

**THE IMAGE OF SOUTH AFRICA AMONG VISITING CHINESE
TOURISTS: IMPLICATIONS FOR DESTINATION
POSITIONING AND MARKETING STRATEGY**

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A research report submitted in partial fulfillment of the requirement for the degree of
Magister of Commerce (Management), University of the Western Cape

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KEYWORDS

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Emerging Market

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Image Selection



ABSTRACT

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Western Cape



The image of a destination is built by a variety of influences, only some of which can be directly or indirectly attributed to the actions of destination marketing companies. This study proposes to identify, analyze and evaluate the factors that could impact positively and/or negatively on the image of South Africa as a tourist destination among tourists from China. The existing image of the destination among Chinese tourists to South Africa must be considered when South African Tourism organizations position South Africa as a tourist destination when developing marketing strategies for this target market.

The study provides a brief examination of the South Africa tourism industry, with particular reference to the emergence of South Africa as a destination for tourists from China. The study seeks to identify current perceptions of South Africa's image in this market. It also seek to demonstrate that although there are image selection initiatives in positioning the destination, the industry needs to undertake further consumer studies to identify those images that are most likely to stimulate travel by Chinese tourists to South Africa in general, and the Western Cape in particular.

A literature review of recent publications and marketing information was conducted. Primary research comprised semi-structured interviews with representatives of local and provincial tourism authorities and marketing organizations, and private sector operators involved in serving the target market, as well as structured interviews with Chinese tourists currently visiting South Africa. This help the researcher to understand the needs, motivation and behavior of the tourist and assist the researcher in analyzing their perceived image of South Africa as a tourist destination.

November 2004

DECLARATION

I declare that *The Image of South Africa Among Visiting Chinese Tourists: Implications for Destination Positioning and Marketing Strategy* is my own work, that it has not been submitted before for any degree or examination in any other university, and that all sources I have used or quoted have been indicated and acknowledged as complete references.



BINGYAN YU

NOVEMBER 2004

Signed:

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SECTION ONE: INTRODUCTION

1.1 The Necessity of the Research

Positioning a destination's image in the mind of a target group of consumers is a core activity of destination marketing organizations. This study proposes to identify, analyze and evaluate factors that could impact positively and /or negatively on the image of South Africa (SA) as a tourist destination among tourists from China. The Western Cape is blessed with the natural resources and physical infrastructure to provide tourism products for domestic and international tourists. With an understanding of the destination image in the target market, the industry not only can highlight that South Africa is one of the best tourism destinations in the world, but also can concentrate on a specific approach in order to attract the Chinese market.



Although South Africa's tourism industry is influenced by the international situation, South African tourism enjoyed a bumper year in 2002 despite a global downturn in the industry. While tourism growth to South Africa slowed in 2003 and 2004, the Chinese market has become one of South Africa's fastest-growing tourist sources.

Bilateral relations between SA and the People's Republic of China (PRC) have expanded substantially since the establishment of diplomatic relations in 1998.

In an effort to promote tourism from China, the authorities in Beijing have extended Approved Destination Status (ADS) to South Africa. The terms of an ADS agreement have been concluded. This has resulted in a significant increase in the number of

tourists from China because they no longer require approval from the Chinese government to travel to South Africa.

In the absence of a coordinated approach to marketing South Africa in China, this study examines some of the issues more closely and draws some tentative conclusions about possible approaches that the SA tourism industry could adopt in terms of image selection in positioning the destination in the Chinese market.

1.2 Research Problems

There is apparently no effective coordination in the tourism industry of South Africa's marketing policy towards many overseas markets, including China.



According to Mkhondo (2002), Cheryl Carolus, the former CEO of South African Tourism, has identified three key principles that need to be implemented in the near future. They are:

- To effect integrated marketing and promotional campaigns to build a powerful “South Africa” brand in international markets.
- To highlight the location advantage that makes South Africa a natural hub for client flights from anywhere in the world.
- To promote the image of “land of smile” (people).

Based on these principles, in order to ensure that more tourists are attracted from China, the SA tourism industry needs to implement a policy, which should emphasize the “image” of the destination. This includes:

- Understanding the existing destination in the target markets
- Marketing the country as a tourism destination
- The relationship between image selection in destination positioning and its impact on the local tourism industry.

Developing and changing images of a place is a difficult process. Part of the process is to research what outsiders (i.e. Chinese tourists) identify as the true and strong elements of the place (South Africa). The central argument is that the approach of the South African (SA) tourism industry towards image selection in positioning the destination in the Chinese market should take into account the current perceptions of Chinese tourists to SA and their motivation to travel.

The purpose of the study is to identify the current perceptions of SA’s image in the Chinese market, which can be used to further develop the destination positioning of the industry. The following questions provide a starting point:

- What are the Chinese tourists’ perceptions of SA?
- What kind of image has attracted these people to visit SA and the necessity of image selection?
- What kind of marketing strategy (the approach) can be taken regarding on the above questions?

- How have existing marketing strategies influenced the decision of tourists to travel to South Africa? If so, where has this been most apparent?
- What destinations are perceived as direct competitors in the China market, how does this affect the strategy and how could these be countered in positioning SA as a destination?

1.3 Definitions of Terms

- **Destination marketing organizations (DMO)** are those governmental and non-governmental organizations that are responsible for marketing specific tourism destinations to the travel trade and individual travelers. These organizations range in size from the continental to the local: from multi-country regions (e.g. European Travel Commission) to individual communities (e.g. convention and visitors bureaus).
- **Chinese tourists** are tourists from China, who are temporary visitors staying at least 24 hours in the country visited for leisure (i.e. recreation, holiday, health, study, religion or sport), business, family, mission or meeting purposes.
- **Destination Positioning** is the responsibility of DMOs that market tourism destinations. The principal marketing role of DMOs has been seen in fairly narrow promotional terms of creating and communicating appealing of destination images and messages to prospective visitors, mainly through advertising, Public Relation and print, as a necessary basis for the product-specific marketing activities of operators (Image-creation).

- **Tourism Spending includes** key items of holiday expenditure (at least with international tourists), such as air-tickets or extended or ‘all-in’ tours—the benefits from this spending go primarily to big corporate and multi-national companies. Luxury tourism often requires specialized marketing, international communication and luxury goods, which cannot be sourced locally, so the bulk of tourist spending is not to the benefit of local communities or domestic companies (Pleumarom 1995, Ashley 2000, Naji 1998).
- **Outbound Tourism** involves people departing from one country to visit another country.
- **Tourism includes** all travel, for whatever purpose, that results in one or more nights being spend away from home (DEAT 1996;vi). Tourism can be thought of as a whole range of individuals, businesses, organizations and places which combine in some way to deliver a travel experience or the temporary movement to destinations outside the normal home and workplace, the activities undertaken during the stay and facilities created to cater for the needs of tourists (Cooper et al, 1993:4).
- **Tourist** is a person who travels away from home, staying away for at least one night. A tourist could be a domestic tourist, a regional tourist or an overseas tourist. A tourist travels for different purposes including business, leisure, conference and incentive (DEAT 1996: vi).
- **Demand-led Tourism Development** is tourism development, which is focused on the needs, expectations and wants of tourist rather than the suppliers of the tourism product or the supply of physical infrastructure.

- **Consumer Behavior** is the study of why people buy the products they do, and how they make decision.

1.4 The Importance of the Research

As one of the largest tourism growth markets China presents an enormous opportunity for the SA tourism sector if a sufficiently attractive destination image is developed. The study will help to identify the current perceptions of SA's image in this market, which can be used for further development of the destination positioning of the industry.

The study seeks to highlights the relationship between destination image and the Chinese consumers' motivation to travel to South Africa. Only after the purposes of the tourists have been analyzed, can a tourism marketing strategy be developed. So organizations involved in the industry, like operators, investors and decision makers in DMOs could use the findings to ensure the adoption of an appropriate and effective approach to market the destination to China.

By identifying the image preferences of Chinese tourists while visiting SA, the study will assist the industry to develop a series of guidelines designed to improve the marketing strategy within the existing network. Beneficiaries will include hoteliers, wholesalers and travel agents.

1.5 Content of the Research Report

The report is divided into the following sections. Sections one and two: highlight the necessity of the research with brief background of the industry, which focuses on the Chinese market. In Section three, the literature review discusses travel motivation issues and image selection in destination positioning. The topic discussed includes push and pull factors in travel motivation, and a framework for understanding destination image. Section four explains the research methods, in which several interviews were undertaken and a questionnaire were used in order to facilitate information collection. Data analysis, discussion of the findings, and interpretation of results are to be found in Section five.



Section six, the conclusion, includes recommendations for the marketing strategy of image selection of South Africa in destination positioning in China market, the limitation of the research and possibilities for further research.

SECTION TWO: BACKGROUND OF SOUTH AFRICAN TOURIST INDUSTRY

2.1 Global Tourism

Global tourism shrunk from over 714 million international tourist arrivals in 2002 to 694 million international tourist arrivals in 2003 (down 2.8%). The reasons cited by most commentators were war, terrorism, Severe Acute Respiratory Syndrome (SARS) and a soft global economy. While global tourism declined in 2003 it is worth noting that the external shocks to the industry was severe but the decline was only a marginal one. The global travel and tourism industry has proved yet again to be, in general, a robust sector (*South African Tourism Strategic Research Unit, 2004*).

2.2 South Africa in the Global Context

There were 6 504 890 tourist arrivals to South Africa in 2003. This is a 1.2% increase over 2002 (see Table 2.1). South Africa is one of the countries that grew arrivals 2003

Table 2.1 Tourists Arrivals to South Africa in 2003

<u>Total foreign tourists arrivals</u>	<u>6 504 890</u>	<u>+1.2%</u>
<u>Africa & ME</u>	<u>4 485 064</u>	<u>- 0.1%</u>
<u>Americas</u>	<u>262 496</u>	<u>+3.1%</u>
<u>Asia & Australia</u>	<u>265 628</u>	<u>+0.9%</u>
<u>Europe</u>	<u>1 319 172</u>	<u>+5.3%</u>

Source: 2003 Annual Tourism Report, South African Tourism Strategic Research Unit, 2004

despite the general decline in 2003 arrivals. South Africa also out performed most of its key competitors (in the long haul air markets) such as Australia and Thailand, which posted declines of over 5 and 6 percent respectively (*South African Tourism Strategic Research Unit, 2004*).

From a global perspective, there is expected to be dramatic increases in the tourism industry. According to an official forecast of the World Tourism Organization (WTO), by the year 2020, international tourism trips would treble to 1.6 billion with an estimated value of US \$ 2 trillion annually (Robinson, 1999).

For South Africa, the government has identified tourism as one of the main industries, which contributes to GDP growth. The national DMO, SA Tourism markets South Africa's scenic beauty, diverse wildlife, kaleidoscope of cultures and heritages, the great outdoors, sport and adventure opportunities, eco-tourism and conference facilities. Since 1994 South Africa has experienced continuous growth in total number of visitor arrivals; the number of international tourists is also growing.

2.3 Chinese Outbound Tourism Market

Until twenty years ago, China had very strict outbound policy. Tourism for pleasure was a foreign notion even to the handful of people who could have afforded it (Lui, 2000). After the relaxation of travel regulations in May 1991, China 's outbound tourism is boomed (Zhang and Lam, 1998). It had experienced a steady and

substantial growth from 2.8 million in 1992 to close to 10 million in 1999. (Lee & Yeung,1999). From 1994 to 2003, the China outbound market increased steadily at 13.9% per annual.

The latest Chinese outbound figures recorded up to 22 million in 2003. There were 11.2 million outbound tourists in the first five-month in 2004, which is 59% and 82% growth when compared to the same period in 2002 and 2003 (www. cnta.com).

By 2020, the number of Chinese outbound tourists has been estimated to reach the staggering 100 million (10 percent of its one billion population) with 15 percent annual average growth. Already ranked the fifth outbound market in the world. China is forecast by the World Tourism Organization to become the leading source market of Asia by 2005 and become the leading source market worldwide by 2020, dominating global tourism arrivals (SAT, 1 November 2001).

Currently Chinese tourists are restricted to visit government “ approved destinations” only. South Africa was granted Approved Destination Status (ADS) in December 2001. By the end of September 2004, 51 countries had been awarded ADS. They were Hong Kong, Macau, Thailand, Singapore, Malaysia, the Philippines, Australia, New Zealand, Korea, Japan, Vietnam, Cambodia, Myanmar, Brunei, Nepal, India, Indonesia, Pakistan, Sri Lanka, Turkey, Egypt, South Africa, Cuba, Croatia, Hungary, Germany, Greece, France, Holland, Belgium, Malta, Portugal, Spain, Italy, Austria, Finland, Sweden, Czech, Estonia, Latvia, Lithuania, Poland, Slovenia, Slovakia, Cyprus, Denmark, Iceland, Ireland, Norway, Romania, Switzerland.

