

The Underpinnings for Successful Route Tourism Development in South Africa

By
Marlien Lourens


Dissertation submitted to the University of the Witwatersrand, School of Geography, Archaeology and Environmental Studies in fulfilment of the requirements for the degree of Masters of Tourism.

Johannesburg, July 2007

Declaration

I hereby declare that this dissertation has not been submitted, either in the same or different form, to this or any other university for any degree.

Signature:

A handwritten signature in black ink, consisting of several loops and a long, sweeping stroke that ends in a sharp upward-pointing tail.

Abstract

This study examines the critical success factors of route tourism development. The aim is to provide a set to practical planning guidelines to assist the successful implementation of routes on a local level. Lessons are drawn from case studies of the Camino de Santiago in Spain, the heritage trails in Queensland, Australia, Hadrian's Wall in the United Kingdom and of the Midlands Meander in South Africa. Routes are considered important because it demonstrated to be an effective vehicle for local economic development. The evidence of their positive impact on rural economies is confirmed throughout the case studies. It is argued that the successful development of tourism routes is not an exact science and emerging destinations often have many hurdles to overcome. Through an analysis of these four case studies, the study explores the elements of themed routes that constitute successful destinations and highlights the importance of planning, promotion and institutional development.

Preface

The key findings from the research on the international case studies and the Midlands Meander Route have been accepted for publication and are due to appear as an article in the *Development Southern Africa*, 2007, volume 24, No 3.

Acknowledgements

My sincere thanks to Professor Christian Rogerson for mentoring me during his sabbatical and for his invaluable support and guidance while completing this thesis. My appreciation also goes to the Midlands Meander Association and their members for assisting me with my research in their area and sharing their management knowledge and experience. Thanks are also due to Mrs W. Job for the preparation of the maps and diagrams that accompany this document.

Thanks and honour to the Creator of all things, El Shaddai, Yeshua HaMashiach!

Table of Contents

	Page
DECLARATION	I
ABSTRACT.....	II
PREFACE.....	III
ACKNOWLEDGEMENTS	III
TABLE OF CONTENTS.....	IV
LIST OF PLATES.....	VII
LIST OF TABLES.....	VIII
LIST OF FIGURES	IX
LIST OF ACRONYMS AND ABBREVIATIONS	X
1. INTRODUCTION	1
1.1 CONTEXT	1
1.2 THE STUDY OBJECTIVES.....	3
1.3 RESEARCH METHODOLOGY.....	3
1.4 STRUCTURE	6
2. LITERATURE REVIEW OF ROUTES TOURISM PLANNING	7
2.1 DEFINING ROUTES TOURISM.....	7
2.2 THE ECONOMIC IMPORTANCE OF ROUTES TOURISM	9
2.3 ROUTES TOURISM IN AFRICA: OPEN AFRICA	12
2.4 THE MANAGEMENT AND PROMOTION OF TOURISM ROUTES	15
2.5 FUNDING FOR DESTINATION MANAGEMENT ORGANISATIONS	19
2.6 ELEMENTS OF SUCCESSFUL ROUTE TOURISM DEVELOPMENT	20
2.7 CONCLUSION.....	22
3. INTERNATIONAL CASE STUDIES.....	24
3.1 CAMINO DE SANTIAGO.....	24
3.1.1 <i>Background</i>	<i>24</i>
3.1.2 <i>Government Influence – Key Drivers of Tourism Growth.....</i>	<i>28</i>

3.1.3	<i>Santiago de Compostela – The “Anchor Project”: Catalyst for the development of the Camino de Santiago</i>	29
3.1.4	<i>The Role of the Council of Europe</i>	32
3.1.5	<i>Route Infrastructure</i>	35
3.1.6	<i>Promotion of the Camino de Santiago</i>	37
3.1.7	<i>Conclusion & Critical Success Factors</i>	39
3.2	QUEENSLAND HERITAGE TRAILS	40
3.2.1	<i>Background</i>	40
3.2.2	<i>The Drive Tourism Campaign</i>	42
3.2.3	<i>National Branding & Signage</i>	44
3.2.4	<i>The Queensland Heritage Trails Network Programme</i>	47
3.2.5	<i>Institutional Structures</i>	50
3.2.6	<i>Summary & Critical Success Factors</i>	52
3.3	HADRIAN’S WALL	53
3.3.1	<i>Background</i>	53
3.3.2	<i>The Management of Hadrian’s Wall</i>	54
3.3.3	<i>Marketing of Hadrian’s Wall</i>	55
3.3.4	<i>Visitor Demand</i>	56
3.3.5	<i>Tourism Infrastructure Requirements</i>	58
3.3.6	<i>Summary & Critical success factors</i>	61
3.4	CONCLUSION	62
4.	MARKET RESEARCH: THE MIDLANDS MEANDER, SOUTH AFRICA	63
4.1	BACKGROUND AND ORIGIN OF THE MIDLANDS MEANDER	63
4.2	TOURISM PRODUCT SURVEYS	63
4.2.1	<i>Profile of Respondents and Products on Offer</i>	64
4.2.2	<i>Employment</i>	67
4.2.3	<i>Market Demand and Revenue</i>	68
4.2.4	<i>Tourism Markets</i>	71
4.2.5	<i>Impact of the Midlands Meander Association</i>	72
4.3	TOURISM CONSUMER SURVEYS	74
4.3.1	<i>Profile of Consumers on the Midlands Meander Route</i>	74
4.3.2	<i>Experience and Expectations of Visitors to the Midlands Meander</i>	76
4.4	ASSESSMENT OF THE ASSOCIATION	79
4.4.1	<i>Membership & Growth</i>	79
4.4.2	<i>Management Structures</i>	80

	Page
4.4.3 <i>Product Diversification</i>	81
4.4.4 <i>Finances</i>	82
4.4.5 <i>Performance & Achievements of the Midlands Meander</i>	83
4.4.6 <i>Critical Success factors</i>	83
4.5 CONCLUSION	84
5. DISCUSSION AND CONCLUSIONS	85
5.1 ROUTES TOURISM AS TOOL FOR SUSTAINABLE TOURISM	85
5.2 THE CHANGING NATURE OF TOURISM DEMAND	86
5.3 ROUTES AND POVERTY ALLEVIATION	86
5.4 REFLECTING ON ROUTES IN THE DEVELOPED AND DEVELOPING WORLD	87
5.5 SUCCESS FACTORS FOR DEVELOPING TOURISM ROUTES	88
5.6 STEPS TO SUCCESSFUL ROUTE TOURISM DEVELOPMENT	92
REFERENCES	97
ANNEXURE A: RESEARCH QUESTIONNAIRE: ROUTE TOURISM PRODUCTS	105
ANNEXURE B: RESEARCH QUESTIONNAIRE: ROUTE TOURISM CONSUMERS	115
ANNEXURE C: RESEARCH QUESTIONNAIRE: MIDLANDS MEANDER ASSOCIATION	124

List of Plates

	Page
Plate 3.1: The contemporary Camino de Santiago route signage: Holy Year Festivals and Pilgrims on the Route	36
Plate 3.2: Queensland Themed-Route Tourism Signing Scheme.....	45
Plate 3.3: Branding & Attractions of Hadrian's Wall World Heritage Site	55

List of Tables

	Page
Table 3.1: Santiago de Compostela and the Camino: chronology of institutional undertakings and events	30
Table 3.2 : Drive Market Segmentation (Queensland).....	43
Table 3.3: Annual Attendance to Hadrian Wall's Main Sites (2000-2003)	57

List of Figures

	Page
Figure 3.1: The Routes of the Camino de Santiago.....	25
Figure 3.2: Seasonality of Pilgrims to the Camino de Santiago (2004).....	26
Figure 3.3: "Traditional Pilgrim" Visitors since 1998	27
Figure 3.4: Main urban improvements in Santiago de Compostela (1993-2002).....	31
Figure 3.5 : Queensland Heritage Trails – Themed Routes.....	41
Figure 3.6: Institutional Structure of the Australian Tourism Industry.....	50
Figure 3.7: Map of Hadrian’s Wall Heritage Site	53
Figure 3.8: Long-Term Visitor Trends to the Main Attractions of Hadrian’s Wall WHS	58
Figure 3.9: Visual Layout of the Product Development Strategy for Hadrian’s Wall	61
Figure 4.1: Location of Midlands Meander: Original Products in the area in 1987.....	64
Figure 4.2: Respondents in Management Positions	65
Figure 4.3: Range of Tourism Products covered by the Survey	66
Figure 4.4: Period of Operation	67
Figure 4.5: Seasonality of Demand for Midlands Meander Route (percent of Total Demand).....	69
Figure 4.6: Average Number of Visitors Received Annually by Facility Type	70
Figure 4.7: Niche Market Segments on the Meander	71
Figure 4.8: Visitor Profiles: Type and Size of Groups	72
Figure 4.9: Age Profile of Visitors to the Midlands Meander Route	74
Figure 4.10: Origin of Visitors to the Midlands Meander Route	75
Figure 4.11: Monthly Household Income of Visitors to the Midlands Meander	75
Figure 4.12: Expenditure of Domestic and Overseas visitors on the Midlands Meander Route	77
Figure 4.13: Accommodation Used on the Midlands Meander	77
Figure 4.14: Rating of Facilities and Services.....	78
Figure 4.15: Midlands Meander in 2005 with an Extensive Range of Tourism Product along the R103 Route.....	79
Figure 4.16: Breakdown of Tourism Products in the Midlands Meander.....	81
Figure 4.17: Breakdown of Income and Expenditure of the Midlands Meander Association	82
Figure 5.1: Process of Establishing and Positioning of a Route Tourism Destination.....	92

List of Acronyms and Abbreviations

B&B	-	Bed and Breakfast
BTR	-	Bureau of Tourism Research
CBT	-	Community-based tourism
DMO	-	Destination Marketing Organisation
DTB	-	Dolenjska Tourist Board
ERA	-	Economics Research Associates
FRIDGE	-	Fund for Research into Industrial Development, Growth and Equity
GIS	-	Geographical Information Systems
HWT	-	Hadrian's Wall Trust
HWTP	-	Hadrian's Wall Tourism Partnership
LEADER	-	Liaisons Entre Actions de Développement de l'Economie Rurale
MMA	-	Midlands Meander Association
MPC	-	Management Plan Committee
NGO	-	Non-Government Organisation
LTO	-	Local Tourism Organisation
QHTN	-	Queensland Heritage Trails Network
QHT	-	Queensland Heritage Trails
RTO	-	Regional Tourism Organisation
SDTA	-	South Downs Tourism Association
SRB	-	Single Regeneration Budget
UNESCO	-	United Nations Educational, Scientific and Cultural Organisation
UNWTO	-	United Nations World Tourism Organisation
WHS	-	World Heritage Site
WTTC	-	World Travel and Tourism Council

CHAPTER 1: INTRODUCTION

1.1 CONTEXT

Some observers describe the notion of 'route development' as the world's best hope to secure sustainability in travel and tourism (ECI Africa, 2006). The concept of tourism routes refers to an "initiative to bring together a variety of activities and attractions under a unified theme and thus stimulate entrepreneurial opportunity through the development of ancillary products and services" (Grefe, 1994). Route tourism is thus a market-driven approach for tourism destination development.

In several parts of the world, the concept of rural trails or heritage routes has been used, particularly in the context of promoting rural tourism (Telfer, 2001a, 2001b; Meyer-Cech, 2003, 2005). According to Meyer (2004), routes seem to be a particularly good opportunity for the development of less mature areas with high cultural resources that appeal to special interest tourists, who often, not only stay longer, but also spend more to pursue their particular interest. Routes appeal to a great variety of users such as overnight visitors that visit the route as part of a special interest holiday or day visitors that frequent the route (or part of it) on excursions. The essential concept of route tourism is simple, namely that of the linking together a series of tourism attractions in order to promote local tourism by encouraging visitors to travel from one location to another. The characteristics of routes can vary considerably in terms of length and scale, themes and visitors attracted (Meyer, 2004). The development of tourism routes offers opportunities for the formation of local development partnerships. Some of the best and most successful examples of such 'rural routes' are the development of wine or food circuits, which have been widely researched in Europe, North America and Australasia (Telfer, 2001a, 2001b; Hall *et al*, 2003; Meyer-Cech, 2003; Telfer and Hashimoto, 2003).

In present-day South Africa, considerable activity also surrounds the development of 'route tourism', involving a linkage together of the tourism resources of a number of smaller centres and collectively marketing them as a single tourism destination region (Rogerson, 2002a, 2002b; Briedenhann and Wickens, 2004; Rogerson, 2004). For many South African small towns, route tourism is a vital component of local economic development, as is shown by Donaldson (2007). The development of wine routes as part of the strong and growing interest in special interest, wine tourism represents one of the most well-known examples

(Preston-Whyte, 2000; Bruwer, 2003). The highly profiled and ambitious route tourism initiative is the activities of the African Dream Project, organised by the Open Africa Foundation, which seeks to link the splendours of Africa in a continuous network of Africa tourism routes, from the Cape to Cairo (Visser, 2004). The South African-based NGO – Open Africa – has, with the use of donor funds, developed 59 routes in four African countries since 1999. Open Africa aims to create routes that directly contribute to the alleviation of poverty in Africa's rural and marginalised areas while celebrating and fostering African culture and promoting nature conservation (Visser, 2004). However, there is very little supportive information about the role that routes play in the alleviation of poverty in local communities. Although the routes development concept by Open Africa is a positive marketing tool for many community tourism products, it is argued that few of the routes are successful in terms of growing the number of tourism products and demand (HSRC, 2006).

Tourism is an important economic sector in Africa within more than half of Sub-Saharan Africa countries (Ashley and Mitchell, 2006). The possibilities of tourism are of growing interest to governments and donor organisations in respect of poverty alleviation. Indeed it is regarded significant that the South African Government's Trade and Industry Chamber, through its Fund for Research into Industrial Development, Growth and Equity (FRIDGE) commissioned the development of a strategic plan for routes and community-based tourism in 2005 (ECI Africa, 2006). The works of *Pro-poor Tourism in Practice* (2004a and 2004b) explores opportunities for the involvement of poor communities in Africa through the development of route tourism. Rogerson (2002a, 2007) also highlights the important role that route tourism can play in local economic development in South Africa.

In common with the international experience, in South Africa it can be argued that there are considerable research gaps regarding the changing nature of the market for routes tourism, the needs and motivations of visitor markets, awareness of tourism routes and whether visitors rate touring routes as attractions in their own right or as a means to reach an end destination (Meyer, 2004; Donaldson, 2007). In addition, best practice on route tourism development and marketing experience from both overseas and South Africa is not being documented or shared between local stakeholders.

Poor knowledge of the characteristics and needs of markets can lead to poor community investment decisions, destination and route planning (Meyer, 2004). It is against this background that the aim of this study is to identify the critical success factors in the development of tourism routes. A key output of the study is to provide a set of practical planning guidelines for the application of the route concept in local destinations. The study will analyse a series of international and local case studies to identify the success factors central to route destinations. Three international and one local case study were selected for analysis: The Camino de Santiago in Spain; Queensland Heritage Trails in Australia;

Hadrian's Wall in the United Kingdom; and the Midlands Meander in South Africa. These destinations were selected because of their recognised achievements in attracting large volumes of visitors and their significant contribution to local economies. Using these case studies, the study explores the elements of themed routes that constitute successful destinations and highlights the planning aspects of critical importance.

1.2 THE STUDY OBJECTIVES

South Africa has rich cultural and heritage resources, yet the country is unable to effectively preserve and turn these assets into tourist attractions that earn revenue and create employment. Even though there is some existing literature on routes tourism development (see Rogerson, 2002a, 2002b, 2004 and 2007; Visser, 2004; Donaldson, 2007) there is no "how to" manual explaining the steps that should be followed when developing a route.

The overall objective of this study is to develop a comprehensive set of practical guidelines on route tourism development to support the successful implementation of this concept at a local level. In order to achieve this, the dissertation is divided into three parts. The first part is the literature review of which the aim is to investigate the scholarship on planning and route tourism development. The second part is an international case study analysis of successful routes in Europe and Australia. The third component comprises primary research of products and consumers within a successful local destination in South Africa, the Midlands Meander. The in-depth research of the performance of tourism products within tourism routes aims to gain a better understanding of the impact, drivers, challenges and potential of route tourism in local economies. In addition, the consumer research seeks to identify the best infrastructure, information and marketing practices that can be shared among routes.

1.3 RESEARCH METHODOLOGY

The research methodology consists of a literature review and series of interviews with different sources namely:

- International case study research;
- Local (South African) case study research on the role of the Midland Meander Association in the region; and
- Detailed Product and consumer research interviews in the Midlands Meander, South Africa.

