a growing concern about the negative impacts of tourism, but also heightened people's desire to experience nature (Diamantis 1998: 515, Reynolds & Braithwaite 2001: 259). The conservation awareness of the South African public has led to the preservation of wilderness areas. The orientation has changed from conquering the wilderness to conserving it and, ultimately, to protecting it. The lifecycle of wildlife tourism in South Africa started at the dawn of the final era: that of protecting the wilderness. The introductory stage lasted from 1960 to 1988 and was followed by the growth stage (Bresler 2002: 44-67). Game numbers increased steeply from 1988 onwards and a natural split between consumptive (game ranching) and non-consumptive (wildlife tourism) utilisation of game followed; eventually two separate sectors evolved. This trend may not continue since the price of some game animals at live game auctions is decreasing and some game ranchers may have to find different uses for game in order to increase profits and stay in business (Hoffman *et al* 2003: 126). In addition, the time

pressures experienced by “time-poor money-rich” tourists may impact negatively on leisure activities. The pressures on job security in the industrialised world are increasing to such an extent that employees are voluntarily working longer hours and foregoing some of their paid leave entitlement (Heath 2002: 548).

Although nature conservation has been viewed as having the potential to create employment in areas suffering from rural depopulation and unemployment, where it is extremely difficult to attract conventional industry and commerce, its real potential lies in the specialised wildlife holidays it can offer. South Africa and Scotland have had similar experiences. For example, wildlife and environmental tourism with a high input by knowledgeable guides have greatly enhanced the economic development of remote and undiversified areas in the north-eastern part of Scotland, in comparison to using estates exclusively for sporting purposes (MacLellan 1999: 379-81).

6. Findings

Once the data had been collected, recorded, sorted, organised and edited, the findings were constructed from the analysis of observation data, audiotapes and videotapes, content analysis of written documents, and transcripts of interviews. Visitors were attracted to game reserves to have a completely different experience, to “go on safari”, to “broaden their horizons and expand their knowledge”, yet it was the intensity of the experience that rendered it memorable and made it an interesting conversation piece. The intensity of the excitement may be attributed to visitors’ ignorance of what to expect. They knew it would be close to nature, that they would be driving in an open vehicle, and that it would be better than seeing animals on a video and nothing like seeing them in a zoo. But they never expected that the intimacy of close encounters, making eye contact with wild animals, would be so exhilarating. Respondents were on an absolute high after the visit and found the number of sightings unbelievable. They did not know one had to go and find the animals. Guests made comments in the visitors’ books such as: “stunning”, “unforgettable”, “really wild”, “exceptional experience in every way”, “awesome”, “very different”, “fantastic”, “spectacular”, “we loved it”, “very experienced rangers”, “we will be back”,

“marvellous”, “appreciated little touches”, “must return”, “very, very good”, “breathtaking pictures and beautiful scenery”, “why can’t we live here?”, “do we have to go back?”, “a little bit of heaven”, “wonderful evening walking in the jungle with animals”.

Respondents found it difficult to single out the most outstanding experience and came up with expressions like: “The biggest advantage was to be inside their world for a few days.” “It was just so different.” “To live amongst the animals was the best.” “It was amazing how swiftly animals appear and disappear and how camouflaged they are.” “I liked the intimacy of sharing experiences.” “The light, the sound, the excitement; it was the total experience.” “The sunset, the sunrise, the stars; everything was great.” “The tents; you hear everything; and the footprints at your doorstep.” “Just lying in your tent listening was great.” “The tranquillity and solitude was amazing.” “The lions roar[ing] in the evening was the best.” “It was a wonderful surprise that you came so close to the animals.” “The whole experience was amazing.” “Losing track of time, the little lamps; it was so lovely.” The “Big Five” were a major attraction and the respondents would recommend a visit to their friends. However, the majority of overseas visitors would probably not return in the near future. To have a genuine, authentic nature experience and to live, as it were, in a fantasy world for a few days is something many visitors had always wanted to do: to see Africa as they imagined it once was, even if they knew it was not like that any more. Such experiences can be classified as “existential authentic” states of being, as the visitors found themselves more authentic because they had engaged in non-ordinary activities characterised as nostalgic or romantic (Wang 1999: 355-58). All six of the attributes suggested by Reynolds & Braithwaite (2001: 267-8) were confirmed.

In some cases concern was expressed about the sustainability of a unique, authentic experience. Trackers commented:

Some of the game lodges became like cities, with five-star hotels taking over from the bush people. In the wild things are supposed to be natural and the environment and animals should come first, but greed has made things in the bush more unnatural.

The magic of an evening was spoilt for another respondent by the noise of the bar fridge and the air conditioning in the room. One game ranger described his job as now all about image and money:

A ranger is expected to be young, single and have a macho Camel man image with a lion nail hanging from a chain around his neck.