Many competitors in the global market are hotly competing for China's fast-growing outbound market. Hence the first priority of most countries is to get onto the ADS list. It is reasonable to believe that the integration of China into the global economy by joining the World Trade Organization will further accelerate the liberalization of its outbound market policy. Under WTO obligations, China would free up the travel industry allowing more agents to sell travel under the ADS banner (Chan, 2002).

In addition, the yearly series of surveys done by Far Eastern Economic Review on the consumer behaviour in China discovered that wealthy Chinese people were traveling regularly for tourism as well as business, with men making more business trips and women making more holiday trips. Around one in ten people interviewed had made one overseas air trip and a slightly smaller proportion had made 2 or 3 trips (Vittachi, 2001). Hong Kong was a top spot for holidays of the upper middle class. It was followed by Thailand, Singapore, and Malaysia (Vittachi, 2001). This might be due to language similarities, close cultural, family links and proximity (Liu, 2000).

2.4 Relationship between South Africa and China

In the early 1990s, South Africa began establishing or reestablishing ties with many other countries. Among the many countries that favoured closer ties to South Africa in the mid-1990s were the Republic of China (ROC) or Taiwan and the People's Republic of China (PRC). South Africa and the ROC had maintained ties during the apartheid era, partly because both were virtual outcasts from the international community. The PRC was critical of apartheid but had been cool toward the

ANC (generally supporting the Pan African Congress). In 1990s, President Mandela expressed South Africa's desire to maintain longstanding ties with the ROC and to establish diplomatic relationships with PRC.

(<http://www.countrystudies.us/south-africa>)

Bilateral relations between SA and the People's Republic of China (PRC) have expanded substantially since the establishment of diplomatic relations in 1998.

In December 2001, during the official launch of the Chinese South Africa Binational Commission in Beijing, Chinese president Jiang Zemin announced that South Africa has been granted "Approved Destination Status" for Chinese tourists (Pienaar, 2001).

The ADS negotiation had lasted for two years and its greatest benefit was the ability to proactively advertise South African holidays, in hoping to attract more visitors to the country. This has resulted in a significant increase in the number of tourists from China because they no longer require approval from the Chinese government to travel to South Africa.

Furthermore in May 2003, South African Tourism's Manqoba Nyembezi was the first-ever tourism diplomat appointed at the South African Embassy in Beijing. This signals the ushering in of a new era of tourism marketing between South Africa and China.

The relations between the two countries have come firmly under the spotlight with a series government official visits between the two countries. The visit of Deputy

President Jacob Zuma to China in September 2004 also highlighted the business links between the two countries.

2.5 Current Chinese Tourism to South Africa

More than half of the Chinese visitors to SA are on business or official purposes. They are company paid or government paid "tourists" (SA Embassy in Beijing).

According to the ADS agreement with Chinese government, the SA Embassy can only issue group tourism visa. The ADS tourism market is growing rapidly, but since the Chinese cannot travel to SA individually and there is very little knowledge about SA (both public and trade), growing this market is quite challenging. The China market is also a price driven market. The Chinese local travel agents kill the price with all their effort in order to attract more citizens to travel to South Africa. That gives a negative effect on the quality of SA tourism experience.

It is quite easy for Chinese tourists to travel to SA. Both the Embassy in Beijing and the Consulate General in Shanghai can issue visa. There were significant increases in the number of Chinese tourists who visited South Africa in 2003 when compared with the figure in 2002 although market share only increased marginally (Table 2.2).

The recent crimes on Chinese in SA had a negative effect since many local media in China reported those cases. The very common question about SA is "Is it that safe to travel to SA?"

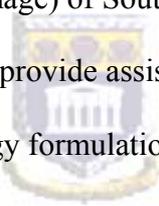
Table 2.2 No. Of Chinese citizens had been visited South Africa in 2002 and 2003.

Inbound Arrivals to South Africa - 2002	Inbound Arrivals to South Africa - 2003	Outbound Departures 2002	Outbound Departures 2003	South Africa's Market Share in 2002	South Africa's Market Share in 2003	Δ Change in Market Share	
24 247	30 753	12 986 000	16 034 000	0.19%	0.19%	2.7%	

[China excl. Hong Kong]

Source: 2003 Annual Tourism Report, South African Tourism Strategic Research Unit

This research aims to place emphases on the destination positioning, with focus on the image of South Africa among visiting Chinese tourist by taking into account of their travel motivation and perception (image) of South Africa. With a better understanding of this emerging market, this would provide assistance in determining the targeting market and related marketing strategy formulation.



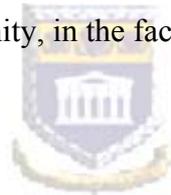
The following section discusses previous literature related to this research subject.

SECTION THREE: LITERATURE REVIEW

3.1 Introduction

As South Africa continues to be one of the hottest tourist destinations in 2002/3 and the Chinese outbound tourism market became acknowledged as a key emerging market in South Africa, the importance of marketing the industry image more effectively and more efficiently increased.

As China is the fastest growing outbound tourist countries all destinations need to put in more effort in order to improve the destination's image and to capture a significant share of this new business opportunity, in the face of intense international competition from other destinations.



This research focuses on the motivation, the image of South Africa among visiting Chinese Tourists, which should be considered by DMO when establish a strategic marketing plan. Tourists are individuals and groups with widely varying needs, tastes, perceptions, characteristics, behavior and economic means to travel (Go, 1989).

Consequently, this literature review covers travel motivation first, and then focuses on the theories of destination image in terms of developing marketing strategy. The research concentrates on the travel motivation and image of the destination among visiting tourists. To examine the issues, we apply Chon's (1989) push, or motivation factors and pull, or image factors and Beerli's model of relationship between motivation and perceived image.

3.2 Travel Motivation

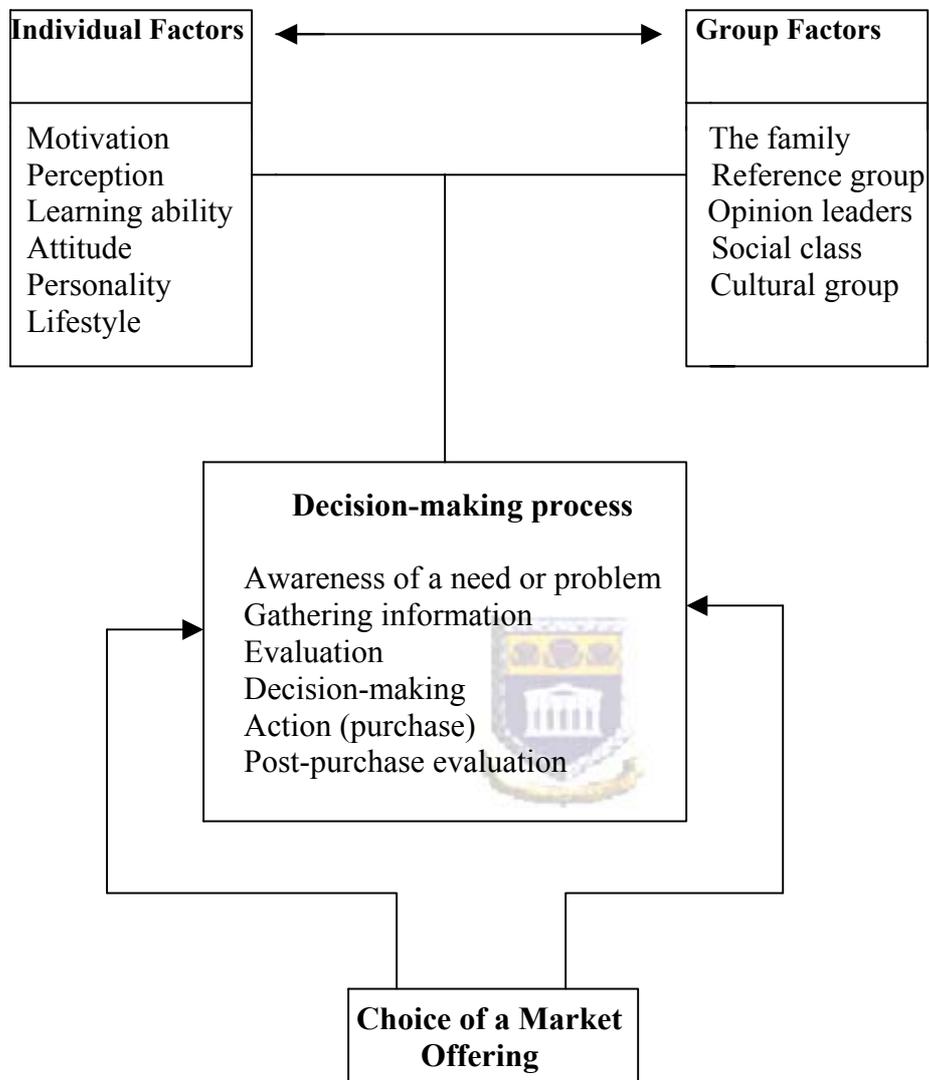
Tourists have needs that they believe travel can fulfill. Needs give rise to motivations, which are energizing forces directed at meeting those needs.

Motivation is concerned with initiating movement or inducing a person to act (Bennett, 2000:73). A person has many needs, some are bioorganic (such as hunger, thirst, and discomfort) and some are psychogenesis (such as recognition, esteem, or belonging). When it is aroused to a sufficient level of intensity, a need becomes a motive, which drives the person to act (Kotler, 2000).

There are several famous theories that attempt to explain motivation, such as Maslow's Hierarchy of Needs and Herzberg's Two-factor Theory. The former explains why people are driven by particular needs at particular times (Maslow, 1954). As consumers' needs influence motivation and its effects, it is necessary to identify consumer's needs. The latter distinguishes dissatisfies and satisfies in customers (Herzberg, 1968).

Consumer behavior can be represented as consisting of those actions of decision-making units (families, and as individuals) directly involved in obtaining and using need, satisfying products and services (see Figure 3.1). It includes the decision-making process that precedes and determines these acts. In the past it was assumed that a consumer's buying decisions were a result of income only. However, it has become clear that a host of other factors influence purchasing patterns and consumer decision-making (Bennett and Strydom, 2001).

Figure 3.1 Overview of Consumer Behaviour

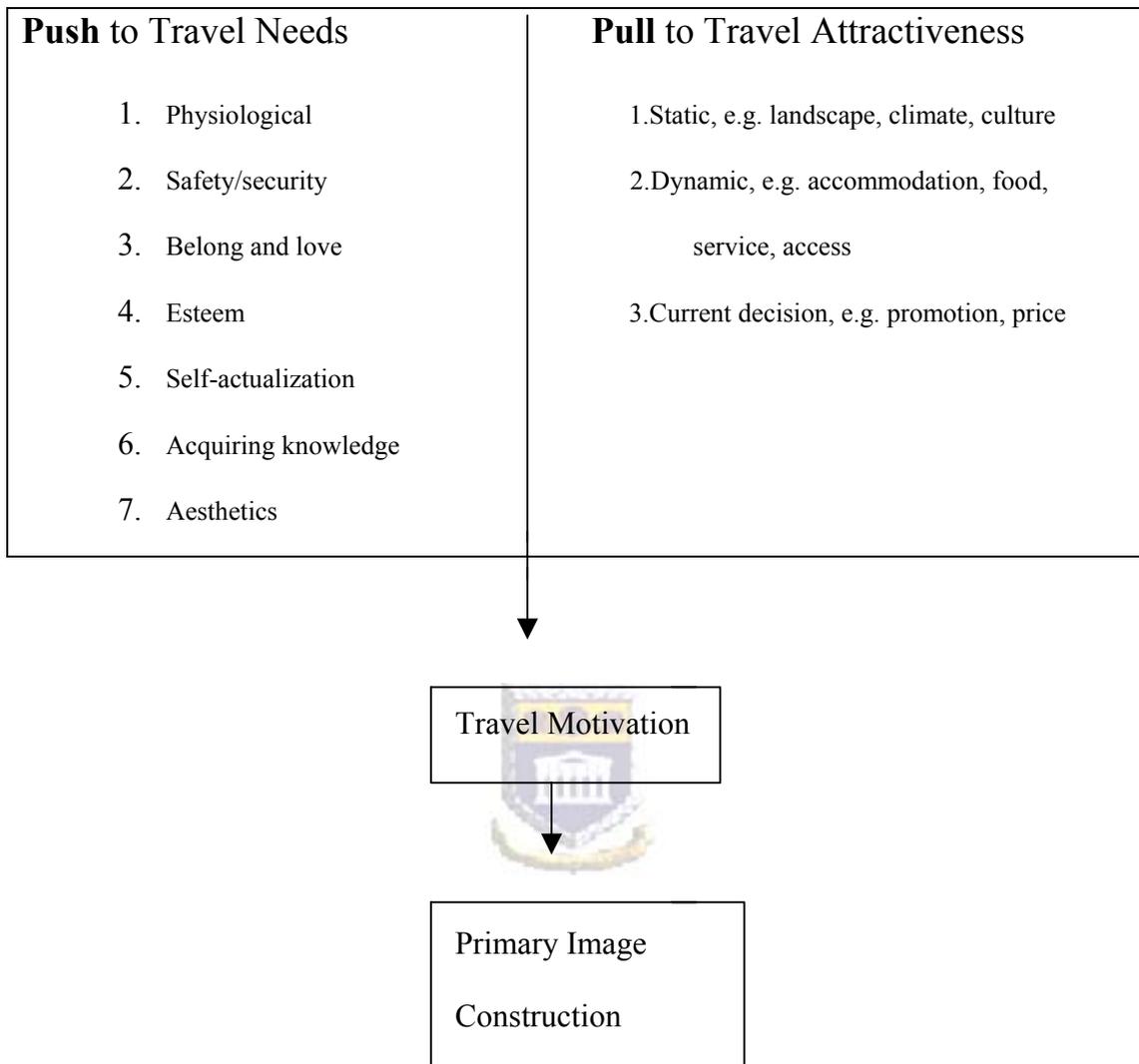


Source: Adapted from JA Bennett and JW Strydom, 2001: Overview of Consumer Behavior

3.3 Push and Pull Factors

Chon (1989) suggested that at the point when an individual is motivated to travel, a primary image of a destination has been constructed. It is based on certain “push” and “pull” factors associated with the destination (see Figure 3.2)

Figure 3.2 Travel Motivation



Source: Chon, 1989 cited in Lubbe, 1998

Chon (1989) proposed that potential tourists construct a primary image of a destination when that destination is being considered as a possible choice in the travel buying process. The motivation of the individual person to travel, to look outside for what he cannot find inside, is produced not so much by an innate impulse, but develops primarily under the influence of the social environment, from which every individual draws his norms (Krippendorf: 1987).