The findings of the research culminate into the planning guidelines for successful routes tourism development in South Africa in Chapter 5.

International Case Study Research

The international case studies for the dissertation are:

- The Camino de Santiago in Spain;
- Queensland Heritage Trails in Australia; and
- Hadrian's Wall in the United Kingdom.

These case studies were chosen specifically to highlight aspects of planning and route tourism that are particularly weak in the South African environment. The first case of the Camino de Santiago route was chosen because of its strong cultural focus and because of its origins in the public sector. The models and strategic thinking behind the development of the Camino de Santiago offer important knowledge in developing growth strategies for local economic development.

The second case of the Queensland Heritage Trails was chosen for its involvement of marginalised communities on routes. Tourism in the Queensland area has, and still plays, a major role in the transformation of local economies. The process was also started by funded government programmes aimed at cultural preservation.

Finally the destination of Hadrian's Wall was chosen as a case study to demonstrate how a diverse group of stakeholders can be brought together and constructively manage a tourism destination that crosses several municipal boundaries.

The international case study research allows the identification of critical success factors for each of the selected destinations. The differences and/or similarities between the destinations in respect of product development, key pull factors, institutional structures and marketing support from public sector bodies are discussed. Overall, the three international case studies explore the elements of themed routes that constitute successful destinations from a planning and management perspective.

In-depth Local Case Study Research

Primary research was conducted of the products and consumers in the Midlands Meander in South Africa. The purpose of the surveys on the Midlands Meander route was to gain a better understanding of the dynamics playing a role in the success of route destinations.

A list of all tourism products was obtained from the Midlands Meander Association (MMA), which currently has 229 members. A total of 40 tourism products was randomly selected for interviews across all types of products from accommodation, arts and craft shops, attractions and food and beverage outlets. The survey aimed to establish the following:

- Average size of enterprises on routes;
- Performance (occupancies, rates achieved);
- markets attracted;
- method of transport used;
- membership to local tourism organisations (perception of value);
- marketing channels used (reliance on collective marketing initiatives);
- average number of people employed by tourism enterprises on routes; and
- key factors for achieving successes and/or failures.

The survey of product suppliers was undertaken between October 2006 and July 2007.

On the consumer side, personal interviews with 38 local and international visitors to the Midlands Meander route were conducted. The visitors were selected randomly at key visitor attractions on the Meander over the interview period during December 2006. The survey included quantitative and qualitative surveys to determine the following:

- Visitor profile (age groups, families, method of transport and income levels);
- Special interests and pursuits;
- Purpose of visit;
- Tourism products purchased;
- Advertising media used;
- Awareness of the Midlands Meander as a route destination;
- Current experiences purchased and level of satisfaction;
- Expectations of route destinations;
- Awareness and visitation to other routes in South Africa;
- Reason for visit and its attractiveness;
- Length of stay and expenditure; and
- Frequency of visit.

In addition to the consumer and product surveys a detailed discussion with the management of the Midlands Meander Association was conducted. The purpose of this interview was to establish the role of the association in the success of the region and how it is managed to become a sustainable management organisation with full time staff. This survey contained mostly qualitative information with a few quantitative questions on membership numbers, fees and finances.

After the completion of all surveys, the data was coded and captured by means of using Microsoft Excel. The interviews included a range of different types of questions namely open-ended, multiple choice and Likert scales (Patton, 1990). Copies of the consumer, product and association survey questionnaires are attached in Annexures A, B and C.

The objective of the research was to produce key planning guidelines that can be used by destination management organisations to address the differences between consumer expectations and product offering in routes destinations.

1.4 STRUCTURE

Following on from this introduction, Chapter Two provides a literature review on the planning aspects of routes tourism. This chapter looks at a variety of planning and developmental issues and compares the success rates of international and local routes.

Chapter Three investigates the key success factors of route tourism from an international perspective. The chapter identifies commonalities between international routes in respect of management structures, funding requirements, marketing efforts and key source markets.

Chapter Four contains an analysis of the primary research conducted in the Midlands Meander Route. This detailed investigation on a successful local route, reveals the fabric of a mature private sector driven destination. The dissertation closes with final conclusions in Chapter Five which offers practical guidelines for route tourism planning. The guidelines represent an assimilation of the best practice between local and international routes.

CHAPTER 2:

LITERATURE REVIEW OF ROUTES TOURISM PLANNING

Chapter Two provides a literature review on routes tourism from an international and southern African perspective. Overall, the aim in this chapter is to draw upon “good practice” on route tourism development and identify the key success factors and pitfalls documented by experts on the subject of route tourism development.

2.1 DEFINING ROUTES TOURISM

Tourism routes bring together a variety of activities and attractions under a unified theme and thus stimulate entrepreneurial opportunity through the development of ancillary products and services (Miossec, 1977; Gunn, 1979; Long *et al*, 1990; Fagence, 1991; Lew, 1991; Greffe, 1994; Page and Getz, 1997). In essence the tourism route concept is seen as a very effective method of tourism distribution, especially of tourists travelling by road (driving, hiking and cycling) within a given geographic area.

According to Meyer (2004), in general, routes are initiated with one or more of the following objectives in mind:

- To diffuse visitors and disperse income from tourism;
- To bring lesser-known attractions and features into the tourism business/products;
- To increase the overall appeal of a destination;
- To increase length of stay and spending by tourists;
- To attract new tourists and to attract repeat visitors; and
- To increase the sustainability of the tourism product (Meyer, 2004).

Routes tourism, in particular those with specific themes such as birding, wine, and arts and crafts, may therefore be seen as a market-driven approach by which a “local community tourism product” within a particular destination is defined and packaged to be attractive to tourism markets (ECI Africa, 2006). These may include a range of niches depending on the unique selling features and related product offerings within the destination (see Donaldson, 2007). The linkage of tourism with other sectors unlocks opportunities for both sectors. As

illustrated by Nowers, de Villiers and Myburgh (2002), the wine routes of the Western Cape provide opportunities to improve the quality of life of those in the agricultural and tourism sectors. According to Meyer (2004) the wine routes in South Africa are considered very successful and are primarily directed at day-tripping tourists with the objective to increase sales and promotion of wine. Such routes are product orientated and currently offer little opportunities for linkages with non-wine suppliers (Meyer, 2004).

Meyer (2004) states that the attractiveness of any route is its perceived “distance” in terms of the following:

- Geographical distance between the generating region and the tourism destination. This means the actual travel distance. The willingness of the tourist to cover this distance might be considerably different for various segments and is determined by the “appeal” and attractiveness of the product;
- Travel time needed to cover the geographical distance. This is the possibility to cover the distance as part of a “day-tripping” excursion, or conversely the need to plan a longer trip and design a route that has sufficient attractions to appeal to longer-staying visitors;
- Amount of money needed by the tourist to cover the distance. This refers to how much a market segment is willing to spend on reaching and travelling the route. It depends whether the route offer value for money and if there are there sufficient attractions that would entice visitation; and
- Cognitive distance between the generating region and the destination. This is the perception of travel with regard to the tourism product and route as being similar or distant to the home environment (Meyer, 2004).

The recent study by ECI Africa (2006) on routes and community-based tourism states that routes are developed across the globe on various scales such as across countries as in the examples of the Silk Routes in Eastern Europe and the Camino de Santiago in Western Europe. Terminology used to describe the concept also varies greatly such as “themed routes”, “trails” and “tourism byways”. Trails usually refer to the concept on a smaller geographical scale, which indicates the ability of visitors to engage in the attraction on foot, bicycle, or horseback (ECI Africa, 2006). In Australia and the United States, the route concept is linked to a market-driven term called “drive tourism” (see Eby and Molnar, 2002; ECI Africa, 2006). “Drive tourism” is used to encourage visitation to attractions that are dispersed over larger distances, hereby making rural destinations more attractive to self-drive tourists (for example the Queensland Heritage Trails in Australia – see Chapter Three).

Rogerson (2004a, 2007) argues that routes can either be “product” or “theme” based. Examples of these are routes that have a strong product focus such as the Waterloo-

Wellington Beer Trail in Canada (Plummer *et al*, 2005, 2006), the Niagara Wine Route (Telfer, 2001a, 2001b) or Food Trails, such as Cheese Trail Bregenzerwald in Austria (Meyer-Cech, 2005) and the food trails around Niagara in Canada (Telfer and Hashimoto, 2003), which are generally developed to increase marketing and sales of the core product. By contrast, other routes are used to project a unified image of a region in terms of a theme (Rogerson, 2007). This means that, not only is the route itself themed, but also everything that is supplied as part of that route (such as accommodation, shopping and catering). One of the best examples of this genre of 'themeing' is the Mozart Route in Austria (Meyer, 2004).

2.2 THE ECONOMIC IMPORTANCE OF ROUTES TOURISM

Tourism is becoming an increasingly important economic sector for developing countries. According to Pro-poor Tourism in Practice (2004a), the absolute tourism earnings of developing countries grew by 133 percent between 1990 and 2000 and in the least developed countries by 154 percent, as compared with 64 percent for OECD (Organisation for Economic and Cooperative Development) countries and 49 percent for EU countries. According to the World Bank's World Development Indicators (2004), tourism is an important economic activity in 70 percent of developing countries. In 28 of the 49 Sub-Saharan African countries, tourism contributes more than 3 percent of gross domestic product (GDP). The potential to utilise tourism as a tool for sustained socio-economic development as well as the redistribution of developed-country wealth is obvious, yet somehow elusive (Harrison, 1994).

According to Meyer (2004) tourism routes have, in the past two decades, proliferated all over the world, in particular in the developed world. This is because they offer important dispersal and product development opportunities, and at the same time, fall in line with visitors who increasingly want to experience new things. Routes seem to be a particularly good opportunity for less mature areas with high cultural resources that appeal to special interest tourists, who often not only stay longer, but also spend more to pursue their particular interest (Meyer, 2004).

Pro-poor Tourism in Practice (2004b) explores opportunities for the involvement of poor communities in Africa through the development of route tourism. They argue that a new route can lead to the development of local enterprises, increasing the demand for goods and services of the poor and contribute to much needed employment. However, Meyer (2004) indicates that it is essential for new excursions and routes to link in with traditional tourism structures and extend them to incorporate new features, new products and new stakeholders in order for them to be commercially viable, which is essential if the poor are to benefit.

Over the past 20 years, route tourism has started to become a viable tourism product option due to the changing needs in global tourism demand. During this time, tourism has not only seen significant growth but has also shown a continued diversification. For many years international tourism has been characterised by its concentration in space (coastal areas, lakes and watercourses) and in time (summer) and in terms of motivation (rest, relaxation and leisure, closely linked with sun and beach holidays) (UNWTO, 2001). But, it is recognised that there is a growing tendency in tourism markets for change. The market is providing new national destinations and emerging destinations in each country with increasingly more opportunities. The staggering element of holidays, the complex requirements of tourists and the improvement of the conditions that foster tourism development are clearly contributing to this process (UNWTO, 2001).

Since the 1990s, evolving tourism trends have led to a shift away from standardised mass tourism to more individualistic patterns in which greater flexibility and a more meaningful experience have gained prominence (Hummelbrunner and Miglbauer, 1994). It is argued that rural tourists, in particular, have a wide range of motivations, from ecological uniqueness, special adventure opportunities, cultural attractions or the peace and quiet of the countryside (Hummelbrunner and Miglbauer, 1994). Greffe (1994) suggests that this provides a unique opportunity for rural operators in terms of “economies of scale” by establishing networks of different service providers, organised in such a way as to maximise opportunity, and to offer a wide range of products and activities. For suppliers of rural tourism this emphasises the significance of the development of a product that attracts, satisfies and retains the market (Poon, 1989; Greffe, 1994; Hummelbrunner and Miglbauer, 1994).

The potential of tourism routes has long been realised in the developed world. As discussed in the case studies in Chapter Three, the Council of Europe established a working group as far back as 1964 with the idea of establishing a series of European cultural routes with the prime objective of raising awareness of European culture and improving the quality of life through developing existing themes into more attractive travel destinations. In Eastern Europe, where events of the last decade have triggered a rapid rise in rural unemployment, tourism has been identified as a catalyst to stimulate economic growth, increase the viability of underdeveloped regions and improve the standard of living of local communities (Ratz and Puczko, 1998; Briedenhann and Wickens, 2004). The economic impact of tourism routes in Europe has been significant. One of the most famous routes funded by the Council of Europe, the Camino de Santiago, is generating an estimated € 4,7 billion per annum for the Galicia region of northern Spain (TurGalicia, 2005).

Even though these figures may sound impressive, mentioned less frequently, however, is tourism’s increasing role as an international agent of social and ecological change, with both desirable and undesirable consequences (Potts and Harril, 1998). Critics of this emerging

economy argue that “the process of closer international integration has reinforced existing disparities in the economic performance of groups in developing countries” (Cook and Kirkpatrick, 1997:3).

According to Briedenhann and Wiekens (2004), tourism is perceived to be one of the few feasible options for development in less-developed countries of sub-Saharan Africa that are afflicted by debilitating rural poverty. But compelled by the pressures of restructuring, and driven by demands for economic growth and job creation, governments in developing countries frequently fall prey to the dangers of random, *ad hoc* development, without due regard to the economic and cultural well-being of rural communities, the conservation of the environment or the inclusion of local residents in decision-making (Haywood, 1988; Long, Perdue and Allen, 1990; Prentice, 1993).

Ioannides (1995:11) observed that, “Even though tourism’s earnings may be considerable in less developed countries, the excessive leakages arising from a small elite class substantially lessen the industry’s benefits in the local community at large”. Neither sustainable tourism nor “sustainable community tourism development” adequately addresses planning for community tourism within an integrating global economy and the gross social and political inequities resulting from this integration.

While the potential for the development of tourism in South Africa is recognised, growth of the industry is constrained by a variety of factors (ECI Africa, 2006). A study, undertaken on behalf of the government in 1999, stated that South Africa could only hope to develop holistic, integrated strategies for tourism development if the various tiers of government, tourism agencies and private-sector organisations are able to clearly define their roles and neutralise the current rivalry existing between them (The Cluster Consortium, 1999). Driven by demands for economic growth and job creation and bound by restructuring, governments in developing countries however frequently fall prey to the dangers of random, *ad hoc* development, without due regard to the economic and cultural well-being of rural communities, the conservation of the environment or the inclusion of local residents in decision-making (Getz, 1983; Evans & Ibery, 1989; Long, Perdue and Allen, 1990; Britton, 1991; Deroi, 1991; Marsden, 1992; Prentice, 1993; Hill and Gibbons, 1994; Briedenhann and Wiekens, 2004).

Routes do not always have to rely on Government or donor support. They can also be developed by the private sector as in the case of the Midlands Meander in South Africa. This route started small and grew organically into a sustainable rural industry as discussed in Chapter Four. The route is privately managed by an association providing various economic benefits to its members. However, there are very few private sector routes in South Africa that are considered successful. Open Africa, a donor-funded organisation, makes use of

funding to assist local communities to develop tourism routes. Their achievements and challenges are discussed in the following sections.

2.3 ROUTES TOURISM IN AFRICA: OPEN AFRICA

One of the most significant efforts to develop tourism routes in Africa is the Open Africa initiative (Briedenhann and Wickens, 2004; Visser, 2004). Open Africa was established in 1993 as an NGO with the broad mission to elevate African values, pride and prosperity – based on respectful, restorative, sustainable, and profitable use of the unique qualities of Africa’s human and natural environment (De Villiers, 2000). The basic underlying principle is a route system spanning from the Cape to Cairo (Visser, 2004). The simple reason according to De Villiers (2000:14) was that “route networking is the easiest way of planning and the most effective way of selling tourism, while it also has many benefits for tourists”. The three objectives of Open Africa are:

- To stimulate the development of “Afrikatourism” Routes;
- To gather information on “Afrikatourism” resources; and
- To disseminate information on “Afrikatourism” to potential participants and consumers (De Villiers, 2000).

The first route publicised by Open Africa in 1999 was the Fynbos Route near Stanford in the Western Cape of South Africa. This route has acted as a model framework for further route development in line with Open Africa’s ideals and priorities (Meyer, 2004). Meyer (2004) continues to say that although the concept of a tourism route is not unique, the African Dream Project is innovative. The Open Africa Foundation was set up by scientists, tourism experts and business people with the aim of “optimising tourism, job creation and conservation in Africa” (Open Africa, 2002). The vision is to “turn Africa’s natural and cultural resources into one of the most valuable products on earth, based on the business principle of supply and demand which dictates that whatever is rare is valuable (Meyer, 2004). The aim is to link the splendour of Africa in a continuous network of Africa tourism routes from the Cape to Cairo” (Open Africa, 2002). According to Visser (2004) the development of Open Africa was enabled by the integration of GIS (Geographical Information Systems) technology with the internet. It is argued that this approach to tourism development is unique and represents a world first for Africa (Visser, 2004).