Visitors were amazed at how knowledgeable, professional, and passionate about their work the game rangers and field guides were; they were with the guests all day providing interpretative commentary and the ultimate wildlife experience. The majority of overseas visitors required trackers to spot the animals and the field guides/game rangers to interpret the veld for them — to tell them what they were seeing. For them, the educational aspect was outstanding. It rendered the experience more entertaining and exiting. Guests were made to understand how lucky they were to see anything. Trackers made guests grasp how well the animals are camouflaged and appreciate small things. In addition, they were patient, helpful and sensitive to individual needs. Management strategies to for physical and intellectual control of the quality of the experience enhanced the satisfaction of the encounter, as suggested by Reynolds & Braithwaite (2001: 268-70). Physical control of the experience relates to the closeness of the encounter, regulated by a guide to prevent risk or injury to the visitor. Intellectual control relates to the amount of expert knowledge transmitted by the guide in a quiet confiding voice, or other on-site interpretation aids, which increase the sense of intimacy, making the particular experience seem special and the observer feel fortunate.

Respondents also found the facilities and food better than expected. The facilities and the décor were designed to be showpieces not only of African crafts, but also of African art. This reflected and enhanced the wildlife experience and blended in with the environment, creating a distinguishable, undeniably African atmosphere. Many visitors found the open showers “superbly magnificent” and were sure one would not find anything similar anywhere else in the world. They liked the sense of danger inherent in the awareness that there were no camp fences.

Visitors were surprised at how wonderfully fresh the food was and how tastily it was cooked. However, some said that the braai experience was no different from a barbecue anywhere else in the world and that the food was the same as in the Southern part of America. Italian and French guests were disappointed to have travelled past orchards on the way but to find no fruit on the table. Other negative experiences were caused by some visitors. Tour operators, guides and rangers, as well as

guests, testified that some guests, albeit a minority, can irritate others by being unrefined, intolerant or smug, or by not showing any interest in the environment or wildlife. Incentive and sport support groups are generally more unruly and noisy than smaller fly-in-and-transfer groups (FIT) because everybody in a group may not share the same interest in wildlife. This also applies to coach tour groups.

Those who had travelled in game reserves in Zimbabwe, Kenya and Botswana found the South African experience superior — “a more civilised Western experience” — but the general perception of safety in South Africa was very negative. Foreign visitors were in constant fear when travelling in South Africa, but they felt safe in the bush. Malaria was also perceived to be a problem.

7. Interpretation

It is not surprising that the experience of visitors to the game reserves under consideration in this study confirms the attributes that capture the essence of the richness and intensity of wildlife tourism (Reynolds & Braithwaite 2001: 267-8). These are authenticity, intensity, uniqueness, short duration, and popular species with publicity status.

There is a close similarity to the expectations of trekkers in Nepal for a truly satisfying wildlife experience (Holden & Sparrowhawk 2002: 438-44). The trekkers viewed the experience in nature as a key aspect of their need fulfilment (95%) and were motivated by the desire for escape from the home environment via a physical relocation (over 80%). They reported a close relationship between the need to enjoy nature, calmness and mental relaxation. The majority were looking for freedom (70%), stimulation (70%), and excitement (55%). They wanted to feel close to nature (87%), increase their knowledge of the natural environment (61%) and feel a sense of solitude (40%).

In addition, the findings also reveal that wildlife tourists in South Africa resemble ecotourists in the United Kingdom: they are a highly involved group of tourists who see their holidays as an important source of pleasure, rather than risk-related (Diamantis 1998: 516). They tend to select this type of holiday as a way to increase their knowledge by experiencing new, different lifestyles and exploring an undisturbed area with the purpose of being educated. The experience magnified the values

of excitement and a sense of accomplishment. The findings also confirm the view held by Sharpley (2002: 310) that tourists' needs are primarily personal; they want to escape into a dreamlike existence and do not want to be burdened with the concerns of the normal world.

This research is of value because the findings show that the sustainability of the product's life cycle is not dependent on continuous innovation of the product; it satisfies a deeply felt need that is not constantly changing. It is more dependent on successful management of the observation encounter by means of physical and intellectual control, and on continual attraction of new customers, thus on word-of-mouth and promotion.

To summarise, a visit to a game reserve offers guests the opportunity to live in a fantasy world for a few days. The resource base is also found to be more or less in its original state; the environment and landscape has not been spoilt. Game lodges on privately owned game reserves in the area to the west of the KNP can thus be described as a significant resource based attraction, to which people are prepared to travel great distances (Hudson 2003: 290). As long as a genuine, authentic nature experience in an undisturbed environment is guaranteed, the wildlife industry in South Africa will prosper and grow. However, if it becomes exploited and the observation encounter not managed appropriately, it will struggle to maintain its viability and decline in relative importance as a tourist attraction (Hudson 2003: 291).