3.4 Models of Consumer Behavior in Tourism

Pizam and Mansfeld (2000) suggest that key elements of the tourism consumer behavior system include consumer beliefs and attitudes, situation factors, and purchasing behavior.

Wahab, Crampon, and Rothfield (1976) acknowledged that the holiday purchase is distinctive because there is (a) no tangible return on investment, (b) considerable expenditure in relation to earned income, (c) a purchase that is not spontaneous, and (d) an expenditure that involves saving and preplanning.



Schmoll's (1977) model of tourism consumer behaviour is composed of four fields:

Field 1. External stimuli such as trade publications

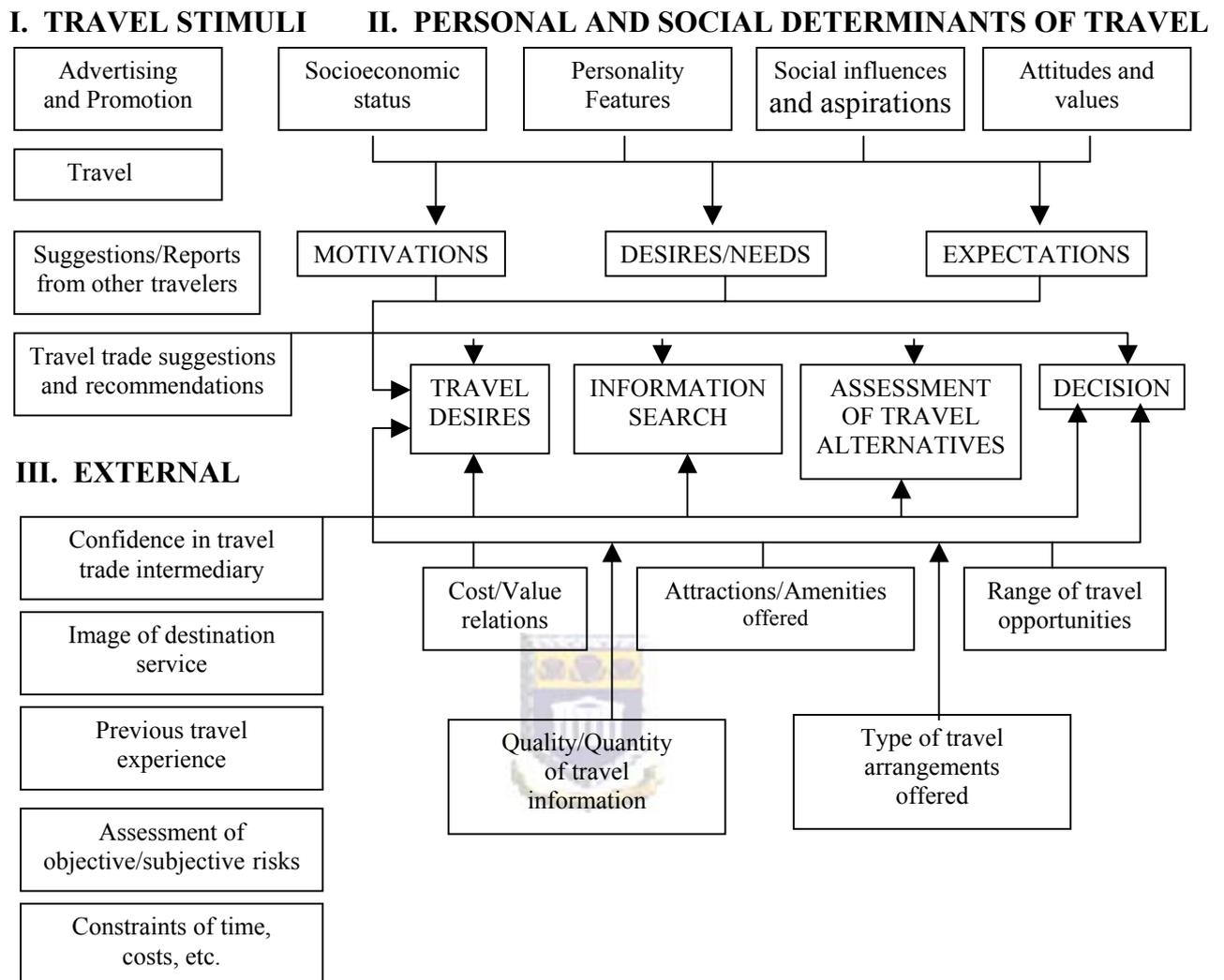
Field 2. Travel needs and desires determined by personality, socio-economic factors, attitudes, and values

Field 3. External variables such as confidence in the travel agent, destination image, previous experience, and cost and time constraints

Field 4. Destination or service-related characteristics that have a bearing on the decision process and its outcome

The model is noteworthy because it pays attention to constraints and their impact on the decision-making process.

Figure 3.3 The Travel Decision Process: A Model



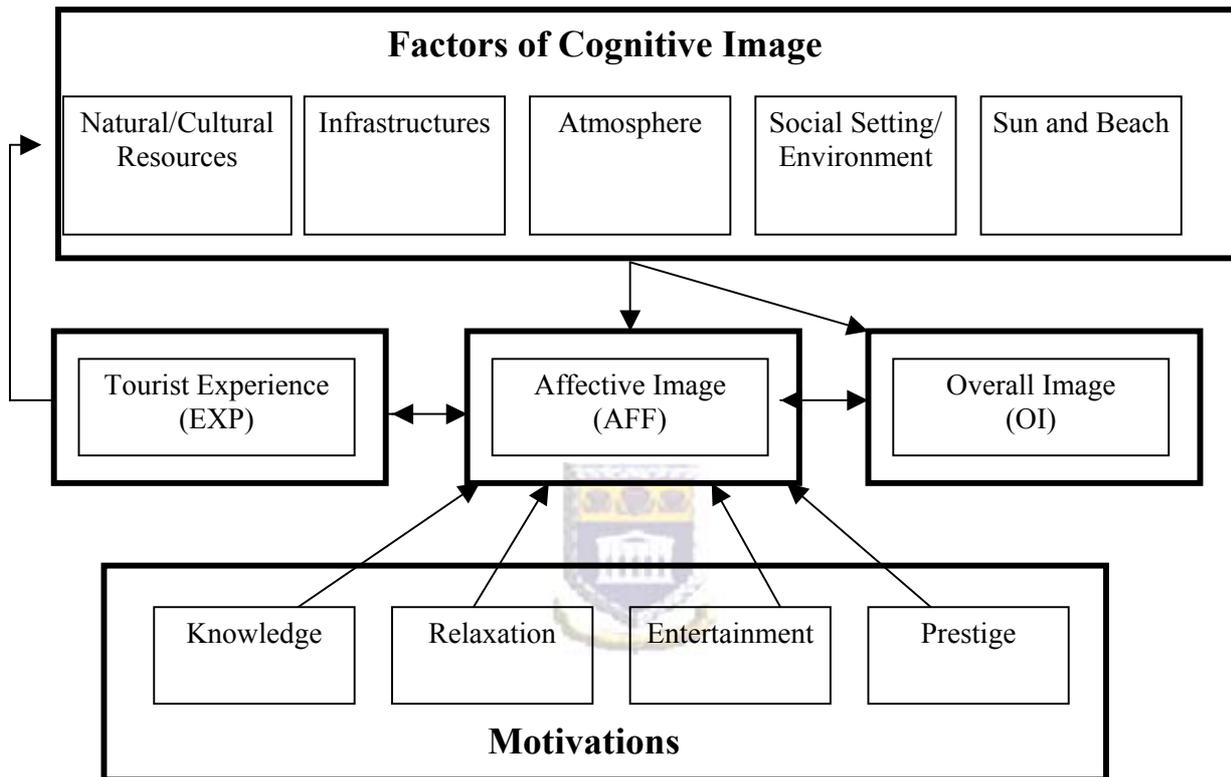
Source: Pizam & Mansfeld, 2000, Consumer Behaviour in Travel & Tourism

3.5 Model of Relationships Between Motivation and Perceived Image

In his model of relationships between motivation and perceived image, Beerli's (2004) points out that tourist destinations must be conceived as brands that have to be managed from a strategic point of view (see Figure 3.4). Therefore brand image plays

a fundamental role in the success of tourist destinations, since image, plays a significant role and has a strong influence on consumer behavior in the tourism sector.

Figure 3.4 Model of Relationships Between Motivation and Perceived Image



Source: Beerli & Martin, 2004

3.6 Positioning a Destination's Image

Positioning a destination's image in the minds of a target group of consumers is a core activity of Destination Marketing Organizations (DMOs). Middleton (1994: 227) points out that DMOs are primarily responsible for marketing countries and regions as tourist destinations. The principal marketing role of DMOs has been seen in fairly

narrow promotional terms of creating and communicating appealing destination images and messages to prospective visitors, mainly through advertising, public relations and print, as a necessary basis for the product-specific marketing activities of operations.

In the first place the DMO can formulate and develop the tourist product or products of the destination; secondly it can promote them in appropriate markets. It can base its approach to development and promotion on market research and thus achieve a close match between the products and the markets. In doing this the tourist organization is acting on behalf of all interests in tourism and on behalf of the whole destination and is complementary to the development and promotion activities of individual providers of tourist services.



Image represents a simplification of a large number of associations and pieces of information connected with the place. Day, Skidmore and Koller (2001) suggest that there should be congruence between the marketed image and the actual destination experience. For “place images” to be effective, they must:

- Be valid
- Be believable
- Be simple
- Have appeal
- Be distinctive

A traveler's choice of destination is influenced by a variety of personal and environmental factors. DMO attempting to promote SA or the Western Cape thus need to have an understanding of the motivations of the market sectors they address, and also their image of the destination.

3.7 Framework for Destination Image

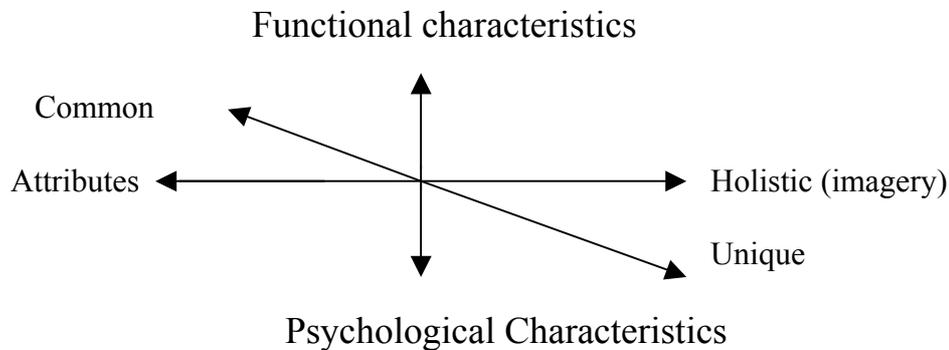
In the tourism marketing literature, various authors point out that tourist destination image is a concept that is widely used in the empirical context, but is loosely defined and lacking a solid conceptual structure. Authors tend to consider image being formed by the reasoned and emotional interpretation of the consumer and as the consequence of two closely interrelated components: (1) the perceptive/cognitive evaluations, which refer to the individual's own knowledge and beliefs about the objective and (2) Affective appraisals, which refer to the individual's feelings towards the objective (Beerli and Martin, 2004).