Open Africa’s aim is to create routes that directly contribute to the alleviation of poverty in Africa’s rural and marginalised areas while celebrating and fostering African culture and promoting nature conservation (Open Africa, 2002). South Africa has, in recent years, seen an immense revitalisation of cultural festivals and ceremonies that were long dormant, and it

is expected that these routes will play an important part in using this revitalisation for the generation of economic benefits as well as pride (Open Africa, 2002).

According to a report by the HSRC (Human Science Research Council) (2006), the Open Africa network currently comprises 60 routes, covering 32 952 km in six countries, involving 203 features and 1 671 business establishments that support 13 248 direct full-time and 5 602 part-time jobs in more than 200 towns and villages. This is on average about 28 tourism establishments and 220 full time employees per route.

Only five Open Africa routes are located outside South Africa (one in Namibia, two in Mozambique, one in Swaziland, one in Zambia, and one shared between South Africa and Lesotho). Moreover, fourteen are 'information' routes (developed by the Open Africa staff, assembling map and other information) that do not involve community-based processes or actual participants. Community-based routes in South Africa total 41 (HSRC, 2006).

The investigation by HSRC (2006) indicates that the Open Africa model of route establishment is basically a process where Open Africa staff members facilitate a series of three workshops, in which participants contribute ideas about the route's attractions and decide on a name and marketing angle for the route. Each route is then managed by a 'Route Forum', composed by these participants, who represent established local businesses as well as aspiring entrepreneurs and artisans. The forums thereby bring informal and start-up/ micro-enterprises, such as bed & breakfast establishments and craft artisans, into structured cooperation with more established businesses, such as lodges and restaurants that have better business experience, skills and contacts. The model is uniquely inclusive in incorporating individuals (like very poor residents of an area) who would normally be excluded, through lack of capital and experience, from regional tourism development (HSRC, 2006).

The 'Route Forum' supposedly cooperates to direct tourist arrivals and trade to the entire route, creating mutual benefits and allowing start-up/micro-enterprises to integrate and promote their services in ways that would otherwise be beyond their reach. Most Open Africa routes are 'pro-poor', which means that they include people who would otherwise not have access to tourism revenue except through unskilled labour (HSRC, 2006).

According to HSRC (2006) each route costs R177,000 to establish and will in future cost R230,000 (the increase will enhance Open Africa marketing). The costs include initial travel, photography, printing of publicity materials, and website development, and salaries and expenses for Open Africa staff. The figure of R177,000 is not the actual cost of a route, but is calculated by dividing Open Africa's annual expenses by the number of routes established. The amount for the establishment of routes increased significantly between 2004 and 2006.

As indicated by Visser (2004) the cost per route was R100 000 in 2004. The Open Africa method of costing seeks to avoid donor or institutional bias against routes that are more costly and troublesome to establish, such as those in more remote areas (HSRC, 2006). In exchange, Open Africa offers local communities a network among existing and aspiring enterprises and individual crafters and artisans. Open Africa also combines GIS technology with Internet-based marketing via its website, which provides tourists with easily accessible maps and information on its routes (HSRC, 2006). However, the destinations are not marketed individually or uniquely. All the routes are marketed collectively via one website with one theme: “the African Dream” (www.africandream.com).

Even though the routes development concept by Open Africa is a very positive marketing tool for many communities with tourism products it is observed that the programme creates a two-fold problem; firstly, expectations are raised within communities in respect of the route concept being a panacea for growing tourism demand, while there is no support for individual enterprises in terms of destination management, quality assurance, skills development, lack of connection between e-marketing activities and products on the ground and general tourism infrastructure (including organisational). Moreover, from a market perspective, expectations are unfulfilled at consumer level (ECI Africa, 2006).

A very good example of the internal issues encountered is the Ribolla Route which was investigated by the HSRC (2006). The route was established in 2004 and is located along roads between Elim and Thohoyandou, in the former Venda region of the northeast Limpopo Province. The report states categorically that “the Ribolla Route Forum had failed to form: it had, indeed, never met after the initial three Open Africa workshops in 2004”. Supposed ‘participants’ interviewed as part of the study by HSRC (2006) had not even heard of a forum. Open Africa considers that the Ribolla Route Forum has ‘lapsed’, but it appears never to have functioned at all. It is evident from the HSRC (2006) study, that the key reason for the failure of the route is the loss of leadership and management during the early stages of the formation of the route. The “ownership” of the route was transferred to local lodge owners who seem to think that the route has in some way contributed to the general awareness of the region (HSRC, 2006). Visser (2004) flagged the lack of participation of communities as one of the “generic” problems inherent to Open Africa.

The “Afrikatourism” concept received much criticism by the industry in respect of raising expectations of communities without linking them into the tourism chain, which results in poor visitation of routes. The managers of programmes such as Open Africa admit that support required by communities with the desire to develop a route within their area is immense and remains one of the major challenges that would have to be overcome to achieve successful routes tourism in South Africa (Briedenhann and Wickens, 2004).

According to the HSRC (2006) Open Africa's own assessment of its projects indicates a very mixed picture. Of 38 projects listed by Open Africa in a private communication to HSRC, only eight routes are described as 'strong' or 'flourishing'. HSRC (2006) continues to state that only one was described as truly 'unsuccessful', but several others are difficult to distinguish from 'unsuccessful': five have effectively 'collapsed' or are 'very close to zero' (including Ribolla, which never held a forum meeting). Sixteen are described as being in various states of trouble (for example 'weak', experiencing a 'slow start', or needing 'attention', 'revival', or 'resuscitation'). Crippling problems with the chairperson (personality conflicts, resignation, or legal trouble) have afflicted four routes, HSRC (2006).

The problems encountered by Open Africa are not unique and are well-illustrated by Meyer (2004) in the investigation of the Kabaka's Heritage Trail in Uganda. The issues encountered in Uganda covers almost every aspect of route tourism development. According to Meyer (2004) the main obstacles in the Ugandan context emerged as the following:

- Low level of development and lack of skills and experience at community level;
- the formation of the community associations, their business planning, product development and marketing training were time consuming;
- The lack of support infrastructure and services such as telephones and access to credit posed a challenge for building product quality;
- Limited international and domestic tourism markets in Uganda and constraints of the industry to grow international arrivals;
- Delays and dependence on external funding further exacerbated problems (Meyer, 2004).

Although there is a realisation of tourism assets, skills within rural and sometimes urban communities are not sufficient to cover all areas of route or destination development. Besides skill shortages, tourism associations face financial challenges due to poor performance of local tourism businesses, lack of cohesion and support of all stakeholders leading to weak organisations unable to effectively manage the destination or route (ECI Africa, 2006).

2.4 THE MANAGEMENT AND PROMOTION OF TOURISM ROUTES

Adequate information and marketing promotion of any route tourism initiative is an essential underpinning for successful route tourism (ECI Africa, 2006). The international experience contains many examples of the setting of routes or trails designed to attract day visitors and

tourists and failing because of the inadequate provision of information or of the lack of any publicity concerning these routes (Meyer, 2004).

It is argued that “successful promotional practices, like the more general marketing practices, are those tools that effectively ensure or create a stable tourist demand while meeting, and not overburdening, current resource supply” (Meyer, 2004:25). The responsible organisation for regional promotion can vary from case to case; in some examples it is the private sector, in other cases the public sector through local government tourism initiatives becomes involved. It is essential that whatever agency takes responsibility for marketing ensures that the promotion is an accurate and true representation of the tourism product as it exists in reality.

According to ECI Africa (2006), the management and marketing of routes is usually done through private-sector tourism associations supported by local, regional or state authorities, depending on the scale and significance of the route. The successful establishment of routes require an understanding of the following aspects:

- Area leadership dynamics;
- Tourism assets (mostly natural and cultural heritage);
- Area carrying capacity and infrastructure requirements;
- Physical planning;
- Market analysis;
- Creation of local institutions;
- Promotion and interpretation; and
- Tourism quality standards, (ECI Africa, 2006).

According to the Manual on Heritage Trails by Goodey (1997), the benefits of creating an association or legal entity responsible for the management of routes or destinations are many and varied. Obvious benefits may be achieved through:

- Pooling of resources;
- Providing a focal point for local attractions, small villages and services which are widely distributed and could not justify the resources to sell themselves individually;
- Providing economies of scale to the spending of technical, financial and human resources;
- Creating an identity for the area outside of politics; and
- Facilitating a community bond where all can reap the rewards by contributing in some way or other (Goodey, 1997).

The aim of a tourism or marketing association is solely dependent on the desires of the local community. The proviso is, however, that it must be properly resourced in order to achieve the agreed objectives set out in the plan. During the beginning years, the success of the organisation is almost solely dependent on strong leadership and vision to carry the initiative forward. Contributions in terms of finances and other resources must be realistic and relative to the expectations of the community. An important success factor is that, whatever the final institutional framework, solid long-term backing and commitment from members is a pre-requisite. The balance of power and influence must be spread amongst the executive members in order to prevent internal rivalry (Goodey, 1997).

Case studies in other developing countries outside of Africa show that lack of experience does not necessarily constitute a drawback in creating the association, other than the time necessary to find the most effective institutional framework. Exploring these alternatives, the following discussion examines the different cases of Bulgaria and Slovenia. In the course of building the heritage trails tourism associations in Bulgaria and Slovenia, there were a ready source of enthusiastic and entrepreneurial individuals willing to participate. There was little or no experience, though, in the two most important functions of the association – tourism marketing and sourcing of funding for this work (Goodey, 1997).

The Dobroudja region of northern Bulgaria had no base on which to build an association to take care of the heritage trail development and marketing. The region has little, if any, history of tourism development other than that which is a legacy of the former communist regime or that which has developed only in recent years. Historically the Dobroudja region has been predominantly rural and agricultural and it had not been marketed as a tourist destination. There was no local tourist council or board and no evidence of any planning skills in tourism marketing (Goodey, 1997).

Despite the lack of infrastructure, there was a pool of entrepreneurial and technical skills in the areas of preservation of natural, cultural and archaeological heritage. The enthusiasm from this pool was the springboard for both the development of the Dobroudja Heritage Trail Marketing Association and the source of staffing. The association was constructed by the creation of a working group of the various concerned individuals. One of the municipalities offered to house the association along with the provision and payment for shared secretarial and administrative support. The newness of the concept of regional tourism marketing and the complexities of local politics mean that this process is an ongoing and evolutionary one. The signs are, however that the original concept will be workable in time, with dedication and ongoing commitment by the municipalities and the close cooperation of the association members (Goodey, 1997).

Funding proved to be a major hurdle, both for the production of a brochure and for the ongoing operational costs of the association. Funding for the brochure was found through the national Tourism Development Programme fund for product development. The heritage trail brochure has now become part of the new portfolio of brochures being produced for Bulgaria as a whole. Funding for operational costs of the marketing programme are sought from both municipal and private-sector tourism outlets of the region (Goodey, 1997).

In the case of the Dolenjska - Bela Krajina heritage trail in Slovenia, the only existing organisation connected with tourism for the regions was the Dolenjska Tourist Board (DTB). The DTB is constituted, primarily, to provide an information and booking service to prospective visitors, as well as acting in an advisory capacity to the municipality on issues of standards and service. It also provides the focal point for the development and coordination of any tourism related events in the region (Goodey, 1997).

It was determined, fairly early on in the heritage trail development process, that the generic nature of the DTB's function would be compromised if it was to become responsible for the activities of developing and marketing one specific product above all the other tourism products of the regions. In addition, the staff time was fully utilised with day-to-day DTB operations. Retraining possibilities were also eliminated due to the time and financial constraints at the time (Goodey, 1997).

Over the course of three months of evaluative work, the following practical solution emerged for the Heritage Trail Marketing Association:

- To gain agreement from the municipalities and the community that a separate organisation was required with a permanent staff member to undertake the duties of the association;
- To secure local operational and administrative funding for that person for a period of three years along with funding for the production of support brochures;
- To secure a permanent location for the association in a place agreeable to and paid for by both municipalities; and
- To recruit a local manager for the association, who would undertake necessary training (Goodey, 1997).

The process eventually took a period of nine months to complete, during which time the resident project manager completed many meetings with the Chamber of Commerce, the local municipalities, local influential commercial organisations (such as banks, manufacturers and petrol companies), communities and interested individuals of the region, the Slovenia Tourist Board (STB), the Ministry of Agriculture and the leaders of the Rural Integration Programme (Goodey, 1997).

Between November 1996 and January 1997, the four key objectives above were achieved. A dedicated member of staff was appointed to work in a municipality building in Novo Mesto, funded by the two participating municipalities. The post was funded for three years by a combination of municipality and Chamber of Commerce funds. Funding was secured for the production of the heritage trails brochure through the integration of the Rural Integration Programme's wine route, by the Ministry of Agriculture. A manager was appointed and training provided to facilitate the implementation of the marketing plan. In addition, the Slovenia Tourist Board has agreed to consider funding future support materials and in the interim, has offered promotional support as laid out in the marketing plan. This commitment was made clear in the focus of public relations attention given to the heritage trail at the Slovenia exhibition at the World Travel Market in London in 1996 (Goodey, 1997).

Care must be taken not to create unrealistic expectations in the community, especially where cooperative financing is concerned. Emerging regions need time to assimilate modern methods of tourism development and marketing. The focus should be on the development of skills in the short term. Even though slower progress is made, it can be used to build confidence and trust in the proposed system (Goodey, 1997).

Development should involve the close consultation of local community leaders, in both public and private sector, prior to any exploratory work being carried out. It is vital to establish any possible "economies of scale" and funding linkages at the outset in order that full commitment is given upfront (Goodey, 1997).

In cases where there is a need for training in technical skills for marketing implementation, short term technical assistance should be planned and budgeted for. This will help to ensure the output expectations of the project, transfer of technical skills and the sustainability and expansion of the project (Goodey, 1997).

2.5 FUNDING FOR DESTINATION MANAGEMENT ORGANISATIONS

According to Meyer (2004), the start-up of a route network requires significant effort and funding that may not always be readily at hand, particularly in remote or disadvantaged areas. One of the core elements of the establishment of a route is the formation of a tourism association or destination management organisation. Experience has shown that the upfront cost of such organisations far exceeds its potential income as many organisations take three or more years to establish and reach a point where they develop their "value proposition" and start drawing members. Prospective members are usually slow to join and adopt a "wait and see" approach to watch the association deliver its promises before signing up. To cover

expenses, membership fees are usually high and not affordable to small and emerging enterprises. Alternative sources of funding are thus essential during the establishment phase of an association.

A global study on the funding of destination management organisations (DMOs) conducted by UNWTO (2004) revealed that of DMOs at local level receive on average 40 percent of their budget from membership fees and activities or from advertising tourism businesses. Even so, all but two of the city DMOs interviewed drew some funding from regional, provincial or local government, with 44 percent drawing two-thirds of their income from this source. About 75 percent of city/local tourism organisations had an annual budget of between US\$1 million and US\$5 million. The survey, in which 550 DMOs took part, was the first of its kind to have been carried out on a global basis, as DMOs at national, regional and local level have emerged from efforts to create new structures and practices to make destinations more competitive (UNWTO, 2004).

While local governments in South Africa took over the responsibility for tourism development, it is frequently believed that the inability of local governments to take responsibility is commonplace (Meyer, 2006). The example of the disappointments associated with the Highlands Meander confirms this point (Rogerson, 2004a, 2004b, 2007; Donaldson, 2007). The issue of funding for associations remains unresolved in the South African context, however it is proven that associations and destination marketing organisations worldwide appear dependent on funding from provincial and local authorities to execute their functions properly. The South African situation, therefore, needs to be re-evaluated with regard to potential funding for private sector tourism organisations wanting to develop routes.

2.6 ELEMENTS OF SUCCESSFUL ROUTE TOURISM DEVELOPMENT

Meyer (2004) identified several factors as particularly significant ingredients for successful route tourism development. These are:

- cooperation networks, regional thinking and leadership;
- product development, infrastructure and access;
- community participation, micro-enterprise development and innovation;
- information and promotion; and
- an explicit pro-poor focus.

Meyer (2004) highlights the core ingredient of route tourism as the formation of co-operative networks among a multitude of often very diverse tourism suppliers. Indeed, pre-conditions

for establishing a route are leadership and the establishment of a good framework of collaboration between government, local council, private enterprises and associations, the tourism industry and local council. Conceptually, these collaborative associations are considered as 'route networks', characterized by participating parties being mutually dependent on resources controlled by others, albeit recognising that there are advantages to be accrued from a collective pooling of resources (Meyer, 2004).