8. Limitations of the study

This was a qualitative study, and such studies cannot be neutral, objective or total (Mason 2002: 8). Objectivity (understood as a distanced detachment and neutrality intended to guard against bias and thereby ensure the attainment of truth) is not possible. Qualitative research is always biased, because interpretation produces understandings which are shaped by class, gender, race, and ethnicity; culture-objective interpretations are impossible. Writers create their own versions of the realities they describe, and seek verisimilitude — a validity that evokes in readers a feeling that the experience described is lifelike, believable and possible (Flick 2006: 367-82). To summarise, there can be no separation of the investigator from the investigated. It is the detailed description of the research method that ensures external validity so that

anyone interested in transferability will have a solid framework for comparison (cf Mason 2002: 187-200). The onus to demonstrate the applicability of a set of findings to a different context is more on the researcher who attempts to make the transfer than on the original researcher.

9. Marketing management implications

The unique selling point of wildlife holidays in South Africa is that they are completely different from the average holiday in a rugged way, but at the same time more European than holidays in the rest of Africa. Managers of game lodges need to use this information in designing their products, training their personnel, controlling quality and developing promotion material to take advantage of product differentiation. According to Briedenhann & Wickens (2004: 193) small rural tourism operators struggle to identify specific target groups and special interest niches, as well as appropriate promotion material. The solution to sustainability lies in selective development, careful conservation and sensitive design (Hudson 2003: 291). This requires the exercise of sophisticated management techniques to simultaneously protect the resource and enhance the visitor's experience, to promote the site and to generate revenue for it in a competitive market, taking into special consideration that operators are small and have limited marketing budgets (Middleton & Clarke 2002: 350).

The visitor's experience can be enhanced in four areas; the physical control of the encounter, co-production by the guide and the observer, the species and the habitat (Reynolds & Braithwaite 2001: 265-66, 269-70). With respect to control of the encounter, the number of visitors and the interaction itself must be managed. As regards co-production, the factors that play a role are the educational level of the observers, any communication with previous visitors, the level of knowledge of the guide, the communication skills of the guide, the rapport between the personal guide and the observer, the motivation levels of the guide and the observer, and any on-site interpretation aids. The species may also ensure satisfactory wildlife experiences if it displays most of the following characteristics: predictability in activity or location, approachability, ready viewability, tolerance of human intrusion, and elements of rarity or local superabundance. Motion, size and the presence of an infant ("cuteness") have the power to hold vi-

sitors' attention. The habitat is desirable if it supports a number of interesting, viewable species, enables good visibility, has features that concentrate animal activity (such as waterholes) and allows for protection and mobility (transport).

It is suggested that the holiday experience and memories be extended by more personal involvement with guests subsequent to the visit. For example, a creative, fun competition on animal behaviour, a crossword puzzle or a quiz (on mammals, for example), with a prize to be won, could be electronically mailed to visitors. Photographs of newly born animals could also be e-mailed to winter guests in summer, to create a desire to pay the game lodge a visit in another season. The industry must also take appropriate steps to stimulate the interest of children in wildlife because they are the market of the future. The attraction of the bush as an ideal holiday is an acquired taste and an interest shared among friends. It needs to be nurtured to ensure sustainability. The feasibility of sponsoring national or regional school projects focusing on wildlife (in art, photography and essay-writing, or something similar) should be explored.

Game lodge owners should encourage their field guides to qualify as cultural guides for the region, since additional knowledge of the history of the people will render the experience more interesting and memorable. The relative safety of the area may be emphasised in promotional material. Testimonials from guests would provide ideal, convincing evidence.

The wildlife experience is becoming less and less natural, which may not be in concert with the trend in consumer values that stresses authenticity. Actual changes in consumer values and behaviour need to be monitored by means of ongoing marketing research in order to ensure that product offerings respond appropriately.

10. Suggestions for future research

This study can serve as a springboard for several future research directions. For example, visitors to game lodges could be profiled, as there might be a difference between domestic and overseas visitors in terms of awareness, image, the benefits sought or the propensity to return. Game lodge products could also be categorised, based upon an inves-

tigation of how the decision was made to visit the attraction, in order to facilitate promotion. A space-perceptual map of how visitors and prospective visitors perceive the similarities and differences between various wildlife viewing opportunities could help lodges to position their products. For example, in what way does whale watching differ from looking for the Big Five? There might also be a difference between visitors who book into a game lodge and those who organise their own wilderness safari. Do visits to view wildlife in Botswana, Namibia or Kenya offer different experiences? What benefits do such destinations, with their wildlife attractions, offer? Does the way in which one travels and the choice of accommodation render the experience so different that it caters for different market segments? A means-end study could differentiate between various wildlife and NEAT product attributes, as well as the benefits sought by visitors, for segmentation purposes. One might also explore how lifestyle (activities, interests and opinions, where relevant to holidays) influences the type of attractions visitors tend to select.

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