Generally speaking then, the tourists' personal factors influence the formation of tourist destination image. Tourists make travel decision after undergoing a process which, according to Pizam & Mansfeld (2000), consists of the following stages:

(1) Motivations of travel, desires and needs, expectations (2) Travel desires, information search, assessment of travel alternatives (3) Decision making.

Echtner and Ritchie (1993) developed a conceptual framework for the components of destination image as follows:

Figure 3.5. Components of Destination Image:



The image of the tourism product, the destination, should consist of these components. Each component had items that could have functional or psychological characteristics, and each characteristic could reflect common or unique features of the destination.



The diagram has three scales. The first continuum, attribute-holistic, is based on the idea that image is composed of specific individual attributes (such as climate, accommodation facilities, friendliness of the people) as well as more holistic impressions (mental pictures or imagery) of the place.

The functional-psychological continuum divides perception of the image into measurable characteristics (such as beaches, shopping facilities, national parks) and more intangible or psychological characteristics (such as friendliness).

The third continuum identifies unique attractions of the destination (such as the Great Wall in China) and common attractions (beaches and nature life).

(MacInnis and Price 1987; Rezende-Parker, Morrison and Ismail, 2002)

3.8 Destination Positioning and Marketing

It is important that the different interest groups operating in the tourism sector are aware of the destination image that the industry and related services seek to provide (Saayman, 2001). As with any business marketing plan, the improvement of a destination's image takes place over the long term.

In the South Africa context, SA Tourism, which operates under the guidance of the Department of Environmental Affairs and Tourism (DEAT), is responsible to market SA internationally. The DMO in the Western Cape, Cape Town Routes Unlimited, is an agency of provincial government that focuses on marketing and promotion of the province, the various regions, and various tourism products. Part of the responsibility of the DMO is also development from a marketing angle, in that it undertakes to provide marketing assistance to fledgling tourism companies in need of support.

The Survey of South Africa's Foreign Visitor Market, conducted for South Africa Tourism in 2001, shows that the Asian market is a valuable one and tends to increase. Analysis, by The Monitor Group to identify the international market also selected China as one of the Core Mass Markets for South Africa.

Threats from competitors such as Australia, Thailand, Brazil, Kenya and Morocco—as the main rival tourist destinations are also providing a signal of the necessity to market to China. To be effective a destination image positioning strategy should lead to favorable differentiation from competitors.

SECTION FOUR: RESEARCH METHODS

4.1 Introduction

A literature review of recent publications and marketing information was conducted, focusing on policies, laws, and “raw “ statistics, and secondary sources (articles in journals, academic books etc.), information related to the topic. As the author is based in the Western Cape and had limited resources and time available; and is unable to travel nationally or overseas to conduct in-depth interviews with the key industry operators in China, the literature review was supplemented with information gathered electronically from Chinese tour operators serving the South Africa market.



Economic data and forecasts (such as tourism statistics and information on growth sectors), existing research on tourism, including that produced on behalf of DTI, journal and newspaper articles, government policy documentation and a broad range of other published work from Western Cape Provincial tourism authority, Western Cape Investment and Trade Promotion Agency, statistics from Grant Thornton and some tourism organizations were the main sources of secondary information.

Primary research comprised semi-structured interviews with representatives of local and provincial tourism authorities (DMOs), marketing organizations and private sector operators involved in serving the target market, in order to establish existing policies and marketing initiatives developed, since China emerged as a market with great potential for inbound tourism.

Structured interviews with Chinese tourists were conducted to help the researcher to get valuable opinions to achieve the research objectives.

The needs, motivation and consumer behavior of tourists were examined to assist the researcher in analyzing the image of the destination, since this concept largely depends on the outsider's perception. The survey of tourists sought to identify the pull (destination image) and push (motivation) factors.

4.2 The Data Needed

The nature of the empirical research, focused on the image of South Africa among Chinese tourists currently visiting South Africa required the collection of primary data from the target population. Hence a survey focused on the travel motivation, image of South Africa and Cape Town was conducted in September/October 2004.

In addition to the survey, the researcher conducted semi-structured interviews with Chinese tourists in Cape Town, tour operators and local authorities in the Western Cape, and the South African Embassy in Beijing (via e-mail) during the period of August to October 2004.

4.3 The Target Population

The target population was those Chinese tourists who currently visiting South Africa from all age groups, genders, occupations and income levels.

Interviews have been conducted at the Cape Town International Airport and sightseeing places where Chinese tourists can be found. Because of resource and time constraints the survey was opportunistic rather than random.

4.4 Sample Size

The research targeted the Chinese tourists currently visited in the Western Cape Province (Cape Town) in South Africa since it was the top destination among Chinese tourists.

Due to the budget and time constraints, a sample size of 150 would have been ideal, with the assistance of the local tour operators, and friends. Ultimately, however, only 112 useable questionnaires were collected.



4.5 Sampling Methodology

A survey using a self-administrated structured questionnaire was conducted to collect the primary data from the Chinese tourists currently visited in the western Cape Province/ Cape Town. For simplicity and cost constraints, convenience sampling was deployed. The sample was selected with the assistance of several tour operators and tour guides and by referrals.

4.6 Pilot Test

The questionnaire was designed to assist the researcher identify key travel motivation and image of South Africa among visiting Chinese tourists.

In order to ensure the validity of the questionnaire, a pilot test was conducted in September at Century City, Canal Walk. The pilot test targeted those Chinese tourists already in Cape Town and was organized for group shopping.

The tourists were asked to complete the questionnaire and give comments or suggestions on the questionnaire. Attention had been placed onto the time requirement for completion.

4.7 Content of Questionnaire

The questionnaire (see Appendix 1) was divided into five sections. Eight questions were included to test general travel information of the respondents (Question 1-8). The selection of questions sought to identify whether the respondent was an experienced traveler or a first time traveler.

The next section collected socio-demographic information of the visiting tourists such as gender, age, occupation, education, income and marital status (Question 9-14). The third section investigated the travel motivation of the respondents (Question 15a-15x). The fourth section investigates the image of South Africa /Cape Town among the respondents. Thirty-five items were used (Question 16 a –16 jj). The final section addressed the way respondents obtained tourist information of South Africa.

In the third and fourth section, all attributes were composed of statements, evaluated using the five-point Likert scale.

Respondents were presented a series of statements in which they were asked to indicate their degree of agreement on a scale ranging from ‘Strongly disagree’ to ‘Strongly agree’. Likert’s scale is quite popular since it has been shown to be reliable, is easy to construct, and give more information about the respondent’s feelings than Thurstone’s simple agree/disagree (Chisnall: 1992).

4.8 Data Analysis

The received useable data were captured and analyzed using the SPSS program (Statistical Package for Social Science). Descriptive statistics and factor analysis was applied. Factor analysis was used to explore the structures of Travel motivation and the Image of South Africa sections respectively. The relative importance of the elements of the image score was assessed on the Likert scale of 1 to 5. The results are discussed in section 5.

SECTION FIVE: RESEARCH RESULTS AND DISCUSSION

5.1 Current Chinese Tourism to South Africa:

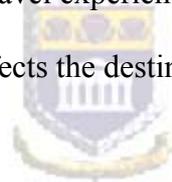
A qualitative analysis was undertaken during August/ September 2004 in order to develop an understanding of the current Chinese outbound travel market. Interviews were conducted electronically with the SA Embassy in Beijing and in person with DMOs and tour operators in Cape Town to get some background on the current Chinese tourism market to SA.

According to the SA Embassy in Beijing more than half of the Chinese visitors travel to SA on business or for official purposes. They are company paid or government paid "tourists". The ADS (Approved Destination Status) tourism market is growing rapidly, but tourists cannot travel to SA individually, as the ADS agreement with the Chinese government only allows the Embassy to issue group tourism visas. It is quite easy for Chinese tourists to travel to SA as both the Embassy in Beijing and the Consulate General in Shanghai can issue visas.

As there appears to be relatively little knowledge about SA in both the public and trade communities, growing market share is quite challenging. The Chinese market is also a price driven market. The Chinese travel agents cut prices to the bone due to the competition between different travel agents in order to get more Chinese citizens to make the overseas trips to SA and else where. This price-cutting sometimes has a negative effect on the quality of the SA tourism experience. Recent crimes against

Chinese (including both overseas Chinese people and tourists) in SA also have had a negative impact since many Chinese media reported those cases. The Embassy frequently has to address the question on SA is "Is it that safe to travel to SA?"

The interviews with various authorities (Mr. Linda Mase of the Provincial DMO and Mr. Steven Jin of SA Tourism's Beijing office) show that China really has growth potential and is a key emerging market for South African tourism. Through some major travel shows (e.g. CITM-The China International Travel Mart), the image of SA is gradually improving. From the Chinese operator perspective the market is price driven, which means the operator must primarily compete in terms of price. But this also impacts on the quality of the travel experience. Furthermore, negative reports on South Africa's crime status also affects the destination image.



The interviews with operators (Ms. Wendy Cao of Fullmark Tour, Ms. Mandi Johnson of Titch Tour, Ms. Irene Chow of United Tour Company, Mr. Mark Wang of African Eagle) can be summarized as follows and largely confirm the views expressed by government officials. Firstly, price is a huge issue for the tourists from China who compare SA with other popular destinations like Australia. At the same time, the image or the knowledge of South Africa as a tourist destination is also limited among Chinese tourists. Thirdly, most Chinese tourists who travel on holiday prefer to join guided tours due to the language barriers and their interest in visiting famous places like Table Mountain and Cape of Good Hope. Most tours are "8 days 5 nights"- two days in the plane, Cape Town for 3 days and Johannesburg for two days. South Africa's image among tourists consists of Mandela, Diamonds and gold.

In the following sections a quantitative analysis of the survey of Chinese tourists that addresses the above issues from their perspective is presented. We first present descriptive statistics. In later sections mean rankings of questions are conducted to better understand travel motivation and image of South Africa. The results of the destination image questions are then analyzed using Echtner and Ritchie's conceptual framework. Factor analysis is finally applied to the data in order to reduce factors for better focus of the study.

5.2 Descriptive Statistics

All 112 valid questionnaires were captured in SPSS for analysis. The demographic data was analyzed by descriptive statistics to produce a profile of the respondents. The demographics of the respondents that were visiting South Africa from China are shown in Table 5.1.

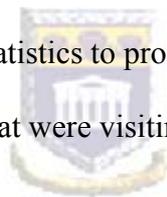


Table 5.1 Demographics of Survey Respondents (N=112)

Age	Education	Occupation
24-34 10%	Diploma 34%	Owner/self-employed 22%
35-44 60%	Bachelors 36%	White collar 40%
45-54 30%	Honours 30%	Professional/technical 10%
		Blue collar 1%
		Management position 23%
		Government official 4%
Sex	Overseas travel experience before SA	First time visit SA
Male 73%	Yes 65%	Yes 84%
Female 27%	No 35%	No 16%

Out of a total of 112 respondents in this study 73% were male. This is expected since there is a greater inclination for Chinese men to undertake travel. The age distribution is given in Table 5.1 with an estimated mean age of 41.5 showing people in the middle age bracket to dominate the traveling class. It is noteworthy that no senior citizens are in the sample. Most visitors to South Africa are white-collar workers (40%) and 66% of the visitors have a bachelors or honours degree.

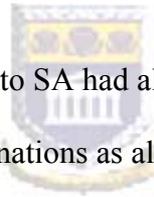
For most visitors (84%) this was their first visit to South Africa and most were visiting for a rather short duration. 78% planned to stay less than three days in Cape Town and 66% were on holiday, 29% for business and the other 5% to visit friends and relatives. This can be contrasted with the feedback from SA Embassy in Beijing that half of the visitors from China come for business purposes. While the majority of the respondents (65%) had overseas travel experience, it is interesting to note that for more than one-third (35%) of the respondents SA was their first overseas trip; 16% had visited South Africa before.

Table 5.2 Countries Visited Before South Africa and Rival Destinations Considered before Deciding on South Africa

Country	% Who visited before	% Who considered it rival for this trip
Hong Kong, Macau	49.1	11.6
Singapore, Malaysia, Thailand	33.0	56.3
USA	19.6	13.6
Japan, Korea	18.8	31.3
Europe	18.1	26.8
Canada	12.3	0.06
Australia, New Zealand	0.05	27.7

Table 5.2 indicates the countries that tourists had visited before coming to SA and the rival destinations that they considered before deciding to come to SA.

Hong Kong and Macau, followed by Singapore, Malaysia, and Thailand, were the favorite destinations for previous travel prior to visiting SA. The short distance from China and limited language barriers due to the prominence of overseas Chinese populations in all these destinations probably explains this. Table 5.2 shows that the competitors that South Africa faces regarding the Chinese market are those traditional destinations like Singapore, Malaysia, and Thailand, which rank first when the tourists consider overseas travel.