According to Rogerson (2007) tourism routes provide opportunities for cooperation between communities and tourism enterprises. Some of the best and most successful examples of such 'routes' are the development of wine or food circuits, which have been widely researched in Europe, North America and Australasia (Meyer-Cech, 2003; Hall *et al*, 2003; Telfer, 2001a, 2001b; Telfer and Hashimoto, 2003). As illustration, the Niagara Wine Route in Canada links over 50 wineries in the region and is the anchor for wine tourism (Telfer, 2001a).

The second fundamental element for successful routes development is innovative product development and the provision of support infrastructure (Meyer, 2004). Key anchor projects or draw cards are necessary to ensure future visitor demand. As mentioned by Meyer (2004), key products developed in Northern Ireland included hiking trails, support infrastructure and information centres or "gateway points". Product development in the South African environment, however, is severely hampered by local political agendas. In the case of southern Africa, it is extremely important to be inclusive of all communities in the development of routes. As emphasised by Meyer (2004), community participation in tourism development has long become an established practice. Successful tourism calls for a 'people-centered' approach by which the voices of local people can be heard when making decision about the scale and type of development (Murphy, 1983, 1985; Meyer, 2004).

According to Meyer (2004), one of the most important considerations is to spread the economic benefits more widely spatially by developing tourist facilities, activities and services along tour routes in a manner that will facilitate tourist spending at these stopover points in order to provide additional employment and income, both directly and indirectly. The effective dissemination of information and the promotion of routes are crucial requirements for attracting visitors and ensuring its long term sustainability (Meyer, 2004). This aspect of route tourism development requires specialised skills and experience which are generally not available within communities. In addition, the marketing and promotion of destinations are expensive and are mostly neglected due to the lack of funds.

Meyer (2004) further includes the element of pro-poor tourism as an ingredient for the development of successful routes. Meyer (2004) argues that in order for the poor to benefit from route developments, it is essential that an explicit pro-poor focus be taken. Such an

approach goes well beyond new product development and niche marketing to recognizing that the prime aim of any route development is to use it to increase the net benefits to poor stakeholders.

The Midlands Meander is one of very few success stories of themed-based routes in developing countries. Many similar community projects have failed for a variety of reasons. Despite the fact that the Midlands Meander is completely private sector funded there has been some co-operation with the public sector in form of the involvement of the Midlands Meander Association in local planning issues (Rogerson, 2004a). It is the understanding that the Midlands Meander Route has evolved over twenty years and that consistency in their marketing efforts has been key to its success.

According to Mathfield (2000), the success of the Midlands Meander can be attributed to its setting in a historically white-owned commercial agricultural environment. It has tended to draw from a legacy of a bifurcated rural economy, in which the circle of community and economic interaction is drawn first around the enterprises themselves and then around existing white service providers. A similar trend was noticed with the Western Cape wine routes, where a successful tourism industry was built upon a successful agricultural sector (Nowers, de Villiers and Myburgh, 2002).

In the local economic impact study of the Midlands Meander, Mathfield (2000:60) stated that the route's contribution to direct employment is only marginal. The report states further that "... in terms of the work opportunities created, most of the enterprises are micro or small enterprises offering few job opportunities and invariably draw on the existing work force, where there is a need for additional labour. There are exceptions both in larger upmarket accommodation enterprises as well as in growing arts and craft enterprises. These are able to create new jobs...". A detailed investigation of the Midlands Meander Route has been conducted and is discussed in Chapter Four, with the aim of obtaining a deeper understanding of the internal workings, cost and benefits of the route on the community in the region.

2.7 CONCLUSION

Chapter Two confirms that tourism routes have the ability to spread economic benefits across a wide geographical area and provide additional employment and income through the expansion of tourism markets. The policy findings by Meyer (2004) emphasise the establishment of cooperation networks, regional thinking and leadership, product development, infrastructure and community participation, promotion and an explicit pro-poor focus as key elements for successful route tourism development. In addition, issues such as

funding for the effective management of destinations have also been flagged for further investigation. Chapter 3 is an in-depth investigation of international routes. The case studies include the Camino de Santiago in Spain, the Queensland Heritage Trails in Australia and Hadrian's Wall in the United Kingdom. The purpose of the investigations is to go beyond the policy findings of Meyer (2004) and to provide the foundation for developing a set of comprehensive planning guidelines for route tourism development.

CHAPTER 3:

INTERNATIONAL CASE STUDIES

Chapter Three represents the first part of the analysis of the planning and development aspects which underpin successful tourism routes. This chapter explores case studies of three well-known international routes, namely the Camino de Santiago in Spain, the Queensland Heritage Trails in Australia, and Hadrian's Wall in the United Kingdom. These routes were selected primarily for their prominence and success but also for their cultural focus and public sector involvement.

3.1 CAMINO DE SANTIAGO

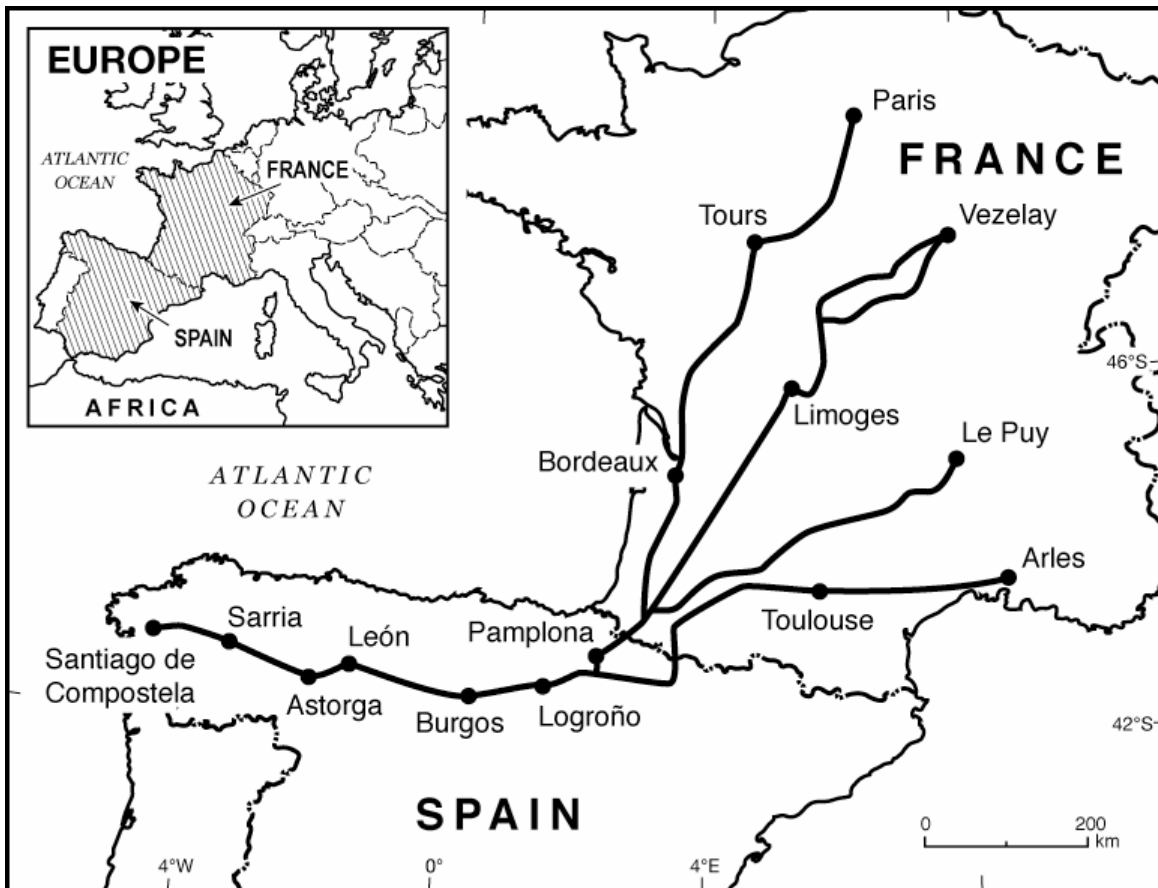
3.1.1 Background

The Camino de Santiago, which could be described as a 'linear tourist product', stretches along more than 700 km of northern Spain and is nearly 2000 km in total length when its four stems in France are included (**Figure 3.1**). The spatial focus of the route is Santiago de Compostela, the capital of the autonomous region of Galicia in La Coruña Province in north-western Spain (González and Medina, 2003).

The cathedral of Santiago de Compostela is believed to be the burial site of the apostle St James. Irrespective of this final destination, the route crosses many rural communities and villages in Spain and France and includes a wide range of historical and natural attractions. The medieval route between France and Spain has been recovered in recent years and offers tourists a unified experience that involves contact with nature and culture and allows these territories to enter the global tourism market (Frey, 1998; Gitlitz and Kay, 2000).

The essence of the Camino de Santiago is that the route itself, combining all or part of an itinerary with arrival at a destination, can function as a regional definition, a theme that transcends geographical diversity and distance to provide a spatially expansive but integrative marketable theme. Although such fixed itineraries have long been a fundamental element of cultural tourism, publications over the past 20 years – not least about the Camino itself – have increasingly suggested that experiences along the way are at least as important as the destinations themselves. Indeed, the route can be experienced without necessarily

ever arriving at its destination, and in turn the destination can be experienced without following the route (Murray and Graham, 1997).

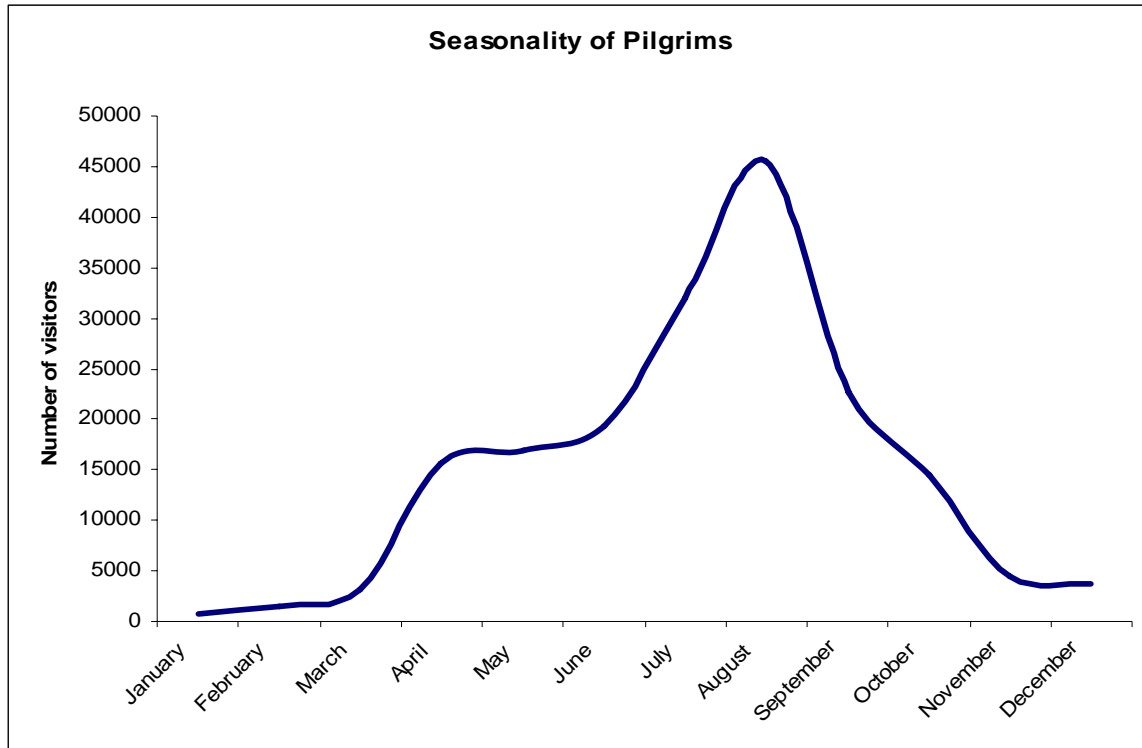


Source: Gonzáles and Medina (2003)

Figure 3.1: The Routes of the Camino de Santiago

Almost 90 percent of demand for the route is domestic in origin and, although less seasonally peaked than is true of the sun and beach tourism to which urban and rural tourism is being promoted as an alternative, demand remains concentrated between April and September, with a peak in August (see **Figure 3.2**) (Murray and Graham, 1997).

Such “alternative” tourism in Spain is characterised by a limited number of cultural themes, exploited through a spatially restricted number of itineraries. In terms of tourist-historic cities, for example, an integral component of the Camino complex, there has been little diversification of imagery, the development of new resources to attract visitors being dependent on special-event tourism involving short term – if large scale – efforts to boost a particular city's profile.



Source: Camino Pilgrim's Office (2006)

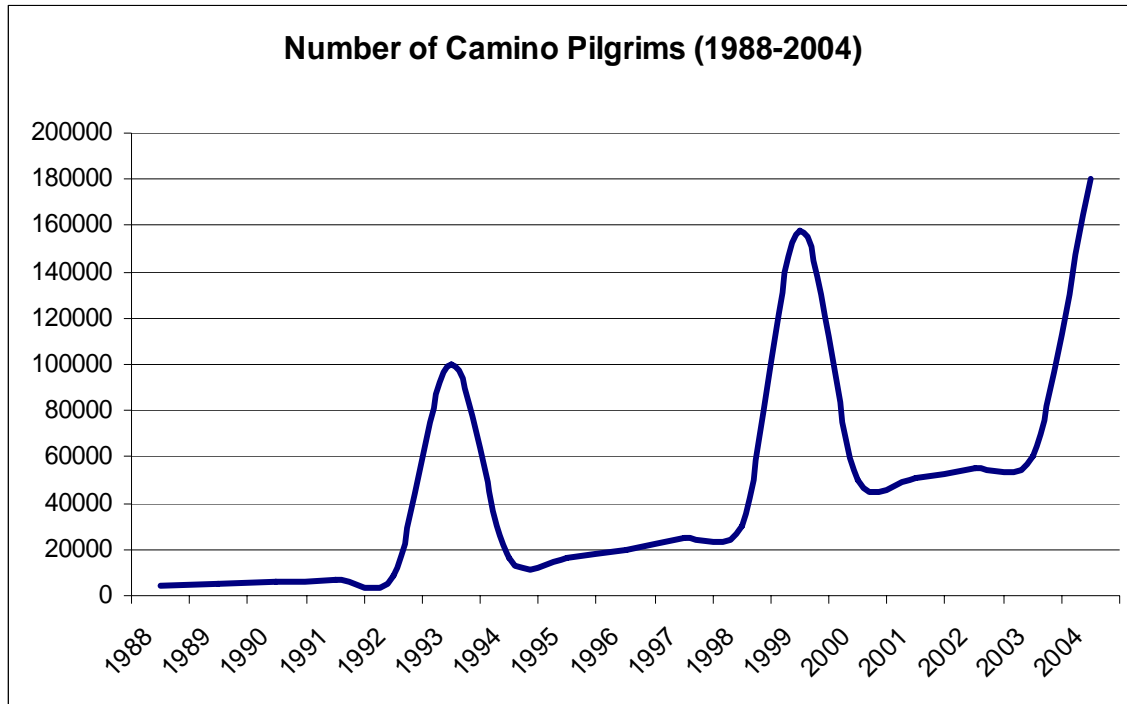
Figure 3.2: Seasonality of Pilgrims to the Camino de Santiago (2004)

An attempt has been made so far to explain how, in the past 15 years, urban and cultural tourism has boomed all over Spain. In the case of Santiago de Compostela, the celebration of the *Xacobeo 93* (Holy Year of 1993) marked a turning point in this process. It is important to note that pilgrimages to Santiago can be undertaken any month of any year. In addition, to comply with tradition, pilgrims are required to walk at least 100km, or to ride 200km by bike or on horseback; mechanical transportation has to be avoided to qualify as a pilgrim rather than a conventional tourist. According to this definition almost 180 000 pilgrims did the Camino “the traditional way” in 2004, of which 73 percent were on foot, 12 percent on bike and 15 percent on horseback (González and Medina, 2003). According to the Pilgrims Office people of all ages partake in the Camino; a large proportion (43 percent) of pilgrims is between the ages of 40 and 70, while 22 percent are between the ages of 21 and 30.

It is observed, however, that the most popular pilgrimage years are the so-called holy years, which occur whenever the patron saint’s day on 25 July falls on a Sunday. **Figure 3.3** shows the peaks in visitor numbers (“traditional pilgrims” only) during holy years.

Holy years used to be very important due to the fact that the church would then grant plenary indulgences. Nowadays, however, both tourists and pilgrims are lured by rites such as the opening up of the cathedral’s holy door, or by exhibits and events taking place throughout

the year. The celebration of the 1993 holy year encouraged the Galician government to launch an ambitious campaign (*Xacobeo 93*) publicising the pilgrimage to Santiago. The campaign offered a network of free hostels and organised a wide array of cultural events as a strategy to increase visitor numbers (González and Medina, 2003).



Source: Camino Pilgrim's Office (2006)

Figure 3.3: "Traditional Pilgrim" Visitors Since 1998

The result of the interventions was highly successful. Since 1993, the average number of tourists coming to Galicia has increased by 50 percent to about four million a year (Solla, 2002). *Xacobeo 93* was patterned on two events taking place the previous year, the Barcelona Olympic Games and the Seville Expo. Moreover, the recurrence of holy years asks for the periodical renewal of the campaign, which does not finish when the event is over. Consequently, *Xacobeo 93* was followed by *Xacobeo 99*, and *Xacobeo 2004*. In the interim, Santiago de Compostela was appointed one of Europe's capitals of culture in 2000. The city's tourism growth and urban preservation are maintained through a series of normal development phases and special years of celebration, with massive arrivals of visitors to the region of Galicia. According to Turgalicia (2005) the region received a total of 6 439 570 visitors (including the 180 000 pilgrims partaking in the Camino in the "traditional way") in 2004. It is evident that the region benefits from a variety of tourism markets and that the traditional pilgrims only represent a small proportion of the overall visitor demand.

3.1.2 Government Influence – Key Drivers of Tourism Growth

The economic “commodification” of the Camino de Santiago must be considered within the wider context of contemporary Spanish tourism promotion, which is seeking to diffuse tourism demand and supply more equitably throughout the country (Murray and Graham, 1997).

The Spanish government has included the heritage complex in its portfolio of strategic actions, designed to reverse declines in visitor numbers and receipts recorded during the latter part of the 1980s. All Spain's regions have administrative departments dealing with the development and regulation of tourism within their jurisdictions. The regional governments are increasingly incorporating tourism into wider regional development strategies and provide tourist advice through a network of information offices, which complement additional facilities funded by local authorities and Chambers of Commerce. In each of the regions of northern Spain, not surprisingly, the Camino has become a cultural resource and icon of regional identity and is marketed as such.

The *Xunta de Galicia*, for example, used during the 1993 *Año Jacobeo* celebrations, marking the 1000th anniversary of the supposed discovery of St James's tomb, to promote the city of Santiago de Compostela and all of Galicia's credentials as a region of “green” tourism. At a local level, the fostering of rural tourism is being promoted through community-based action groups, funded under numerous European Union (EU) initiatives, most notably the LEADER programme on rural development¹. Projects combine the promotion of the Way of St James with the establishment of a network of country homes and hotel accommodation. Numerous local architectural restoration projects are also related to the redevelopment of the Camino and the income which it might generate (Murray and Graham, 1997).

The French routes of the Pilgrimage Way to Santiago de Compostela benefited from the arrival of an increasing amount of visitors. By contrast, except for a number of historical cities in the Madrid area (Toledo, Segovia, Salamanca), other Spanish destinations hardly joined the travel packages. It was not until the late 1980s and early 1990s that a number of other cities, towns and other spaces were invited to join travel packages. This process was triggered by a number of factors, the territorial organisation of Spain under the Constitution of 1978, featuring prominently among them. Its statutes called for an administrative decentralisation which promoted regional territorialisation through the creation of *comunidades autónomas* (autonomous regions) (Murray and Graham, 1997). Galicia, a

¹ *Leader is one of four initiatives financed by EU structural funds and is designed to help rural actors consider the long-term potential of their local region. Encouraging the implementation of integrated, high-quality and original strategies for sustainable development, it has a strong focus on partnership and networks of exchange of experience*

region with a long-standing historical tradition and its own language and culture, is one of them. Thus, Galicia has been struggling to project a powerful image as an autonomous region to the outside world since the mid-1980s (Solla, 2002).

The promotion of the pilgrimage must be seen against the background of a regional government taking control over its territory and its capital under the auspices of a solid religious tradition and a medieval route. In addition, Santiago, along with other cities in the inner province, tried to improve its image in an increasingly competitive context; thus, the campaigns launched by Pamplona, Logroño, León and Burgos – all of them landmarks in the pilgrim route – aimed at calling people’s attention towards their historical heritage, cuisine, and their peaceful and unspoiled image. Further, other towns on the pilgrim route, such as Astorga, Sarria, Sahagún, or Santo Domingo de la Calzada have also benefited from the renewed interest in the pilgrimage to Santiago (Murray and Graham, 1997).

The role of the regional government in the tourist promotion of the pilgrimage to Santiago has been emphasised. In effect, the regional authorities’ jurisdiction includes tourist and cultural matters. Its tourism budget accounts for 50 percent of the total public expenditure, far above the 13-15 percent assigned to the local authorities. The Santiago de Compostela Council (as well as the León, Astorga or Sarria councils), however, has played an essential role in the promotion of the city. Its strategy has revolved around a careful urban preservation of the city’s historical assets, which was designated a World Heritage Site (WHS) in 1985, and the funding of the rehabilitation of old buildings and monuments (Murray and Graham, 1997).

In this respect, it must be borne in mind that the Spanish public opinion assigns a great deal of importance to the consideration of cities or landscapes as WHSs. Since the 1980s, several campaigns have been organised demanding that particular cities in Spain be considered as WHSs.

3.1.3 Santiago de Compostela – The “Anchor Project”: Catalyst for the development of the Camino de Santiago

Santiago is a middle-sized city, with 95 000 inhabitants in the city centre and 130 000 in the urban area. It lacks industry, but has a strong tertiary sector. It is located in the middle of a regional urbanised axis running from north to south – A Coruña, Ferrol and Vigo – with about 2 million inhabitants. The 1980s marked a turning point in the history of Santiago. On the one hand, the newly born *comunidad autónoma* of Galicia began to invest in the capital. On the other hand, the coming to power of architect Estévez as the city’s mayor – backed up by a socialist team on good terms with the central government – favoured the revalorisation and

protection of the city’s historical heritage. The first result of the improvement of Santiago’s urban image was the designation of its historical centre as a WHS by UNESCO in 1985 (Table 3.1).

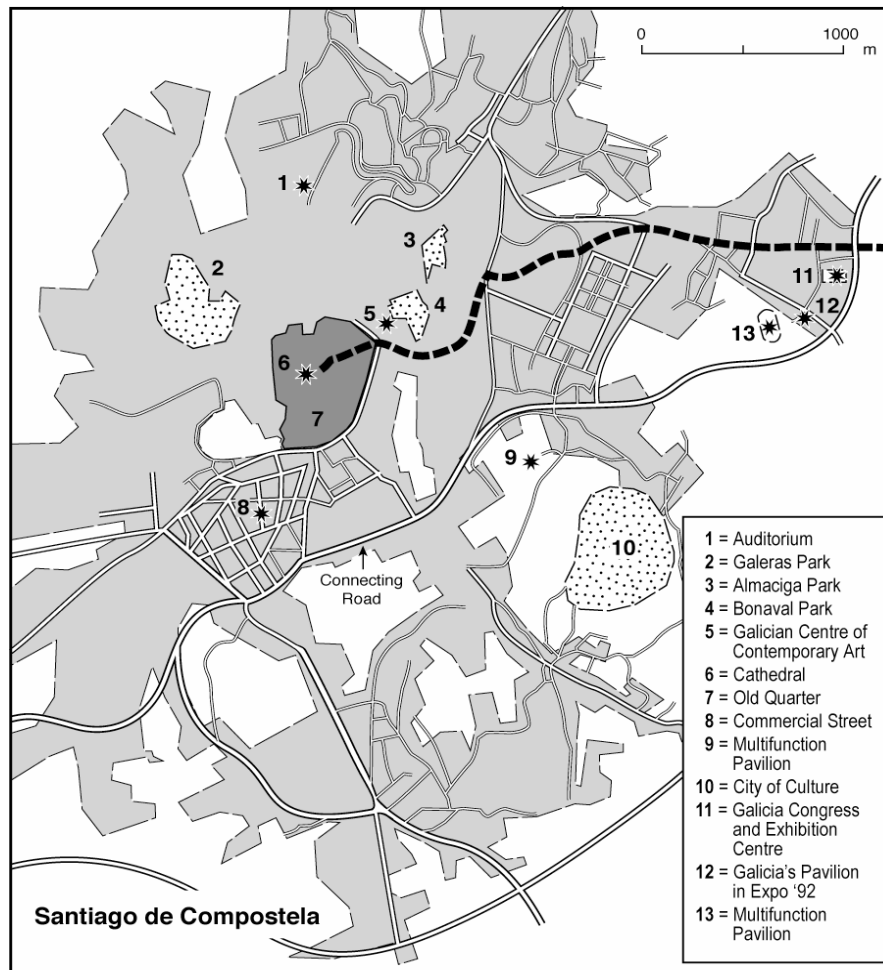
Table 3.1: Santiago de Compostela and the Camino: Chronology of Institutional Undertakings and Events

<i>Year</i>	<i>Undertaking</i>	<i>Institution</i>
1962	Designation of the Camino de Santiago as part of the Artistic and Historical Heritage	Spanish Government
1985	Designation of the city of <i>Santiago de Compostela</i> as a World Heritage Site	UNESCO
1987	The Camino de Santiago. First European Cultural Itinerary	European Council
1989	General Plan of Urban Management	Local authorities
1991	Creation of The Royal <i>Xacobeo</i> Board	Regional government and Parliament
1992	Creation of the <i>Xacobeo</i> Council and the Consortium of Santiago	Governments and local authorities
1993	Designation of the Camino de Santiago Route as a World Heritage Site	UNESCO
1993	<i>Xacobeo</i> 93: a campaign for the promotion of cultural tourism	Regional government
1994	Europa Nostra Award	European Council
1997	Special Plan for the Preservation of the Historic Centre	Local authorities
1999	<i>Xacobeo</i> 99: a campaign for the promotion of cultural tourism	Regional government
2000	European Culture Capital designation	European Board
2002	Special Statute highlighting Santiago’s status as the Regional Capital	Regional government and Parliament
2004	<i>Xacobeo</i> 2004: a campaign for the promotion of cultural tourism	Regional government

(Source: Gonzáles and Medina, 2003)

This initial stage reached its climax with the passing of a General Plan of Urban Development in 1989 (see Table **Table 3.1**). This plan dealt with three key issues: the city’s steady growth into a power centre; its integration into the wider urban area in which it belongs; and, the compartmentalisation of the city for practical purposes, such as the preservation of its historical centre (Gonzáles and Gonzáles, 1998). The early 1990s and,

specifically, the 1993 holy year, were pivotal to the territorial development and tourist promotion of Santiago. The urban development policies implemented were based on the independent cooperation between the regional and central governments, local administrations, the university and the church. All these bodies make up the Consortium of Santiago, which manages the urban development plans and other related issues. The different officials and administrators of the past 15 years have been aware of the fact that Santiago is an architectural treasure. This fact makes the cooperation between local and regional administrations mandatory in order to avoid any kind of urban decay. As mentioned earlier, the regional government launched a large-scale campaign to attract thousands of tourists by setting up network of hostels along the *Xacobean* Route. This initiative was aimed at the revitalisation of the pilgrimage tradition. In addition the initiative included a large number of urban renovation plans in the city of Santiago (**Figure 3.4**) (Estévez, 2001).



Note: The dashed line is the Camino, or Pilgrimage Way.

Source: Gonzáles and Medina (2003)

Figure 3.4: Main Urban Improvements in Santiago de Compostela (1993-2002)

At present, Santiago relies on its internationally recognised image of prestige. There is a steady influx of tourists every year, although this varies according to whether the year is a holy one or not. The organisation of cultural events and conferences does not correspond to what would be expected from such a small city. The celebration of the 2004 holy year brought about two challenges related to urban planning and tourism: the harmonic integration of the modern part of the city into the historical space, and the need to control and manage the overwhelming amount of tourists of all kinds who crowd the historical centre of the city (González and Medina, 2003).

The city of Santiago paved the way for the development of several other cities on the Camino in later years. For example in the city of León, promotion began by highlighting relevant monuments but later included the restoration and management of the historic part of the city as a whole. The city of Astorga rehearsed the most complex, diversified and global promotion and communication scheme of all cities on the route. Finally, in relation to the model of Sarria, publicity (gaining recognition from the European Council, UNESCO and the EU) has gone hand in hand with the interventions of urban renovation and the reinforcement of the conscience of Santiago's own inhabitants that they live in an exceptional city (González and Medina, 2003).

3.1.4 The Role of the Council of Europe

Although cultural preservation through the formation of themed routes has been a subject of interest for the Council of Europe since the 1960s, its first funded initiative, The Cultural Routes Programme, was launched in 1987. The initial concept was to demonstrate in a visible way, by means of a journey through space and time, how the heritage of the different countries of Europe represented a shared cultural heritage. The Cultural Routes provide a concrete demonstration of the fundamental principles of the Council of Europe: human rights, cultural democracy, European cultural diversity and identity, dialogue, mutual exchange and enrichment across boundaries and centuries (Council of Europe, 2002).

The first example, the Santiago de Compostela Pilgrim Routes, served initially as a source of inspiration, and then became the reference point for the development of future activities. The main aims of the programme are:

- To raise awareness of a European cultural identity and European citizenship, based on a set of shared values given tangible form by means of cultural routes retracing the history of the influences, exchanges and developments which have shaped European cultures;

- To promote intercultural and inter-religious dialogue through a better understanding of European history;
- To safeguard and enhance the cultural and natural heritage as a means of improving the quality of life and as a source of social, economic and cultural development; and
- To give pride of place to cultural tourism, with a view to sustainable development (Council of Europe, 2002).

Resolution (98)4 of the European Council's Committee of Members and its appended rules establish a formal framework for cooperation among the 48 signatories of the European Cultural Convention (Council of Europe, 1994). These countries can make proposals for routes, which must satisfy the following criteria to be eligible for the programme:

- Be centred on a theme representative of European values and common to several European countries;
- Follow a historical route or (in the case of cultural tourism) a newly created route;
- Give rise to long-term multilateral cooperation projects in priority areas (scientific research; heritage conservation and enhancement; cultural and educational exchanges among young Europeans; contemporary cultural and artistic practices; cultural tourism and sustainable development);
- Be managed by one or more independent, organised networks (in the form of an association or a federation of associations).

A technical body, the European Institute of Cultural Routes, was set up in 1998 for operational purposes. Its role is:

- To examine applications for new projects;
- To monitor activities in the field and coordinate the work of partner organisations;
- To disseminate and archive information documents;
- Defines the policy direction for the Cultural Routes programme;
- Adopts new themes and routes;
- Approves networks; and
- Awards "Cultural Route of the Council of Europe" or "Major Cultural Route of the Council of Europe" certification depending on the project's pan-European scale (Council of Europe, 1994).

According to the Council of Europe (1994), "Major Cultural Route" status was awarded to the following projects after 1998:

- The Santiago De Compostela Pilgrim Routes ; Pilgrim Routes;
- The Mozart Route; Historical and Legendary Figures of Europe ;

- The Legacy of Al-Andalus ;
- The Route of the Castilian Language and its Expansion in the Mediterranean: The Sephardic Routes;
- The Hansa;
- Parks and Gardens, landscape;
- The Viking Routes; Vikings and Normans;
- The Via Francigena; Pilgrim Routes;
- Saint Martin de Tours, a great European figure, a Symbol of sharing; and
- The Jewish Heritage Routes.

In total, 20 routes were developed over a period of 17 years.

The principles of cultural routes of the Council of Europe are:

- The priority of the cultural routes is and will remain cultural. Offshoots such as research, education, heritage, creativity and tourism are to be welcomed, but knowledge of others and exchanges are still the fundamental elements.
- The Council of Europe's message must be communicated based on its fundamental values: Human Rights, democracy, and the rule of law. Cultural routes appear to be particularly well tailored to reinforcing values such as tolerance and solidarity and at combating unemployment, exclusion and the resurgence of xenophobic nationalism.
- The transfrontier and European dimension of the routes may (and must) contribute to the project's interdisciplinary aspect developing an awareness of multiple cultural identities.
- The conservation and enhancement of the architectural and cultural heritage are an important part of the routes, but they can only take on their full significance when placed in a dynamic relation with contemporary creation.
- Cultural Routes are not restricted to the development of a cultural tourism "product". They are based on a process of cultural cooperation which is constantly evolving thus necessitating constant action, research and evaluation, and the installation of European partnerships with the network (Council of Europe, 1994).