As almost half (49%) of the visitors to SA had already visited Hong Kong and Macau, but only 11% considered these destinations as alternatives to SA, they should not be considered alternatives to SA, but precursors to an overseas trip. The other long-haul destinations considered before choosing SA suggest that the country faces a very broad range of competitors, which include Japan, Australia and Europe.

The reasons for visit SA are shown in Table 5.3. It is noteworthy that the Cape of Good Hope (66%) and beautiful scenery as seen on TV (55%) feature prominently. The result also indicated almost 60% of the respondents had visited other countries before coming to SA, or in those experienced Chinese tourists, they probably considered SA as a better destination choice.

Table 5.3 Reasons for Choosing to Come SA

Reasons for Choosing to Come SA	Percent%
Fame of Cape of Good Hope	65.8%
Other destinations visited before	59.2%
Beauty scene of SA (from TV programme)	55.3%
Business trip (Company paid)	32.9%
Travel agent promotion	26.3%

To illustrate the image of South Africa among visiting Chinese tourists, we compared the respondents who had visited SA before and those who were visiting SA for the first time. Not surprisingly that visitors who were previously in South Africa will have a more positive image of the country than first time visitors.

5.3 Motivation Analysis



5.3.1 Mean Ranking of Motivation

In order to identify the reasons for traveling to SA, respondents were presented a list of 23 motivations and asked to rate each on a 5-point Likert scale.

The mean ranking of the motivation questions is shown in Table 5.4 together with frequency counts of respondents who “agree” and “strongly agree”. “Experience different culture” is the most often cited travel motivation (m=4.22; “strongly agree”=37). In descending order of importance, it was closely followed by “see country after change” (m=3.96), “know new place” (m=3.95), “fulfill dream of Africa” (m=3.93), and “rest and relaxation” (m=3.80). It was noted that only the

mean of the first motivation is over “4”, which represents “agree”. The first four reasons are cited by over 80% of respondents as among their motives for coming to SA.

Table 5.4 The Mean Ranking of Motivation

Rank & Statement	N	Mean	Agree	Strongly Agree
1. Experience different culture	112	4.22	63	37
2. See the country after change	112	3.96	76	16
3. Know new different places	112	3.95	77	15
4. Fulfill dream of Africa	112	3.93	84	10
5. Rest and relaxation	112	3.80	52	19
6. Visit historical attractions	112	3.78	69	9
7. Increase knowledge of SA	112	3.75	54	15
8. Intellectual improvement	112	3.68	68	4
9. Seek adventure and pleasure	112	3.65	63	5
10. Enjoy shopping entertainment & Cuisine	112	3.57	54	5
11. Business travel	112	3.57	48	12
12. Seek diversion & entertainment	112	3.55	62	0
13. Go to places friends not visited	112	3.53	60	0
14. Tell friends the experiences	112	3.46	55	3
15. Alleviate stress and tension	112	3.41	48	0
16. Gambling/Sun city	112	3.36	40	0
17. Go fashionable places	112	3.34	39	0
18. Travel agent promotion	112	3.31	39	0
19. Escape daily routine	112	3.21	29	0
20. Do exciting things	112	3.09	20	0
21. Attend culture events	112	2.72	6	0
22. Visit friends or relatives	112	2.59	6	0
23. Participate in sports	112	2.46	0	0
Average			9.9	1.3

Overall, while the respondents cited an average of ten reasons for visiting SA, they only identified one strong motivation for traveling to SA. This suggests that there are many marketing opportunities to strength the motivation of potential Chinese tourists to SA.

The estimates of the SA Embassy that 50% of Chinese tourists to SA are business visitors is supported as more than half (54%) of the respondents indicated that one reason for visiting was ‘ Business travel or seeking business opportunity’. In only three cases was the mean of a motivation factors below “3”, which represents “ Disagree”. The attribute with the lowest mean score was “ participate in sports”(m=2.46).

5.3.2 Factor Analysis for Motivation

Exploratory factorial analysis was undertaken on the variables referring to perceived travel motivations with the aim of reducing their dimensions and identifying the set of underlying factors that summarize the essential information in the variables. The results of those analyses are shown in the following tables.

Before the factor analysis is attempted unreliable variables must be excluded from the factor analysis. The MSA (Measure of Sampling Adequacy) is used to identify variables with an MSA under 0.5 that are regarded as unreliable for use in factor analysis. Using the MSA test five of the perceived motivational variables with MSA under 0.5 were excluded from the factor analysis. The excluded motivational variables were: “To know new, different places”, “ To visit historical attractions”, “ To visit friends or relatives”, “ To seek adventure and pleasure” and “ For Gambling/Sun City”. As a result of these exclusions the Kaiser-Meyer-Olkin measure of sampling adequacy increased above the threshold of 0.6 to 0.678.

Table 5.5 Factor Analysis of Motivation

Variable	Social	Exploration	Activity	Follow Legends	Business & People
Rest and relaxation	.814				
Go to places friends have not visited	.768				
Experience different life style and culture	.657				
Do exciting things	.639				
Enjoy shopping	.586		.468		
Entertainment & different cuisine					
Tell friends about experience	.580				
Seek diversion and entertainment		.761			
Escape daily routine					
Intellectual improvement		.741			
Fulfill dream of Africa		.585		.417	
Travel promotion			.790		
Participate in sport (e.g. golf)			.772		
Alleviate stress and tension			.666		
Attend culture events	.423				
See country after Political change (Mandela image)				.793	
Go fashionable places				.553	
Business or seek business opportunity					.710
Increase knowledge of SA and its people					.620
Eigenvalue	3.58	2.93	2.47	1.49	1.41
% of variance explained	19.91	16.25	13.74	8.28	7.82
Cumulative % explained	19.91	36.16	49.90	58.18	66.00

Extraction Method: Principal Component Analysis.

Rotation Method: Varimax with Kaiser Normalization.

The remaining 18 variables were then analyzed. For the purposes of optimizing and checking the stability of the solution, the data was run twice with principal

components analysis and varimax rotation analysis. The choice of the five-factor solution (see Table 5.5) was based on the following criteria:

- The eigenvalues for all factors were greater than 1.00.
- The total variance explained was 66%.
- Variables with weightings below 0.4 were excluded.

The five factors that were identified as the most important motivations identified by Chinese visitors to South Africa can be labeled: social, exploration, activity, follow legends and business and people.

The first factor (See Table 5.5) extracted was composed of seven attribute statements and was named “Social” based on the statements concerning experience different life style and culture, do exciting things. The other statements were related since they emphasized the social elements of travel. This factor had the highest eigenvalue (3.58) and explained 19.91% of the variance.

The second factor, “Exploration”, included statements such as “seek diversion and entertainment”, and “fulfill dream of Africa”. This factor had an eigenvalue of 2.93 and explained 16.25% of the variance. Factor three grouped four statements related to an activity based vacation including shopping, travel package, sports, and to alleviative stress and tension. It had an eigenvalue of 2.47 and explained 13.74% of the variance.

“Follow Legends” was the fourth factor identified and includes three-attribute statements related to legend, such as “Mandela image”, and “fulfill a dream of Africa”. Its eigenvalue was 1.49 and the variance explained was 8.28%.

Factor five was named “ Business and People”, had an eigenvalue of 1.41 and explained 7.82% of the variance. These were labeled together because knowing the people and the country better are closely related to exploring business opportunities.

Table 5.6 Groups Ranking of Motivation Factors

Follow Legends:	See country after political change (Mandela image)	3.96
	Go to fashionable places	3.34
	Fulfill dream of Africa	3.93
	Average	3.74
Exploration:	Intellectual improvement	3.68
	Seek diversion and entertainment	3.55
	Fulfill dream of Africa	3.93
	Average	3.72
Business and People:	Business travel	3.57
	Increase knowledge of SA and people	3.75
	Average	3.66
Social:	Go places friends have not visited	3.53
	Rest and relaxation	3.80
	Experience different life style and culture	4.22
	Do exciting things	3.09
	Enjoy shopping, entertainment	3.57
	Tell friends about the experiences	3.46
	Average	3.59
Activity:	Travel promotion	3.31
	Participate sport	2.46
	Alleviate stress and tension	3.41
	Enjoy shopping	3.57
	Average	3.18

While factor analysis can be used to explain variance in the data it is interesting to identify the relative importance of the five factors based on the means of the variables/questions in each factor. This is shown in Table 5.6, that on average the elements constituting the Follow Legends (3.74) is the highest average, followed by Exploration (3.72), Business and People (3.66), and Social (3.48). Activity (3.18) motive has the lowest average and is practically insignificant.

5.4 Destination Image Analysis

5.4.1 Mean Ranking of Destination Image

In order to identify the perceived image of SA, respondents were presented a list of 35 items and asked whether or not they associated the items with SA on a 5-point Likert scale. The mean ranking of image is shown in Table 5.7 together with frequency counts of respondents who “agree” and “strongly agree”. On average respondents agreed with 17 statements and strongly agreed with two statements.

“Mandela image” is the most often cited of the statements (m=4.48; “strongly agree”=54). It partly matches the results that interviews with the tour operators identified. In descending order of importance, it was closely followed by “wildlife and flowers” (m=4.44), “diamonds and gold” (m=4.32), “shopping facilities” (m=4.13) and “handicrafts” (m=3.82).

It was noted that the means of the first four image variables are over “4”, which represents “agree”. The four items highest on the list suggest possible themes that

Table 5.7 Ranking the Elements of Destination Image of South Africa

Variable	N	Mean	Agree	Strongly Agree
Mandela image	112	4.48	58	54
Great variety of wildlife and flowers	112	4.44	63	49
Diamonds and gold	112	4.32	72	38
Shopping facilities	112	4.13	71	28
Handicrafts	112	3.82	82	5
Different cuisine	112	3.77	64	11
Good beach scene	112	3.77	62	12
Places of historical or cultural interest	112	3.77	60	13
Good value for money	112	3.73	66	8
Fast growing African country on globe stage	112	3.68	62	7
Unusual customs and ways of life	112	3.67	65	5
Rainbow nation with cultural diversity	112	3.67	63	6
High quality of service	112	3.64	72	0
Hospitable and friendly people	112	3.64	70	1
HIV/AIDS	112	3.63	70	0
Casino and gambling	112	3.62	69	0
Beauty of cities and towns	112	3.62	68	0
Richness and beauty of landscapes	112	3.60	67	0
Good weather	112	3.58	65	0
Interesting excursions	112	3.56	63	0
Business opportunity (FDI)	112	3.52	58	0
Many package vacations available	112	3.52	58	0
Developed infrastructure for tourists	112	3.48	54	0
Insecurity (crime/violence)	112	3.46	50	1
Underprivileged society with poverty	112	3.45	50	0
Interesting cultural activities	112	3.39	42	1
High standard of cleanliness, hygiene	112	3.38	42	0
Fashionable place to visit	112	3.38	42	0
High level of economic development	112	3.35	39	0
Night life and entertainment	112	3.30	33	0
Luxurious place	112	3.30	29	0
Exotic atmosphere	112	2.98	13	0
Opportunities for sport activities	112	2.86	0	0
Terrorist	112	2.36	0	0
Average			16.8	2.1

could be developed by DMOs to build a stronger image of SA as a destination or to identify the possible focus of a tour package.

Table 5.8 Groups Ranking of Destination Image

Natural (resources and environment):	Wildlife and flowers	4.44
	Diamonds and Gold	4.32
	Good Beach scene	3.77
	Beauty of the cities	3.61
	Beauty of landscape	3.60
	Good weather	3.58
	Average	3.89
Political and Economic Factors:	Mandela image	4.48
	Good value for money	3.73
	Fast growing country	3.68
	Business opportunity	3.52
	Insecurity	3.46
	Economic development	3.35
	Terrorist attacks	2.36
Average	3.70	
Social Environment (history, art and culture)	Handicrafts	3.82
	Historical or culture interest	3.77
	Unusual customs	3.67
	Cultural diversity	3.66
	Hospitable, friendly people	3.64
	HIV/AIDS	3.63
	Society with poverty	3.45
	Interesting cultural activities	3.39
Average	3.63	
Tourist Infrastructure (leisure and recreation)	Shopping facilities	4.13
	Different cuisine	3.77
	High quality of service	3.64
	Casinos and gambling	3.62
	Interesting excursions	3.56
	Packaged vacations available	3.52
	Infrastructure for tourists	3.48
	Cleanliness and hygiene	3.38
	Nightlife & entertainment	3.29
	Entertainment sports activities	3.26
	Sporting activities	2.86
Average	3.56	
Atmosphere of the Place:	Fashionable place	3.38
	Luxurious places	3.26
	Exotic atmosphere	2.98
	Average	3.21

Only three image factors occurred below “3” in terms of mean, which representing “Disagree”. The attribute with the lowest mean score was “terrorist”(m=2.36) which confirmed the international perception currently and suggesting that this element is not considered important at all.