Funding to establish routes through the programme varies between €850 000 and €5 million in grant schemes, depending on the scale and significance of the initiative. These funds are mostly spent on macro planning, institutional development of management structures and upgrading of tourism infrastructure and the enabling environment. This programme is linked to the 'Culture 2000' programme, which is funded for €236.5 million over six years (2000–2006) and is designed to market and promote the routes (Council of Europe, 1994).

The Council of Europe was instrumental in the revitalisation of the Santiago de Compostela in the 1990s. The organisation had the following objectives:

- To work with specialists from all over Europe to identify the routes and produce maps;
- To create a common emblem which would give a visual identity to the routes as a whole throughout Europe;
- To coordinate the activities of public and private partners, and in particular those in the voluntary sector and to encourage activities which respect both the sensitivities of pilgrims and of tourists;
- To provide, particularly to young people who are looking for new recreational opportunities, new ways of encouraging integration in society and ways of feeling more strongly their European identity (Council of Europe, 1994).

The growing importance of the economic component in tourism, particularly in rural areas or regions experiencing industrial transformation led to the need for an improved definition of the project in terms of development and cultural and economic management. Finally, the diversification of the themes generated new models and approaches towards the functioning of routes.

3.1.5 Route Infrastructure

The contemporary Camino constitutes a much more definitive itinerary and is also far more clearly demarcated than at any time in the past. Considerable lengths of the traditional French itineraries are now incorporated into the network of way-marked *Grand Randonnees* (long-distance trails), while the Camino de Santiago launched a cultural routes programme inaugurated by the Council of Europe in 1987 to celebrate the unity and diversity of European identity. As a result, way-marked routes now stretch some 850 km from the *Col de Ibaneta* above *Roncevalles* to Santiago de Compostela itself. These are signposted by diagnostic, signifying motifs, the most ubiquitous depicting the scallop-shell symbol of St James turned on its side and streamlined into a fan of lines meeting to the left. This represents the roads of Europe, symbolically joined and leading always westward to Santiago (**Plate 3.1**) (Murray and Graham, 1997).

The scallop-shell is accompanied in contemporary marketing and way-marking by a drawn mascot figure – *Peregrin*. The signage distinguishes between on- and off- road itineraries and much of it is indicative rather than interpretative.

In so far as is possible, the way-marking distinguishes two modally separated routes, one for vehicles and one partly off-road for walkers and cyclists, which are integrated at the various attractions along the Camino and within the shared destination of Santiago de Compostela, thereby facilitating the marketing of the heritage complex. It should not be assumed, however, that the off-road route is a more authentic, medieval relic (Murray and Graham, 1997).

Plate 3.1: The Contemporary Camino de Santiago Route Signage: Holy Year Festivals and Pilgrims on the Route



Source: www.xacobeo.es

In one of the small towns forming part of the route, Navarra, the regional government recognised that there was “no fixed and abiding road” to support pilgrims and other tourists on the route. Accordingly, they invented a definitive itinerary through a local planning act of 1988, which defines a route, three metres wide, that avoids “main roads, built-up areas, agricultural land and dumping sites and is accessible only to walkers and those on horseback”.

Much of the pedestrian and cycle itinerary between the Pyrenees and Santiago now takes this purpose-built or demarcated form, combining very considerable sections of newly built pathways with stretches of Roman road, older long-distance footpaths and even abandoned roads and cart-tracks between villages. Nevertheless, some use is still made of main tar roads (although these sections are increasingly being paralleled by new off-road sections) while secondary roads are still extensively employed. These are rarely frequented by much vehicular traffic, especially west of Astorga. Hence, particular sections of the Camino – those which are modally separated and/or offer physically pleasing amenity environments – are likely to be more attractive to walkers and cyclists. Besides the Pyrenees, such stretches include the country west of Estella, the Montes de Oca east of Burgos, the Montes de León west of Astorga, and the crossing of the Cordillera Cantabrica into Galicia at O Cebreiro. Indeed, the final 250 km of the way-marked Camino from Astorga to Santiago is generally the most consistently attractive stretch and draws more walkers than anywhere else. Such stages contrast markedly with dreary sections traversing the industrial and residential suburbs of the larger cities and towns, and the rigours of the exposed *meseta* lands west of Burgos (Murray and Graham, 1997).

The contemporary Camino de Santiago is a typical example of what has become known as “green” tourism. It is also sustainable tourism in the sense that there is, as yet, very little evidence to suggest that its development has caused any environmental degradation. Footpath erosion, for instance, is not a problem while tourism expenditure is also being diffused into small communities.

According to the Regional Tourism Authority, TurGalicia, the region boasts a total of 112 000 beds of which 38 percent are provided in hotels, 16 percent in hostels and the remaining 46 percent in guesthouses, bed and breakfasts, farmstays, apartments, self-catering and camping. The network of Spanish Government-owned “*paradores*” (hotels) is a major factor in shaping the pattern of road-based tour itineraries offered by commercial companies on the Camino. Walking or cycling itineraries vary. Visitors also have the option of participating in commercially or privately-organised “walk-and-ride” schemes, in which particularly attractive sections of the Camino are tackled on foot with vehicles being used to link these together and carry luggage. Operators of commercial walking tours prefer to book their guests into the government-owned hotels, because of its favourable locations along the route and its affordability (Murray and Graham, 1997).

3.1.6 Promotion of the Camino de Santiago

The Spanish Tourism Promotion Strategy can be considered an integral part of tourism policy in Spain. However, most regional and local public administration bodies such as

Turgalacia or Tursantiago in charge of promoting tourism are organised as autonomous institutions or as public enterprises. Sometimes promotion is considered independent and separate from tourism policy and from the strategy to develop tourism products and destinations. To avoid confusion, the understanding between national, regional and local agencies is that promotion of tourism to foreign markets is the sole responsibility of the Spanish Tourism Board, while regional and local councils are responsible for domestic and to some extent regional promotion (Turespaña, 2000).

From the operating angle, such separation can have negative consequences in that promotion is a powerful tool for implementing a tourism policy that aims to develop a specific tourism product or destination. To overcome this issue, the Spanish Government developed a Spanish Cultural Tourism Plan that contemplates measures aimed to transform cultural resources into cultural tourist products, that is to say the supply side, and initiatives to promote cultural products and destinations in markets, or the demand side (Turgalicia, 2000).

To illustrate this, the Cultural Tourism Plan includes cooperative actions in the supply side, as Joint Development Plans in all the Spanish cities declared as part of the World Cultural Heritage, and, in the demand side, there are joint marketing plans to promote these cities as cultural destinations in the source markets (Turgalicia, 2000).

As 90 percent of the market demand for the Camino originates from Spain and surrounding European countries, the marketing is mainly aimed at these markets. The Camino receives widespread coverage through public relations campaigns in their main target regions. Further numerous multi-language guidebooks have been developed for different portions of the Camino defined by feasible daily distances, the location of key attractions and the infrastructure of affordable accommodation (Turgalicia, 2000).

The consumers of the Camino heritage tourism complex comprise a range of niches with different demands – tour/vehicle-based travellers, cyclists and walkers of various kinds and motivation. Overall, the extent of purely vehicular itineraries, which can be equated to the mass tourism segment of route-related travel that generate higher income, is very difficult to quantify because these centre on the tourist-historic cities, in which better-quality accommodation is concentrated but which also constitute tourism attractions in their own right. Conflicting motivations for doing the Camino complicates the marketing of the route as a tourism complex (Murray and Graham, 1997).

Marketing is concentrated at the major and minor nodes. According to TurGalicia (2000), the individual towns each have their own marketing plans and budgets to promote their activities on the Camino. TurGalicia is responsible for the overall coordination of regional promotional

activities such as festivals and events. The events calendar for the region contains a list of 56 events varying across all market interests (for example car shows, food and wine expo's, craft and jewellery shows and leisure and outdoor exhibitions) taking place on an annual basis.

The Camino is marketed through several websites including the regional tourism organisation (www.turgalicia.es). In addition, each of the individual towns and prominent cooperative websites (private and public sector joint ventures) are used to promote local and regional attractions such as <http://www.santiagodecompostela.org/>, <http://www.santiagodecompostela.com> and <http://www.consorcio-santiago.org>.

3.1.7 Conclusion & Critical Success Factors

Overall, the Camino was a very important part of the strategic development and diversification of the Spanish tourism sector. The growth of mass tourism in the 1960s and 1970s in Spain favoured those destinations offering sun and sand, while the remaining regions have had to resort to new strategies of tourist promotion since the 1980s. The promotion of cultural tourism has been pivotal in the creation of new tourist destinations in northern and western Spain, where the Route to Santiago is one of the most successful tourist products.

There is a strong relation between cultural tourism promotion and rehabilitation of city centres around the Camino. This concurrence was integral in those places where tourism is a fundamental economic sector (like the town of Santiago) or in small towns with no other economic alternative such as Astorga. In addition, the massive arrival of tourists and the desire of the route management to maintain the economic urban recovery that this fact supposes, promote other changes in the development of tourism products. Thus, new spaces for culture and leisure (museums, auditoriums, sports facilities or parks) in the cities and also in small towns are created, while residential constructions near the way are restricted and used in tourist zoning.

In addition, it is important to note the fact that one of the major drivers of the Camino is its relative proximity to major domestic and regional tourism markets. Overall, 90 percent of visitors to the Camino are domestic or regional and two of the worlds major generating markets - Germany and the United Kingdom - are only two to three hours travel away by plane.

The example of the Camino shows that political power, especially at local and regional levels, plays a very important role in deciding the strategy of tourism promotion and urban

planning. In addition it provides evidence that the local administration can work alongside the regional government and the private sector.

The uniqueness of the Camino lies in its religious appeal and the pilgrim experience it offers in a setting of magnificent scenery and cultural assets dating back to the Middle Ages. Even though the route concept is little different from what is being developed in other countries, the Camino remains a unique, highly successful and sustainable tourism destination.

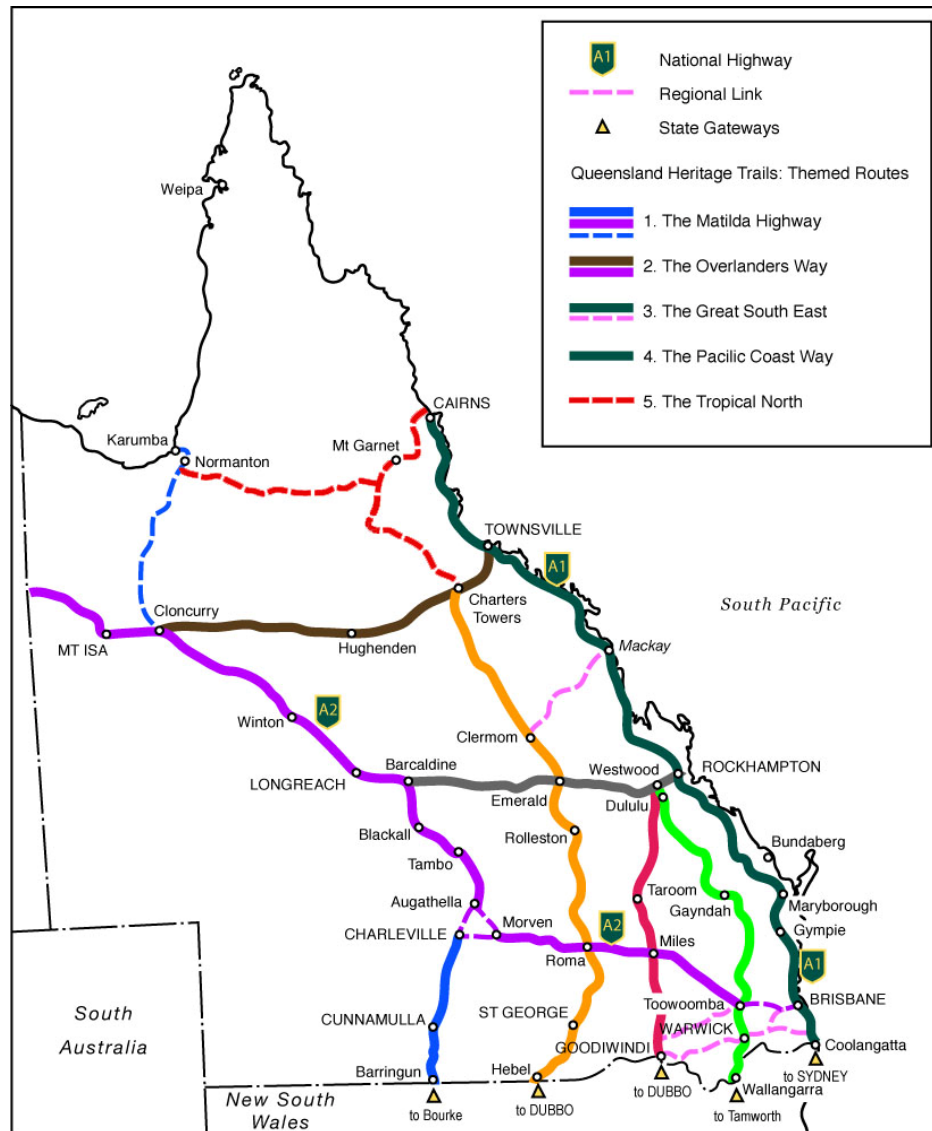
This case study of the Camino de Santiago thus outlines the key success factors of the route drawing relations between key aspects such as preservation of cultural heritage, institutional support for the route and tourist promotion of the Camino.

3.2 QUEENSLAND HERITAGE TRAILS

3.2.1 Background

The Queensland Heritage Trails comprise five trails in the state of Queensland, Australia. The trails are branded 'the Matilda Highway', 'the Overlanders Way', 'the Great South East', 'the Pacific Coast Way' and 'the Tropical North'. The trails were developed over a period of five years (1999-2004) as a result of the Queensland Heritage Trails Network (QHTN) Programme. The trails include a variety of attractions of which cultural heritage is the most prominent, spanning coastal and inland routes that link larger cities and small villages to heritage attractions and themes extending thousands of kilometres (QHTN, 2006). According to the Queensland Department of Main Roads (2001) the initial strategic approach of economic development was adopted for the establishment of themed routes as shown in **Figure 3.5**.

According to Jackson and Murphy (2006), as a consequence of changing industrial patterns in regional Australia, tourism has gained increasing prevalence as an agent for regional economic development. Self-guided car or walking trails are well-established heritage tourist products in Australia. The scale of trails can vary from local community linkages to heritage theme trails which extend thousands of kilometres. In Australia there was a rapid expansion of trails during the 1988 Bicentennial Celebrations. Many were worthy but suffered from an insufficient understanding of what makes for a successful visitor attraction. Low levels of demand, inadequate attention and increasing maintenance costs have led many metropolitan and regional trails to fall into disrepair. Nonetheless, the Queensland Heritage Trails (QHT) demonstrated reasonable success – mostly defined by the ability of themed routes to link heritage sites, rural communities and nature-based attractions to the main stream tourism segment in Queensland which is beach tourism (QHTN, 2006).



Source: Queensland Department of Main Roads (2001)

Figure 3.5: Queensland Heritage Trails – Themed Routes

The Queensland Heritage Trails Network (QHTN) concept was designed to collectively develop and market cultural heritage attractions within a particular region which would not have come to fruition through private-sector investment. The programme links together authentic heritage experiences, such as the new Qantas Founders Outback Museum, making it easier for visitors to discover more of Australia’s unique history, culture and natural wonders (QHTN, 2006).

The aim of the concept is to create jobs and increase awareness and capacity through educational programmes as well as to deliver sustainable economic benefits for local communities through increased tourism demand.

3.2.2 The Drive Tourism Campaign

According to Tourism Queensland (2000) the establishment of the QHT was a result of a bigger campaign called “The Drive Tourism Programme 2000-2002”. The state of Queensland in Australia recognised the significance of this market in 2000 when research revealed that an estimated 70 percent of all trips within Australia were taken by people on holidays or visiting friends and relatives in either their own car or a hired vehicle (Tourism Queensland, 2002).

In Australia, the drive market has, for many years, been the industry’s silent majority. This is reflected in the lack of dedicated drive market research and debate in either academic or industry circles. Steadily, however, interest in the market has grown, with Queensland leading with their “Drive Tourism Campaign”.