5.4.2 Group Ranking of Destination Image

In Table 5.8, scores are provided for each category into which the items were divided; namely nature, tourist infrastructure, and social environment, political and economic factors and atmosphere of the place. This categorization is based on the categories developed by Echtner and Ritchie (1993) and Beerli and Martin (2004) in their studies of Jamaica and Spain.



From the table, it shows that the natural category ranks first with an average of 3.89, which includes “Great variety of wildlife and flowers” as the most cited item (4.44). The next category is political and economic factors (average 3.70), with Mandela image (4.48) having the highest score. This category is particularly interesting because it seems to capture some elements of SA’s image from “business” tourists who combine pleasure with an economic motive.

The very low ranking of the “Atmosphere of the Place” perhaps reflects the lack of marketing and advertising expenditure to attract the attention of the target audience.

5.4.3 Components of Destination Image

The data above suggests that South Africa attracts Chinese tourists mainly because of its natural environment, customs and culture, historical attractions, and Mandela as a political icon. Therefore destination marketing, which is the key responsibility of government agencies such as national DMOs and their provincial, regional and community counterparts should emphasize these aspects in performing its role within the overall tourism system (Weaver and Opperman 2000: 223).

In order to assist DMOs and related organizations to develop a marketing strategy; some factors that contribute to the image of South Africa can be highlighted by applying Echtner and Ritchie's three-dimensional model, which was depicted previously in Figure 3.5. The components of destination image were envisaged to fall along three continuums:



- a) Attribute-holistic
- b) Functional-psychological, and
- c) Common-unique.

Since it is difficult to deal in three dimensions, Figures 5.1, 5.2, and 5.3 separate the components of destination image into a series of two-dimensional diagrams.

We have only included the mean scores over 3.50 (See Table 5.7) except for two items, which are included because of current international perceptions. "Terrorist attacks"

which has a very low average (2.36), and the item “Insecurity (crime/violence)” (3.46), which also reflected on the SA Embassy’s statements.

Figure 5.1 The Attribute/Holistic and Functional/Psychological Components of Destination Image (South Africa)

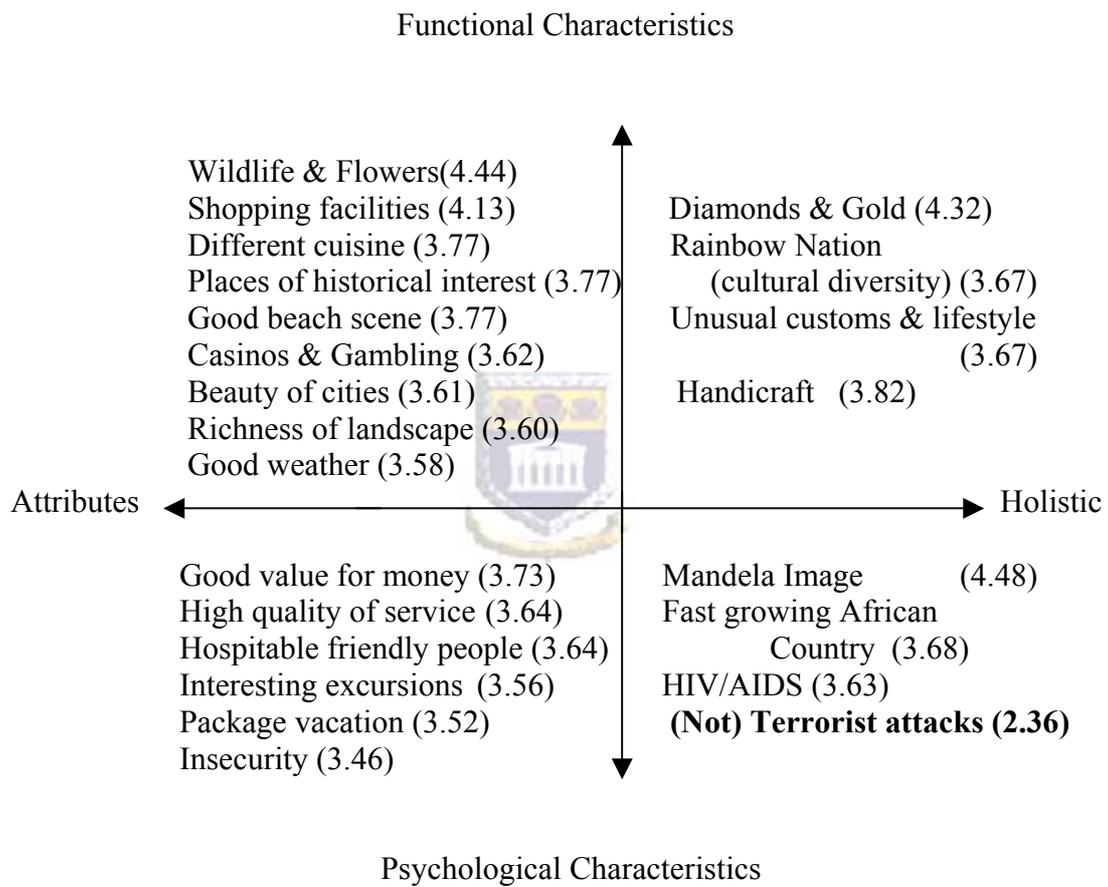
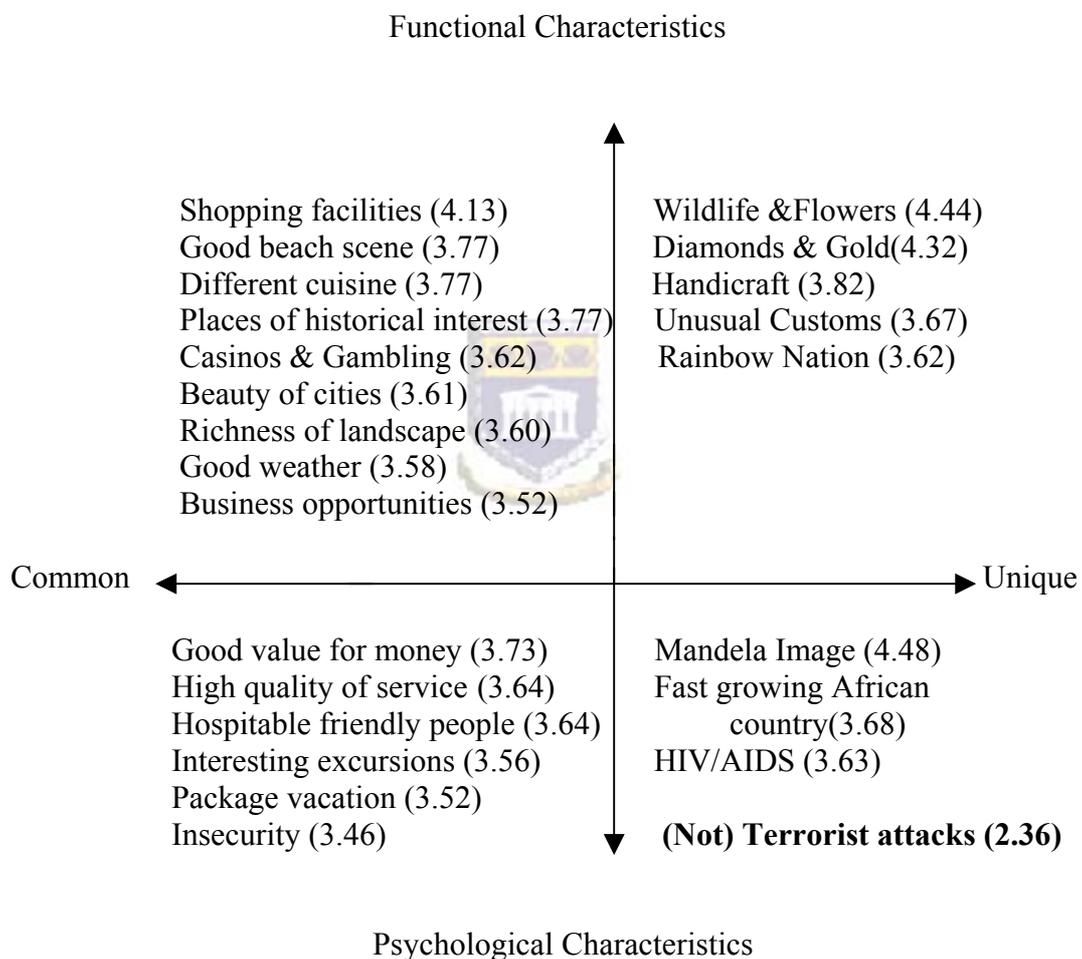


Figure 5.1 provides the attitude- holistic and functional-psychological components of South African image as a tourist destination among Chinese people. Scale scores for several functional attributes of South Africa are presented in the upper left quadrant of

the figure. These include of shopping facilities, places of historical interest, different cuisine, and good beach scene, beauty of cities, richness of landscape, casinos and gambling and good weather. On the right side of the figure most items fall in the

Figure 5.2 The Common/Unique and Functional/Psychological Components of Destination Image (South Africa)



political and economic category (e.g. fast growing African country, diamonds and gold, and Mandela image etc.) These provide functional holistic image, while the diversity of culture was seen to be more psychological in terms of its contribution to

the overall atmosphere of South Africa. The absence of Terrorist attacks, as a factor in SA's destination image is an important psychological comfort to tourists.

In Figure 5.2, the common-unique and functional-psychological components of destination image are illustrated. The scale items were not only effective in measuring the common characteristics of destination image in terms of both functional and psychological attributes (the two left quadrants), but also identify the distinctive and unique component, which explain the unique attraction of South Africa. In addition to Mandela's image a significant number of unique functional characteristics is identified such as Wildlife and flowers, gold and diamonds, handicrafts, places of historical interest, cuisine and unusual customs.

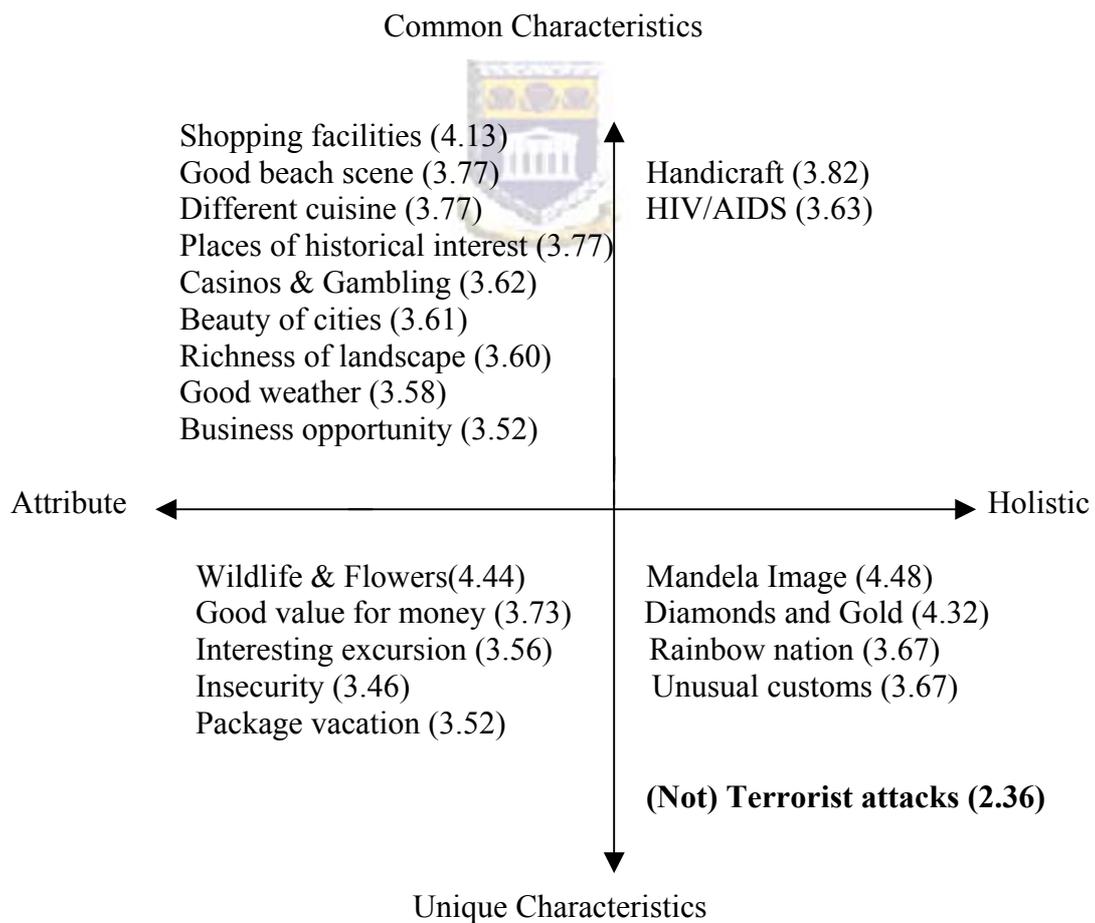


Finally, in Figure 5.3, the attribute-holistic and common-unique components of image are shown. The left side of Figure 5.3 presents an interesting challenge in terms of separating the holistic imagery of South Africa into common and unique components. The negative image of HIV/AIDS was regarded as one of the common characteristics of South Africa but it may be uniquely identified with the country because of the distinctive policies of the government.

The placement of the items within the diagram by the author is somewhat subjective, but still it gives a clearer idea of how the respondents pictured South Africa in their minds in terms of its unique attractions and holistic images as, for instance, people enjoy the wildlife, are impressed by the Mandela image and cultural diversity, but also identify the negative image of HIV/AIDS with SA.

The overall image of South Africa as a tourist destination should be envisaged as combination and interaction of all of the components-attributes, holistic, common, unique, functional, and psychological. However, the series of figures has been presented to illustrate that a combination of methodologies is necessary to capture destination image in its entirety (Echtner and Ritchie: 1993).

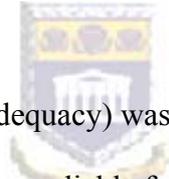
Figure 5.3 The Attribute/Holistic and Common/Unique Components of Destination Image (South Africa)



5.4.4 Factor Analysis of Destination Image

Exploratory factorial analysis was undertaken on the variables referring to perceived image of SA with the aim of reducing their dimensions and identifying the set of underlying factors that summarize the essential information in the variables. The results of those analyses are shown in Table 5.9.

Principal Component Analysis and Principal Axis Factoring analyses were performed to identify meaningful factors. Only the variables included in the Destination Image framework in the previous section were used. Before the factor analysis was attempted unreliable variables must be excluded from the factor analysis.



The MSA (Measure of Sampling Adequacy) was used to identify variables with an MSA under 0.5 that are regarded as unreliable for use in factor analysis. Where possible the variables with highest averages were retained because of their integral role in SA's destination image.

Using the MSA test five of the perceived image variables with MSA values lower than 0,5 were excluded from factor analysis. The excluded image variables were: "good weather", "beauty of cities and towns", "richness and beauty of landscape", "high quality of service" and "hospitable, friendly people". As a result of these exclusions the Kaiser-Meyer-Olkin measure of sampling adequacy increased above the recommended threshold of 0.6 to 0.6134. The remaining 18 variables were then analyzed.

For the purposes of optimizing and checking the stability of the solution, the data was run twice with Principal Axis Factoring (PAF) and Principal Component Analysis (PCA). A number of negative factor loadings initially occurred in the factor analysis using both estimation methods. This normally indicates a scaling adjustment is necessary mainly because some items are expected to be identified with the destination image but the respondents generally thought otherwise.

Table 5.9 Factor Analysis of Destination Image

Variable	Social and Natural	Customs and Artifacts	Shopping Value	Business	African Image	No Label
Different cuisine	.829					
Places of historical & cultural interest	.629					
Fast growing African country on global stage	.770					
Great variety of wildlife and flowers	.432					.455
Diamonds and gold		.789				
Unusual Customs & ways of life		.759				
Shopping facilities			.716			
Good value for money			.814			
Mandela image			.560		.524	
Handicraft		.420			.602	
Rainbow nation (cultural diversity)				.846		
Business opportunity (FDI)				.815		
Interesting Excursions					.745	
Terrorist attacks	-.435		-.402			.482
Eigenvalue	2.33	1.78	1.74	1.73	1.70	1.30
% of Variance	15.5	11.9	11.6	11.6	11.6	8.7

Extraction Method: Principle Component Analysis.
 Rotation Method: Varimax with Kaiser Normalization.

The main reason in this case appears to be the low level of identification of some of the factors with the tourists' images of SA. As a result there are many instances of “neutral” answers in the data, which has made analysis difficult.

Four variables with negative factor loadings (i.e. images not associated with SA) using both PCA and PFA were removed from the analysis and the number of items trimmed to 14 (See Table 5.9). The variables removed were “ HIV/AIDS”, “ Casinos and Gambling”, “ Insecurity”, and “ Good beach scene”.

The choice of the six-factor solution was based on the following criteria:

- The eigenvalues for all factors were greater than 1.00.
- The total variance explained was 70.9 %.
- Variables with weightings below 0.4 were excluded

The first factor (See Table 5.9) extracted was composed of four attribute statements and was named “social and natural ” based on the statements concerning “Places of historical and cultural interest”, “Fast growing African country on global stage”, “Great variety of wildlife and flowers”. This factor had the highest eigenvalue 2.33 and explained 15.5% of the variance.

The second factor, “ Customs and Artifacts” had an eigenvalue of 1.78 and explained 11.9% of the variance. Factor three grouped the statements related to “Shopping

Value” which includes “Mandela Image”. It had an eigenvalue of 1.74 and explained 11.6 % of the variance. “ Business” was the fourth factor that had an eigenvalue of 1.73 and explained 11.6% of the variance. It includes two attribute statements, which do not appear to be related too closely. However, it is important for any potential business partner to understand SA’s cultural diversity if they are to conduct business successfully.

Factor five was named “ African Image” as it combined handicrafts and interesting excursions with Mandela’s image. It had an eigenvalue of 1.70 and explained 11.6 % of the variance. The sixth and final factor was not named, as it appeared to include a number of unrelated variables.



The five factors were identified as the most important images when Chinese tourists considered visit South Africa: Social and Natural, Customs and Artifacts, Shopping Value, Business, and African Image.

5.5 Model of the Perceived Image of South Africa

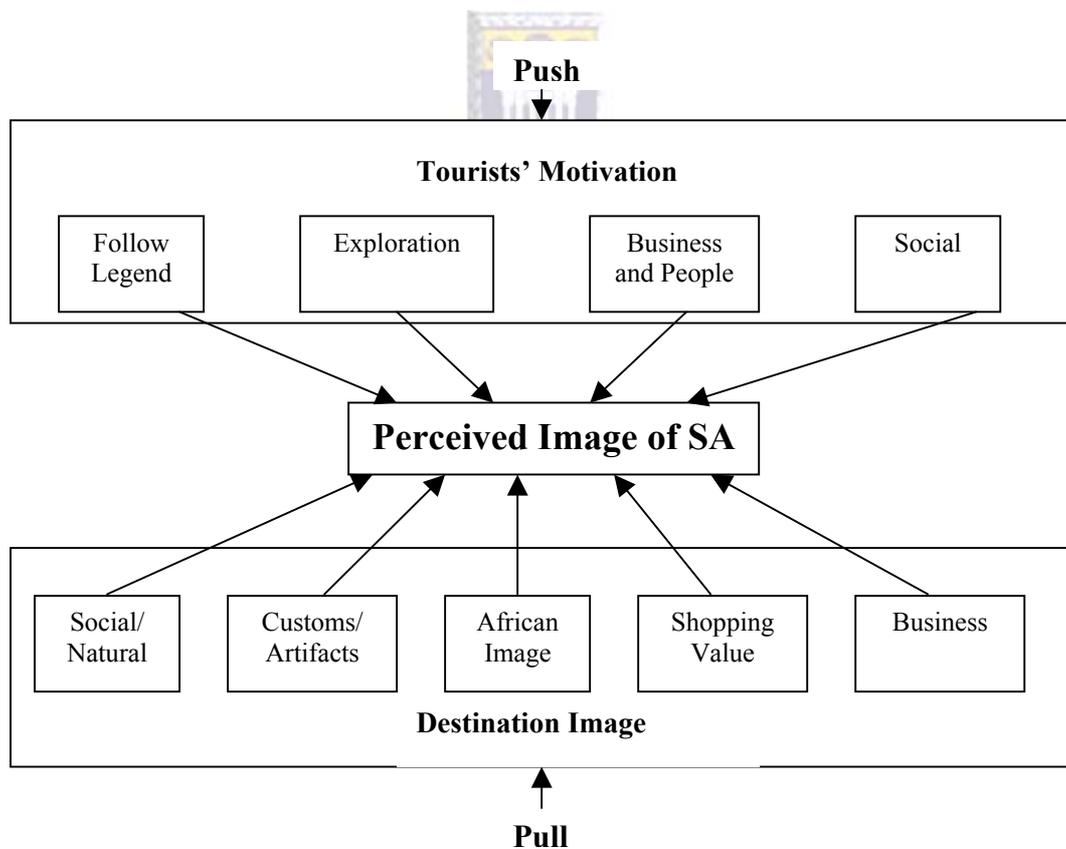
In this section, we explored various methods to conduct motivation and image analysis by applying push and pull theory and Beerli’s model of relationships between motivation and perceived image (See Figure 5.4).

As was discussed in the literature review of pull and push factors and Beerli’s model of relationships between motivation and perceived image, the following model was

developed to illustrate the components of image of South Africa as a tourist destination.

This model can improve the understanding of demand-led tourism development, which refers to tourism development that is focused on the needs, expectations and wants of tourists rather than the suppliers of the tourism service or the supply of physical infrastructure. Several factors were identified in order to construct the perceived image of South Africa (See Figure 5.4).

Figure 5.4 Model of the Perceived Image of SA



In this model, Beerli identifies tourists' motivation as the key push factor, which describes the needs of the tourists (or market demand forces). It was represented by the following factors: Follow Legends, Exploration, Business and People and Social, (See Table 5.6). The concept of destination image is a key pull factor that attracts tourists towards the destination (or supply side product or destination-based forces).

It is difficult to draw a clear conclusion from the factor analysis since many respondents seemed to have limited specific knowledge about SA's image. However the following factors can be included under pull factor to build up the model: Social and Natural, Customs and artifacts, African Image, Shopping value and Business.



SECTION SIX: CONCLUSION

The study seeks to highlight the relationship between destination image and the Chinese consumers' motivation to travel to South Africa. By identifying the image preferences of Chinese tourists while visiting SA, the received useable data were captured and analyzed using the SPSS software (Statistical Package for Social Science). Descriptive statistics and factor analysis were applied. Factor analysis was used to explore the structures of Travel Motivation and the Destination Image of South Africa.

The study concludes with some recommendations regarding marketing strategy, which related destination image, a discussion of the limitations of the research, and some suggestions for further research.



6.1 Recommendations

Recommendations are based on the research results and analysis, and the literature review. The literature review demonstrated that in order to market SA or any other country as a tourist destination, consumer behaviour needs to be considered.

Therefore push and pull factors and the relationship between motivation and perceived image were highlighted.

Understanding these factors will also be valuable for DMOs and travel agents when they draw up marketing strategies related to the Chinese market. Some of the following aspects should be emphasized that currently may have been ignored by marketers.

6.1.1 Destination Image as a Component of the Tourism Product

The key element of the tourism product is the image (South Africa's image) that tourists from China have of the destination. In our survey we found that respondents were unable to distinguish between the image of SA and that of Cape Town so a single destination image was used. According to Bennett and Strydom (2001), the images of the particular travel and tourism product (South Africa) are mainly formed on the basis of four attributes:

- a. Marketing communication
- b. Previous experience of the destination
- c. Word-of-mouth recommendations from friends and /or family
- d. The prospective tourist's immediate needs (i.e. motivation)



This research found the following types of marketing communication influenced the destination image: Internet (81%), newspapers (81%) and TV programmes (100%) since most of respondents highlighted these as sources of information about SA. Only 50% has relied on advertisements as sources of information on SA. Less than one-quarter (22%) received information from friends and relatives.

As most Chinese visitors had overseas travel experience can be reasonably conclude that their previous visits to other destinations, such as Hong Kong, Macau, Singapore, Malaysia, and Thailand, influenced their motivations and perceived image of SA. We also found that prior visits to SA influenced the destination image. By comparing the

respondents who had visited SA before (16%) and those who were visiting SA for the first time, not surprisingly we find that visitors who were previously in South Africa will have a more positive image of the country than first time visitors.

6.1.2 Targeting Specific Markets by Using Benefit Segmentation

Traditional techniques of marketing segmentation tended to be based on ex-post-descriptive rather than causal factors. Thus, Haley (1968) introduced benefit segmentation as a technique for identifying market segments by causal factors.

Benefit segmentation was seen as having a much wider range of applications than traditional segmentation methods and techniques since it provided marketers with a fuller picture of customers, from their motivation profiles to behaviour that might be useful in a positioning or promotional strategy. Four categories have been identified when applying benefit segmentation in travel and tourism (Frochot and Morrison: 2000):

- Destination marketing
- Targeting specific markets
- Attractions, events, and facilities and
- Examining traveler decision making process

The reason for choosing benefit segmentation in tourism is its focus on travelers' (Chinese tourists') motivations which have always been portrayed as a critical variable in the decision making process (Crompton, 1979; Lamdberg, 1971). As a result of this research we can identify a number of implications and lessons for DMOs

and tour operators regarding image selection and tourist motivation. It is important to match features of the destination image with the motivation of tourists to travel to the destination (See Table 6.1).