The state of Queensland relies heavily on the drive market, especially in regional and remote areas where it represents up to 85 percent of the total market. In the case of Queensland, the drive market is worth an estimated AUD 4,4 billion in visitor expenditure per annum. Research conducted by Tourism Queensland in 2000 highlighted that the drive market is large but not homogeneous. This research found that the drive market is made up of a number of different segments with unique travel patterns which limit its ability to be dispersed to regional Australia and dictate its travel behaviour (Olsen, 2003).

According to Olsen (2003) the research identified four distinct market segments, classified by the length of their trip - the “short break” (one to three nights), “short tours” (four to seven nights), the “big tour” (eight to 21 nights) and the grand tour (22+ nights). The market segmentation by “length of stay” provided the first step in understanding the potential opportunities in the drive market. **Table 3.2** provides a summary of the drive market segments for Queensland. Sixty-five percent of the drive markets are trips of up to three nights. Further research revealed that these trips are mostly taken within 400km from the point of origin (Olsen, 2003).

This rapidly growing drive tourism market represented a significant opportunity for many regional areas, and for certain types of themed routes. Research by Yann Campbell Hoare Wheeler (1999) found that tourism-themed routes were most popular with the “big tour” and “grand tour” segments, but also with segments of the short tour market.

Tourism Queensland (2000) estimated that the short tour, big tour and grand tour markets account for approximately 35 percent of the drive market in terms of visitor demand. That is a market of some 3,8 million travellers which contribute an estimated AUD 3,1 billion to the

economy of the state of Queensland, based on estimated expenditure in Queensland drawn from the Tourism Queensland Research Unit (Tourism Queensland, 2000).

Table 3.2: Drive Market Segmentation (Queensland)

Segment	Visitor Numbers			Value/Yield		
	Number 2000 '000	%	Growth 1999/ 2000	Total expenditure (2000) (AUD)	Growth 1999/ 2000	Average Spend per Traveller (AUD)
Grand Tour (22+ Nights)	308	2.8%	1.7%	598 m	8.9	1 942
Big Tour (8-21 nights)	1 314	12.3%	1.6%	1.3bn	9.7	1 042
Short Tour (4-7 nights)	2 179	20.4%	15.4%	1.1bn	29.1	506
Short Break (1-3 nights)	6 903	64.6%	6.5%	1.3bn	1.9	194
Total Drive Market (Queensland)	10 700	100%	7.5%	4.4bn	11.0	412

Source: Yann Campbell Hoare Wheeler (1999)

Though the research by Yann Campbell Hoare Wheeler (1999) highlighted the fact that the drive market is a complex market with a range of unique qualities and a variety of identifiable segments and sub-segments, the key characteristics are the inherent flexibility in a drive holiday, the choice of a preferred destination, the choice of a route in pre-trip planning, the opportunity to alter the chosen path en route and the role of information en route to impact on length of stay and expenditure. These qualities create significant opportunities for regions to gain economic benefits from the drive market that are not available from other sectors such as the fly-in/fly-out market. Tourism themed routes in Australia have been developed to meet the needs of the drive market and to deliver on a range of wider objectives including more efficient use of infrastructure, road safety and regional development (Olsen, 2003).

The development of themed routes in Australia posed a number of significant challenges that needed to be overcome. Despite the best efforts of many stakeholders, the understanding of visitor patterns, the market for themed routes and the changing needs of the visitor market in Australia remain elusive. The challenge for the development of effective themed routes in the future is to ensure that regular research is undertaken in order to understand the market for themed routes, its limitations and future needs. According to the Tourism Queensland (2000), an oversupply of tourism themed routes could result in “muddy waters” and undermine the effectiveness of a network of routes. Moreover, it will require increased coordination, cooperation and ongoing research, as stakeholders fear that travellers might become overburdened with products to purchase and that they may perceive a decline in the value of all tourism themed routes (Olsen, 2003).

3.2.3 National Branding & Signage

Visitors travelling in Australia cross over many administrative boundaries, expecting consistency and reassurance throughout their journey. At present in Australia, there are more than 20 separate tourism themed routes being promoted, each at different levels of the themed route spectrum. The need for increased consistency has been recognised at a national level with the formation of a National Tourism Signing Reference Group, under the auspices of the Australian Standing Committee on Tourism (ASCOT). For each route a “Themed Route Tourism Signing Scheme” was developed as shown in **Plate 3.2**.

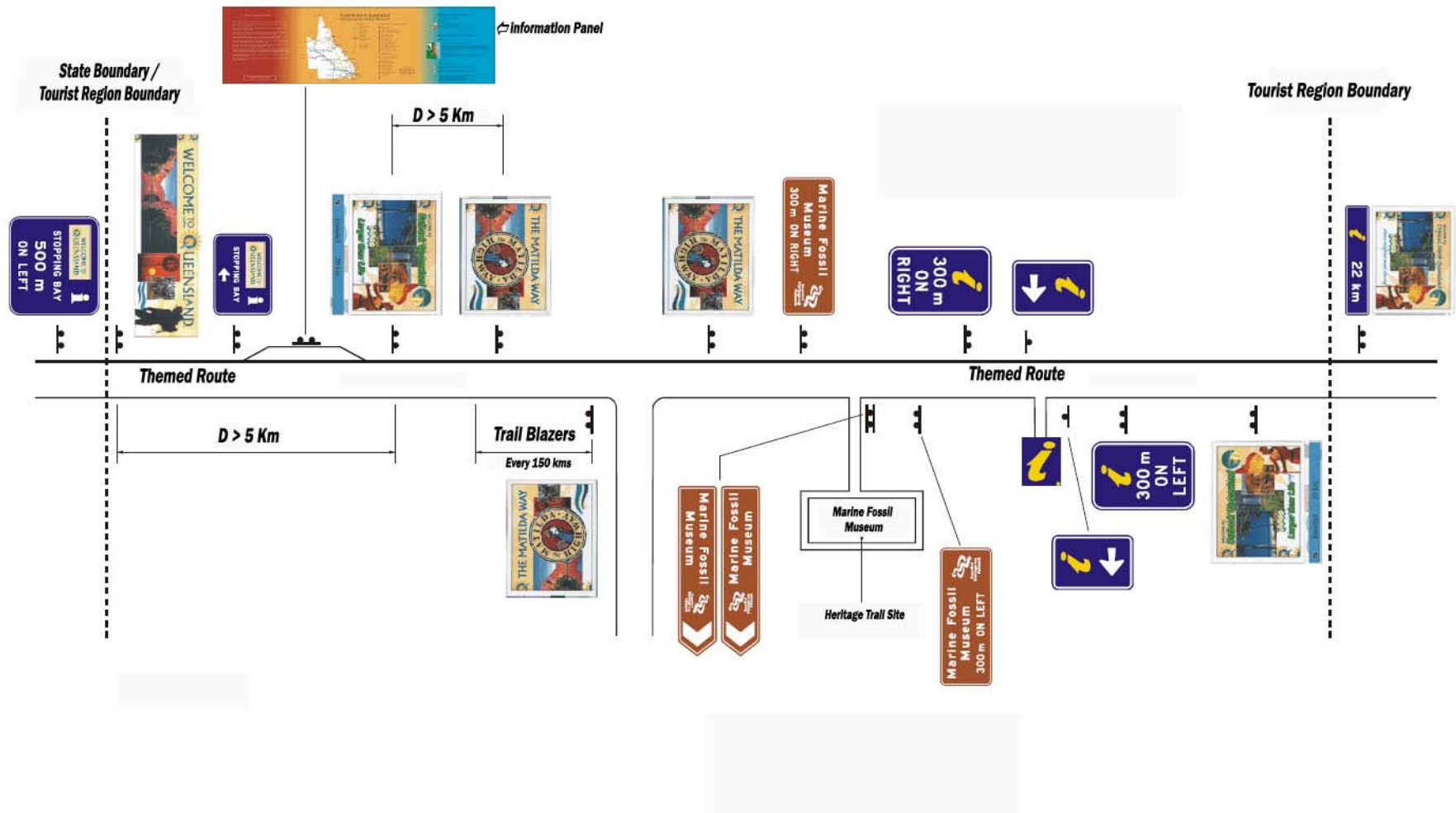
The Queensland Department of Main Roads (2001) stipulated that the signage for each route should contain the following:

- Border gateway statements such as “Welcome to Queensland”;
- Information Panels – highlighting the key tourists attractions in the destination;
- Regional tourism gateway signs such as “Welcome to Southern Downs”;
- Themed route signage for example “the Matilda Highway”; and
- Signage to information centres, fuel stops, major attractions – with specific branding for the Queensland Heritage Trails Network attractions.

The “Drive Tourism Plan” produced by the Queensland Department of Main Roads (2001) indicates that, in addition to the route branding, each of the 14 regions in Queensland has its own branding logo and slogan as defined by Tourism Queensland. To illustrate this, each region with its unique slogan is listed as provided in the “Drive Tourism Plan”. The five tourism routes are coordinated at state level and operate across all 14 regions.

1. Gold Coast	-	“The Coast With the Most”
2. Brisbane	-	“City of Sun Days”
3. Sunshine Coast	-	“Just North of Brisbane. Just Perfect”
4. Fraser Coast	-	“Perfect by Nature”
5. Bundaberg	-	“Coral Isles and Country”
6. Gladstone	-	“Everything to be Explored”
7. Capricorn	-	“Everything to be Explored”
8. Mackay	-	“The Heart of Queensland”
9. Whitsundays	-	“Out of the Blue”
10. Townsville	-	“First Stop in Nature's Theme Park”
11. Tropical North Queensland	-	“Where Rainforest Meets the Reef”
12. Outback Queensland	-	“Larger than Life”
13. Toowoomba	-	“the Garden City”
14. Southern Downs	-	“Wake up to the Beauty of it”

Plate 3.2: Queensland Themed Route Tourism Signing Scheme



Source: Queensland Department of Main Roads (2001)

Regional Distribution

According to Olsen (2003), regions throughout Australia are in the midst of a change of economy from traditional rural industries such as sugar, timber and mining to more service-based industries such as tourism. The economic decline in many regions led to a support for tourism development within local communities (Jackson and Murphy, 2006). Over the period 1984 to 1997, tourism has helped to create 1,8 million new jobs while manufacturing, mining and agriculture combined created only 5 000 new jobs (Olsen, 2003). In areas where employment (especially for young people) is a major imperative, tourism is often the only solution. Many areas of outback Queensland have experienced an economic resurgence as a result of tourism (Olsen, 2003).

According to Olsen (2003), from a visitor's perspective, a critical mass of attractions is needed to overcome the distance. Olsen (2003) continues to point out that, in between all the information, signs, brochures, guides, maps, logos and images, road users seek "reassurance". Cooperation from a range of reliable stakeholders like transport authorities, map providers and government agencies can, in the traveller's mind, balance the perceived overly positive tourism "spin" provided in brochures (Olsen, 2003).

Promotion of Themed Routes

The research of Yann Campbell Hoare Wheeler (1999) supported the notion that visitors first select the destinations and then the route (to a lesser degree). It was discovered that more than 60 percent of the route planning for a longer-haul journey is done prior to departure, in what is referred to as "pre-trip planning". Thus, for regions to successfully tap into the drive market they need to get the information to potential visitors prior to their departure.

Research in Australia by Tourism Queensland (2000) found that tourism themed routes contributed significantly to making particular routes more attractive to visitors in the pre-trip planning stages. The core reason is because themed routes are, by nature, a flexible package that is perceived to be of a higher quality than other routes for tourism purposes. For tourism themed routes to achieve success, ongoing cooperation of the transport authorities, map providers, industry and government is required along the route to reassure visitors of an integrated delivery of the tourism product. Pre-trip planning information on themed routes also delivers important safety information, encourages frequent stops, and promotes exploring side routes and more remote areas off the beaten track.

En-route information

Once the visitor is reassured of the reliability of the route in pre-trip planning, and chooses a path, that reassurance must be maintained en-route. As stated previously, the unique aspect of the drive market is the flexibility for people to change or alter their itinerary en-route. The research undertaken by Millward Brown (2000) highlights the importance of maps, road signage and visitor information centres in creating a sense of reassurance needed to explore regions and ensure drivers are well prepared for decisions to improve overall (Olsen, 2003).

The “Drive Tourism Plan” produced by the Queensland Department of Main Roads (2001) provides examples of the blue and yellow italicised ‘i’ signs which have been introduced in Australia to denote quality visitor information centres that are staffed and provide a full range of services, such as weather and road conditions, electronic booking facilities, parking, a full range of tourism brochures (both local and further a field) during a reasonable range of business hours. Eligible centres must apply to Tourism Queensland for accreditation and must comply with certain provisions and demonstrate business sustainability via a business plan. These centres play a vital role in as regional/local disseminators of information. Tourism Queensland approved approximately 40 information centres across the State of Queensland.

3.2.4 The Queensland Heritage Trails Network Programme

The Queensland Heritage Trails Network is a joint initiative of the Queensland Government and the Commonwealth Government and was launched in 2000 – through the Federation Fund – to provide a lasting legacy to the Centenary of Federation. The AU\$110million Queensland Heritage Trails Network programme is an Australian first, funded through the Queensland and Commonwealth Governments in partnership with local government authorities and local communities (QHTN, 2006).

An additional AU\$3 million has been invested in funding more than 60 small grants through the Cultural Tourism Incentive Programme. The Cultural Tourism Incentive Programme (CTIP) is a Queensland Government initiative which is designed to provide grants between AU\$5 000 and AU\$100 000 for projects that advance the aims of the Network in regard to conservation of heritage, regional community development, employment and cultural tourism opportunities (QHTN, 2000).

These projects include a wide range of conservation and interpretation projects which add to the quality and diversity of the 43 major cultural attractions, originally selected by the programme. The QHTN supports projects that add to the quality, diversity and understanding

of Queensland's cultural heritage. In order to secure funding, applicants are required to partner with their Local Government Authority to demonstrate the projects' regional tourism and economic benefits.

The QHTN concept is designed to collectively develop and market the State's cultural heritage attractions within a particular region which would not have come to fruition through private-sector investment alone. The concept brings to life stories, legends, evidence of incredible feats, epic events in history, indigenous cultures, rich landscapes, colourful tales and characters that have shaped Queensland (QHTN, 2000). The programme links together 43 authentic heritage experiences, such as the new Qantas Founders Outback Museum, making it easier for visitors to discover more of the Australia's unique history, culture and natural wonders (QHTN, 2000). Overall, the aim of the concept is to create jobs and to increase awareness and capacity through educational programmes as well as to deliver economic benefits for local communities through increased tourism demand.

At each attraction, history comes to life through multi-media, interactive displays, exhibitions and hands-on experiences. The attractions cover a variety of niches and interests such as pioneering feats, pastoral, mining, wool and railway industries, ancient dinosaur relics and aboriginal legends that add a new dimension to the Queensland tourism product offering.

The Queensland Heritage Trails Network is the only major rural and regional project which is funded through the Centenary of Federation initiative and encompasses 27 communities across Queensland. The establishment of the Network represents a major cultural heritage initiative of the Queensland Government, working in partnership with the Commonwealth Government and regional communities throughout the State (QHTN, 2006).

The Network aims to preserve and promote the State's natural, indigenous and cultural heritage and develop educational resources, create jobs, stimulate development and foster tourism. Arts, culture and tourism have become important vehicles for reconstructing the external image of rural towns, stimulating physical and environmental renewal and attracting investment in new industries.

The community benefits of the Network approach are several and include:

- Building long-term sustainability of heritage projects in relation to the economic and cultural values they represent to the communities that have responsibility for each Network project;
- Using collaboration and partnerships to afford resource sharing, savings and greater audience reach;

- Utilising community expertise and support in development of the Network, leading to sustainable jobs and diverse tourism opportunities;
- Empowering communities to take ownership of their projects to showcase their rich heritage;
- Preserving, interpreting and telling the story of a place and the people who occupied it reinforcing regional and local identity, thereby providing an important element of community stability;
- Enhancing the preservation and interpretation of the State's cultural heritage by utilising the creative and educational possibilities of new media and exhibition design to provide a sensitive context for artefacts, images and stories that will lead visitors to think and search further;
- Creating employment opportunities in regional centres through the development of cultural heritage tourism;
- Diversifying the economic base of regions;
- Developing and retaining specialist trade/skills in regional areas that enhance the cultural heritage value of destinations (tourism management, conservation skills, hospitality skills, commercial and retailing, accommodation and new product development); and
- Developing training programs for cultural heritage workers (QHTN, 2006).

It is argued that the creation of the Network will have the following institutional benefits, *inter alia*;

- Integrate places and sites into a marketable network for tourism;
- Enable the preservation of a wide spread of historic sites and places through application of essential capital works;
- Provide for the maintenance of heritage places, which are currently redundant in terms of their former uses, by introducing new uses which highlight the history of the place for current community needs such as the Ipswich Global Arts Link; and
- Link other government initiatives, such as the Museums Resource Centre partnerships between Arts Queensland and local government consortia; the Cultural Tourism Strategy and the Self-Drive Strategies of Tourism Queensland; and the programmes of the National Heritage Trust and the Environmental Protection Agency to deliver more effective cultural heritage outcomes (QHTN, 2006).