Table 6.1 Lessons for DMOs and Tour Operators

	DMOs	Tour Operators
Image	<ul style="list-style-type: none"> • Highlight African theme • Social and natural • Business 	<ul style="list-style-type: none"> • Focus on Mandela Image as an attraction • Shopping value
Motivations	<ul style="list-style-type: none"> • Business and people • Follow legends 	<ul style="list-style-type: none"> • Exploration

For DMOs, it is suggest that three factors should be emphasized in terms of image selection: African image, Social and Natural, and Business opportunity. This implies that SA can be marketed as a destination for certain target groups. But on the contrary, for tour operators, it is better to highlight some common attractions such as the Mandela image and shopping value as SA's image in order to attract Chinese tourists. The main reason for the different focus areas probably due to the financial cost related marketing strategy involved (As DMOs are easy to get fund from government, and most of tour operators are small private sectors which normally means less budget).

Meanwhile, DMOs should focus on those tourists with these motives named Business and people, and Follow legend. This can be matched with abovementioned image selection suggestions. In particular, DMOs can work with trade and investment

promotion agencies to the business/tourist market from China. And for tour operators, they will benefit by concentrating on the theme of exploration since most of the tourists prefer to “Fulfill dream of Africa ”and “ Intellectual improvement”, which can be matched to the image selection suggested above (Mandela image and shopping value).

6.1.3 Demand-led Tourism Development

Demand-led tourism development suggests that South Africa tourism development should focus on the needs, expectations and wants of the Chinese tourists rather than the suppliers of the tourism product or the supply of physical infrastructure (*White Paper on Sustainable Tourism Development and Promotion in the Western Cape.*)

Chinese tourists are motivated to travel to SA by four motives: Follow Legends, Exploration, Business and People and Social. Therefore any marketing strategy should focus on one or more of these motivations.

In order to develop a marketing strategy, DMOs firstly need to identify a target market, and then conduct analysis on consumer’s need (may be SWOT analysis will help), finally decide type of strategy, e.g. public relations and network strategy, or co-operative partnership strategy. For example, if the target market is those people with business purpose, they may want to know government policies details about the investment environment, and certain industry information. Therefore this strategy will be better under-taken in partnership with DTI (Department of Trade and Industry) in order to supply fuller pictures regarding the SA business environment.

6.2 Limitation of the Research

The potential limitations of the research are discussed in order to focus attention when applying the research results. I then provide suggestions for future research.

6.2.1 Sampling Errors

There can be little doubt that the data are marked by errors. It is hardly possible to conduct a study that does not contain errors or an element of bias. The sample may differ from the population simply because it does not include every individual. We minimize this error by taking a random sample. But even a random sample may differ from the population, thus causing an error in measurement (Antonius, 2003).



The questionnaire was designed to collect information from the Chinese tourists about South Africa and Cape Town separately, but the reality is that most of the tourists could not distinguish between the two options. Therefore it not possible for the researcher to compare them. But it also a signal that when the Western Cape DMOs develop a marketing strategy towards the Chinese market, they should be careful to ensure that potential tourists understand the difference between the province's attractions and those of South Africa as a whole.

6.2.2 Convenience Sampling

Although there are an increasing number of Chinese tourists visiting South Africa, due to the limited amount of time and human resources, convenience sampling was chosen as the research method. Data reduction using factor analysis did not succeed as

well as originally planned, as there was no prior published literature on SA's destination image that could be used as a starting point for this study. This may also be due to the limited number of respondents sampled. However, the other analytical tools used provided more useful insight into the travel motivation and image of South Africa among the visiting Chinese tourists. In order to identify key factors influencing tourists' decision-making future factor analysis should be based on more substantial number of cases.

6.2.3 Other Factors

Over time, and as the number of tourist's increases, more reliable data can be collected. If possible, follow up research needs to be conducted in order to update the research findings since the market is expected to change dramatically as the growth of Chinese tourism expands from the elite to the middle classes.

The questionnaire was first designed in English and then translated to Chinese. It is possible that some expressions may have been interpreted improperly due to the language and translation barriers. Therefore the actual meaning of the questions could have been understood incorrectly when making the translation.

6.3 Further Research

The following suggestions for further research on the subject are recommended.

More research could be done on benefit segmentation since it has a much wider range of applications than traditional segmentation methods and techniques. It also provides marketers with a fuller picture of customers, from their motivation profiles to behaviour that might be useful in a positioning or promotional strategy. Therefore the tourists' motivations identified in this research can be further test or redone periodically due to the dynamic nature of the Chinese tourist market environment.

Due to the increasing investment between South Africa and China, more and more business delegations are visiting South Africa. It is worth further study to explore whether SA could be marketed to China as a business destination.

Research drawing on statistics from the South Africa Embassy of China should be conducted since the Embassy issues visas to Chinese citizens. It also should be possible to access information to identify individual the travel purposes.

6.4 Conclusion

The purpose of this study was to help to identify the current perceptions of SA's image in the Chinese market. To achieve this, both structured and semi-structured methods of destination image measurement were applied, as suggested by Echtner and Ritchie and Beerli.

The central argument is that the approach of the South Africa (SA) tourism industry towards image selection in positioning the destination in the Chinese market should take into account the current perceptions of the people of China who are visiting SA and their motivation to travel. Therefore the perceptions and travel motivation of the Chinese tourists were identified.

In terms of the destination image that attracted these people to visit SA, the analysis indicated that Mandela's image, the wide variety of flora and fauna, a growing African economy on the global stage, diamonds and gold, and different cuisine are high in the list. Terrorists were lowest on the list. South Africa is also viewed as an HIV/AIDS country, which shows the negative perceptions about SA. Therefore it is very important for South Africa and DMOs to address these perceptions if it is to improve the image of SA held by potential visitors and become more competitive in the Chinese market.

Regarding the marketing strategy can be developed from the above finding, the push (motivation) factor and pull (image) factor should take into account by:

- Consumer promotion (pull strategy),
- Travel trade marketing (push strategy)

Moeketsi Mosola (2004), Chief Executive Officer of South African Tourism recently stated that SA Tourism was committed to marketing the country using global benchmarks. He stated that South Africa is at the forefront of preserving and

conserving the national treasures for the enjoyment of future generations and the world at large. This research confirms that these efforts are recognized by visiting Chinese tourists and figure strongly in their image of SA as a destination.

There is no doubt that South Africa is setting new global standards by ensuring that tourism is economically, environmentally and socially sustainable. There is also no doubt that, as a preferred travel destination, South Africa is becoming increasingly globally competitive and a force to be reckoned with, particularly in an emerging market like China. In order to achieve more, the image of South Africa among visiting Chinese tourists should be under consideration by DMOs when implementing any marketing strategy in destination positioning. There is dearly enormous potential in China if SA succeeds in increasing its market share of overseas tourism from present levels of only 0.2% in the world's fastest growing outbound market.

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Appendix 1.

Questionnaire

The information will only serve for academic research purposes and will be kept anonymous and confidential. We need your honest opinion of your visit so we can improve South Africa (the Western Cape) as a destination.

Instructions:

- a) Tick the appropriate items where required using "X";
- b) Some other questions require you to respond by writing a word, sentence/s.

1. Have you ever traveled overseas before visited South Africa?

- Yes Please go to Question 2
No Please go to Question 3

2. Which of the following destinations have you visited before? (Circle appropriate countries)

- | | | | | | |
|-----------------------------|--------------------------|---------------|--------------------------|------------------------|--------------------------|
| Singapore/Malaysia/Thailand | <input type="checkbox"/> | Egypt/Malta | <input type="checkbox"/> | Middle East | <input type="checkbox"/> |
| Japan/Korea | <input type="checkbox"/> | South America | <input type="checkbox"/> | Others, please specify | <input type="checkbox"/> |
| Australia/New Zealand | <input type="checkbox"/> | Canada | <input type="checkbox"/> | _____ | |
| Hong Kong& Macau | <input type="checkbox"/> | USA | <input type="checkbox"/> | | |
| Vietnam/Cambodia/Laos | <input type="checkbox"/> | Europe | <input type="checkbox"/> | | |
| The Philippines/Brunei | <input type="checkbox"/> | | | | |

3. Before you decided to travel to SA on this visit, which other destinations did you consider?

- | | | | | | |
|-----------------------------|--------------------------|---------------|--------------------------|------------------------|--------------------------|
| Singapore/Malaysia/Thailand | <input type="checkbox"/> | Egypt/Malta | <input type="checkbox"/> | Middle East | <input type="checkbox"/> |
| Japan/Korea | <input type="checkbox"/> | South America | <input type="checkbox"/> | Others, please specify | <input type="checkbox"/> |
| Australia/New Zealand | <input type="checkbox"/> | Canada | <input type="checkbox"/> | _____ | |
| Hong Kong& Macau | <input type="checkbox"/> | USA | <input type="checkbox"/> | | |
| Vietnam/Cambodia/Laos | <input type="checkbox"/> | Europe | <input type="checkbox"/> | | |
| The Philippines/Brunei | <input type="checkbox"/> | | | | |

4. What were your main reasons for choosing to come to SA instead of other country?

- a) _____ b) _____

5. Is this your first time visit South Africa? Yes No

6. During this visit

- a) How many days have you been in South Africa so far? _____
- b) How many days will you spend in SA in total? _____
- c) How many days will you spend in the Western Cape/Cape Town area? _____

7. How many times have you visit South Africa before this visit?

1	2	3	4	5	or more
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8. The MAIN purpose for my present visit to SA is

- a) Visiting friends and relatives
- b) General holiday
- c) Business /professional reasons
- d) Convention/ conference/exhibition
- e) Health treatment
- f) Shopping

g) Gambling

h) Other (please specify) _____

Personal information

9. Are you ? Male Female
10. Age group ? Under 18 24-34 45-54 65 +
 18-24 35-44 55-64
11. Education ? Matric Diploma
 B.Degree Honour Degree
 Master Degree or higher
12. Income ? (Per month)
 Less than US \$ 1 000 US \$ 1 000- 2 500
 US \$ 2 500- 5 000 US \$ 5 000- 7 500
 US \$ 7 500- 10 000 above US \$ 10 000
13. Occupation ? Owner /self-employed white collar/clerk
 Professional/Technical Blue collar/Worker
 Management position Housewife
 Government Official Retired
 Student Others
14. Marital Status? Never Married Married
 Divorced Widow/er

15. Travel Motivation

I travel to South Africa (Cape Town area/region) because /or the attraction of -----
 (1—strongly disagree 2---disagree 3---neutral 4—agree 5--- strongly agree)

South Africa

Cape Town

- a. To see the country after political change (Mandela Image)
- b. To increase my knowledge of SA and its people
- c. To know new, different places
- d. To experience a different life style, customs and culture
- e. To visit historical attractions
- f. To enjoy shopping, entertainment and different cuisine
- g. To visit friends or relatives
- h. To fulfill dream of “Africa”
- i. For business travel /or seeking business opportunity-
- j. To alleviate stress and tension
- k. To escape daily routine
- l. To attend culture events
- m. To go to places that friends have not visited
- n. For rest and relaxation
- o. To seek adventure and pleasure
- p. To participate in sports (river rafting, hiking, skiing)
- q. For Gambling / Sun City
- r. Travel agent promotion (good package)
- s. Intellectual improvement
- t. Seek diversion and entertainment
- u. To do exciting things

a	1	2	3	4	5
b	1	2	3	4	5
c	1	2	3	4	5
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1	2	3	4	5

17. From which of the following sources did you get information about SA?

- a. TV programme about SA about wildlife
- b. Advertisements in a magazine travel brochures
- c. Internet SA websites Chinese websites
- d. Friends/relatives
- e. Newspaper articles
- f. Magazine articles
- g. Others, please specify _____

THANK YOU



Appendix 2.

Interview Questions

1. How many tour operators are there in Western Cape doing business with China?
2. Where is the most popular destination/attraction for Chinese tourists in SA/Western Cape?
3. How big is China's outbound market?
4. When is the peak season?
5. What Chinese tourist prefer? New destination or popular destination?
6. Any market strategy develops related to China market up till now?
7. What is the image of South Africa in the eyes' of the Chinese tourists?
8. Do the Chinese tourists know South Africa well?
9. Does the South Africa tourist guide can communicate with Chinese tourists? Any language barriers? If yes, any plans to solve the problems?
10. What kind of motivation do the Chinese tourists have when they tour oversea?
11. Are there any promotion from SA /Western Cape side in China market, e.g. Exhibitions?
12. Does the Chinese tourists are easy to access to travel permit since SA became the Approved Destination Status? Any government 's follows up?