One of the principles of the Queensland Heritage Trails Network is that each project will present and link to the indigenous heritage of the region. In keeping with this principle, all events, publicity and promotional material should include reference to the project's indigenous content and in doing so the following guidelines should be followed:

- Identify the Traditional Custodians of the region;
- Acknowledge the Traditional Aboriginal and Torres Strait Islander Custodians of the region;
- Be sensitive to issues regarding past history;
- Be sensitive to the use of material relating to Indigenous peoples. Materials including photographs and letters may not appear sensitive to non-indigenous people;
- Ask for assistance;
- Seek approval for the inclusion of Indigenous material into the projects; and
- Acknowledge the ownership of items and stories collected (QHTN, 2000).

3.2.5 Institutional Structures

Even though the Queensland Heritage Trails are managed by QHTN and Tourism Queensland on a State level, Queensland also has 14 official recognised regional tourism associations. The regional tourism associations are not-for-profit, membership based, organisations with the responsibility to market and provide leadership in the development of tourism in the region. **Figure 3.6** shows the Australian tourism institutional framework as well as the roles and responsibilities of each organisation.

NATIONAL	DEPARTMENT OF INDUSTRY, TOURISM & RESOURCES (DITR)					Sustainable Tourism Cooperative Research Centre (STCRC) [Research Partnership] Develops knowledge & innovation for business, community and government	INDUSTRY ASSOCIATIONS (NATIONAL, STATE, SECTOR SPECIFIC) * Lobby voice - ensuring government considers the interests of tourism * Industry leadership * Industry education & training * Professional advice * Raise industry standards * Industry promotion * Networking opportunities
	Tourism Division [in DITR] Develops & implements Federal Government policy & programs	Bureau of Tourism Research (BTR) [in DITR] Provides statistics and analysis to aid government & industry decision making	Australian Tourist Commission (ATC) [Statutory Authority] Markets Australian tourism internationally	Tourism Forecasting Council (TFC) [Consultative Forum] Provides forecasts to aid government and industry decision making	See Australia [Tourism Initiative] Markets Australian tourism domestically		
STATE	DEPARTMENT OF TOURISM, FAIR TRADING & WINE INDUSTRY DEVELOPMENT (DTFTWID)						
	Growing Tourism Unit (GT) [in DTFTWID] Coordinates implementation of the Queensland Government's Strategy for Growing Tourism			Tourism Queensland (TQ) [Statutory Authority] * Markets Queensland internationally & domestically * Facilitates destination development – research, policy & industry planning * Facilitates product development & distribution * Provides advice to industry & government			
REGIONAL	REGIONAL TOURISM ORGANISATIONS (RTOs) * Provides regional marketing, leadership and development * Coordinates industry, Local Government & community destination marketing activities						
LOCAL	LOCAL GOVERNMENT AUTHORITIES (LGAs) * Provides tourism infrastructure and facilities * Facilitates and supports development and promotion of tourism		LOCAL TOURISM ORGANISATIONS (LTOs) * Aims to enhance visitor experiences * Conducts marketing activities * Liases with community, Local Government and RTOs		VISITOR INFORMATION CENTRES (VICs) * Provides current information on local attractions, activities and events * Makes reservations for visitors * Provides up-to-date advice on local travel		

Source: Tourism Queensland (2002)

Figure 3.6: Institutional Structure of the Australian Tourism Industry

On a local level, three organisations, in the form of Local Tourism Organisations (LTOs), Local Municipalities and Visitor centres ensure the smooth delivery of the visitor experience

and services. The LTOs are membership-based and consist of mostly small businesses such as bed-and-breakfast establishments. The organisation is run by board members constituted by representatives of the local municipality and the private sector in the region. LTOs generally have between 6 and 15 full time staff members depending on the size of the region. The LTOs are also responsible for the operations of visitor centres which are usually funded by local government. The LTOs receive 50 percent of its funding from local government.

LTOs demonstrate value to their members primarily, through their collective marketing efforts. According to one of the LTOs in Queensland, the South Downs Tourism Association, the additional services usually provided by LTOs include the following:

- Operation of visitor centres;
- Organisation of member workshops to harness the potential of local tourism business owners;
- Producing and distributing regional and national campaign brochures;
- Creating co-operative and advertising opportunities for member participation;
- Attending major consumer and trade shows to increase exposure of the region;
- Organising media familiarisation tours to generate editorial coverage in local, state and national publications;
- Direct mail campaigns to tour operators and wholesalers;
- Ensuring that all possible markets for the region are identified and developed to protect the long-term interests of the tourism industry;
- Sponsorship support for events;
- Booking service available at information offices; and the
- Promotion of destination and products online (South Downs Tourism Association, 2006).

South Downs Tourism Association indicated that they participate in the Regional Tourism Activity Monitor (T-Ram) which tracks the performance of tourism accommodation products on a monthly basis which assists them in marketing their destination more effectively.

As the case with most LTOs, South Downs Tourism Association funds itself through government subsidies, contribution by local authorities and membership fees. The association's membership fees are structured in four levels, namely inaugural, regional, executive and corporate, with annual fees starting from AU\$250 increasing to AU\$545 per annum. Membership fees only cover less than one-third of all of expenses (South Downs Tourism Association, 2006).

South Downs Tourism Association plays an important role in the marketing and promotion of the Queensland Heritage Trails as well as the exploration of heritage development opportunities on a local level. Based around the idea of “our past is our future” the association embarked on a project to look for new tourism markets. In 1999, the association launched the “Cultural Heritage and Historic Building Trail Touring Guide”, presenting quality information and photographs of the region’s places of heritage. The aim of the guide was to create an appeal for authentic cultural and natural heritage and encourage people to stay the region for longer and visit more attractions. The association worked alongside heritage advisers to ensure that the information was presented correctly and in an interesting fashion.

Following the media and concerted promotion, the guide was an instant success and resulted in an increase in visitor numbers by about 30 percent. The increase in visitors had a positive effect on the local economy as a result of an increased spending on fuel, food and beverage and accommodation. More than 10 000 guides were distributed in 2000 (South Downs Tourism Association, 2006). Based on the success of the guide book, the QHTN approved funding for the development of six interpretive centres in the region (South Downs Tourism Association, 2006).

The guidebook has been updated since and serves as reference for local residents, researchers, students and travellers. It describes more than 500 heritage places including historic trees, state forests, national parks, lakes and dams, hotels, houses and homesteads, town halls, post offices, shops, schools, theatres, churches, cemeteries, wartime airfields, railway stations and bridges (South Downs Tourism Association, 2006).

3.2.6 Summary & Critical Success Factors

The design of the tourism routes in Queensland was informed by thorough market research of drive tourism markets which led to continued growth in visitor numbers to the region and its routes. The trails were implemented in conjunction with a heritage preservation programme designed to redirect the economic downturn in rural areas to viable alternatives. Resources in local communities were used to achieve these objectives while empowerment took place at the same time. Funding for the improvement of local tourism infrastructure was a major factor in the region’s success. Further, the programme brought about an increased cooperation across different sectors of the private sector and key role players, such as the Local Authorities, the Commonwealth Government and the Government of Queensland.

As in the case of the Camino de Santiago, the economic regeneration of rural areas played an important role. Tourism development helped address the economic downturn in poor

agricultural regions. In the case of South Downs, the local community is actively involved in shaping the diversification of the economy through the preservation and utilisation of local assets. The packaging of the region's tourism assets in the form of a guide book made a critical difference in the recognition of the area as a tourism destination.

3.3 HADRIAN'S WALL

3.3.1 Background

The final case study for analysis is Hadrian's Wall, which covers an 80 mile coast-to-coast stretch across the narrowest part of England and is considered one of northern England's greatest cultural assets. Even though Hadrian's Wall is not marketed as a tourism route it embodies great similarities to route destinations. Aspects such as the linear shape of the attraction across a vast area, a common and unique marketing theme and the fact that it is managed by a dedicated destination organisation made it suitable for the investigation under the banner of "route tourism".

Hadrian's Wall existed as a tourist attraction since the 1970s and was inscribed as a WHS in 1987 as the most complex and best preserved of the frontiers of the Roman Empire. The specific geographic boundaries of the site are based on the extent of the Wall and associated sites and ruins that are protected as scheduled monuments under the Ancient Monuments and Archaeological Areas Act of 1979 (See **Figure 3.7**).



Source: English Heritage (2001)

Figure 3.7: Map of Hadrian's Wall Heritage Site

Much of the interest and significance of the WHS lies in the interrelation of archaeology, ecology, geology and landscape, and human interaction. The site is valuable in terms of its economical, educational and cultural contribution to the surrounding region and the rest of the world. The rural area around Hadrian's Wall also contains many interesting landscape and ecological areas which are of national and international importance (English Heritage, 2001).

Even though the preservation of the site is paramount, tourism is also a significant source of employment in the area around the wall. It is considered inappropriate to introduce visitor management methods which could reduce jobs or businesses. According to the Countryside Agency (2003) the Hadrian's Wall World Heritage site plays an important role in the economic regeneration of small towns in northern Britain. Government strategies acknowledge the contribution of key employing business sectors such as tourism for rural economic development opportunities. Further, the Countryside Agency (2003) states that the distribution, hotels and restaurants sector was the largest rural employer providing 1,421 096 jobs in 2001.

One of the major challenges for the region was that the asset is spread over such a vast area with a large group of owners and interest groups posing a major threat to the effective management of the site.

3.3.2 The Management of Hadrian's Wall

The designation of the Wall as a WHS in 1987 recognised the value of the Wall and highlighted the importance of coordinated management to preserve the Wall's values. Historically, ownership and control of the territory making up the site and setting had been fragmented. In response, these initiatives created institutions and partnerships to manage the Wall and setting resources in ways that were coherent geographically and across sectors. According to the report by Economics Research Associates (ERA) (2004) the previous management structure, the Hadrian's Wall Tourism Partnership, was severely criticised by the private sector for its lack of accountability and leadership. The report further states that the partnership relied heavily on external funding sources to pay for operations and activities (ECI Africa, 2006). The Hadrian's Wall Tourism Partnership therefore had a natural tendency to work according to the agendas of donor organisations rather than the interests and objective of the Wall as a destination (ERA, 2004).

These issues have led directly to the formation of a new management and planning organisation in 2005 which is the Hadrian's Wall Trust (HWT). The trust was established as a company limited by guarantee (this means a not-for-profit company) with intended charitable status, consisting of public and private sector members and interested parties. The members of HWT are responsible for electing a suitable and effective HWT board of directors accountable for the running of the organisation on a day-to-day basis.

Hadrian's Wall is strictly managed according to a comprehensive management plan which was first produced in 1996 and updated in 2001 with consultation and assistance of an extensive list of stakeholders. The process is now underway to prepare the new

management plan for 2008 to 2013. The core significance, range of values, and general policies for the WHS are shared by all stakeholders. As expected, the values are arranged and prioritised differently by different partners as each pursues its goals within framework of the management plan.

3.3.3 Marketing of Hadrian's Wall

Hadrian's Wall is not marketed consistently across all regions of Britain. Although the main website (www.hadrians-wall.org) attempts to brand and market the region, all the individual attractions and small towns are expected to market themselves independently. Marketing activities are largely focused on leaflet production and distribution, trade shows and public relations. Similar to the Camino, Hadrian's Wall makes use of several hiking trails and cycling routes to attract visitors. The Hadrian's Wall branding and showcase of attractions are provided in **Plate 3.3**. Even though the marketing of Hadrian's Wall used to be primarily local (northern Britain) and UK-based, it was recently expanded to include global source markets such as the United States, Germany, China and South Africa. Overseas marketing is largely conducted through the "Visit Britain" publications and joint activity with the National Tourism Board at selected trade fairs.

Plate 3.3: Branding & Attractions of Hadrian's Wall World Heritage Site



Source: www.hadrians-wall.org

Although HWT makes use of websites as well as regular exposure in the media (national television and magazines) to market the region, the overall marketing concept is still perceived by private sector groups to be “too loose” and undefined. According to the regional councils operating in the area, umbrella marketing, presenting the destination in its entirety, was felt it would have a greater impact on visitation than if each of the museums and visitor attractions marketed themselves individually. It was also felt that such marketing will enable the sites to reach a broader audience. This was particularly the case for locations where the scale of the individual sites included some very small sites, not able to afford to effectively market themselves.

3.3.4 Visitor Demand

Visitor numbers and occupancy rates of accommodation establishment in the region increased significantly following the opening of the Hadrian’s Wall Path National Trail in May 2003. The development of the trail was a joint venture between the Countryside Agency, Hadrian’s Wall Tourism Partnership, English Heritage and Tynedale, Northumberland and Cumbria County Councils. As a result of a successful marketing campaign, HWTP indicated that approximately 700 people walked the trail from coast to coast in the first four weeks after opening, spending more than a total of £100 000 in the local economy. The Countryside Agency (2003) estimated that the trail’s first season (summer of 2003) generated £3.5 million of spend in the local economy - excluding day trippers and other visitors.

In the economic impact assessment conducted by English Heritage (2003) it was estimated that there were 776 000 visitors to the Hadrian’s Wall staffed sites and trails in 2003 representing a 38% increase on the year before. Of these, 458 000 were visiting the museums and historic sites along the Wall, on average each visiting 1.3 sites. A further 31 000 visitors were estimated to be serious walkers, walking in excess of two hours (but not visiting any of the sites), and 287 000 were estimated to be general sightseers visiting the area. The economic report further indicated that the Wall supported 750 small and medium-size enterprises and employed about 6 000 people directly in the tourism industry in 2003. Of the 4,3 million people that reside within 80 miles drive of the length of Hadrian’s Wall, a total of 983 000 are directly affected by the economic returns generated through tourism.

The 2003 Visitor Audit provides data on the profile of visitors to Hadrian’s Wall. About 10 percent of visitors to the central area of Hadrian’s Wall are from overseas. It was revealed that 36 percent are day visitors, while 64 percent stay overnight. According to the audit report, visitors to Hadrian’s Wall can be divided into three main segments, visitors to the heritage sites and museums connected to the Wall, walkers and cyclists along the line of the Wall, and general sightseeing visitors. There is a degree of cross-over between the

segments, with, for example, a proportion of walkers, making visits to heritage sites and museums during their walk (ERA, 2004).

Compared to the profile of the UK population as a whole, visitors to Hadrian’s Wall tend to be older, with 27 percent aged 55 or older. Just less than one-third of all visitors researched brought children with them, although this falls to below one-quarter for serious walkers. Less than two-thirds of visitors were staying overnight away from home. Of these, more than half were visiting areas within 10 miles of the line of the Wall, with the remainder also visiting other areas during their trip. Serious walkers were more likely to be staying over than visitor to attractions, this represented 77 percent compared to 69 percent, respectively. Not surprisingly, they were also more likely than attraction visitors to be concentrating their activities in the area around the Wall (ERA, 2004).

Overall, it was disclosed that more than 40 percent of visitors were on their first visit to the Hadrian’s Wall area, while a quarter of all visitors had made more than five previous trips to the area. **Table 3.3** sets out attendance levels at the main museums and historic sites associated with Hadrian’s Wall, over the past four years. In total, just less than 583 000 visits are estimated to have been made to the 11 sites in 2003, a 4 percent growth on 2002. This growth, which occurred across the majority of sites, is attributed to expanded publicity on the Wall relating to the launch of the National Trail in May 2003 and particularly fine weather throughout the spring, summer and autumn months benefiting the largely outdoor sites (ERA, 2004).

Table 3.3: Annual Attendance to Hadrian Wall’s Main Sites (2000-2003)

	Visitors ('000)			
	2000	2001	2002	2003
North West Sites				
Senhouse, Maryport	6.2	7.9	6.5	6.7
Tullie House, Carlisle	40.1	48.9	47.5	32.9
Birdoswald	36.7	31.1	35.4	39
North East Sites				
Roman Army Museum	45.9	37.8	45.7	52
Vindolanda	70.8	66.2	78.8	87
Housesteads	110.2	12.4	106.4	115.4
Chesters	69.8	58.2	61.5	64.5
Corbridge	20.3	16.6	21	16.5
Museum of Antiquities	15.8	15.5	17.7	18.9
Segedunum	43.3	60.7	44.3	50.5
Arbeia	78.5	99.4	97.9	99.7
Overall Total	537.4	454.6	562.6	583.1

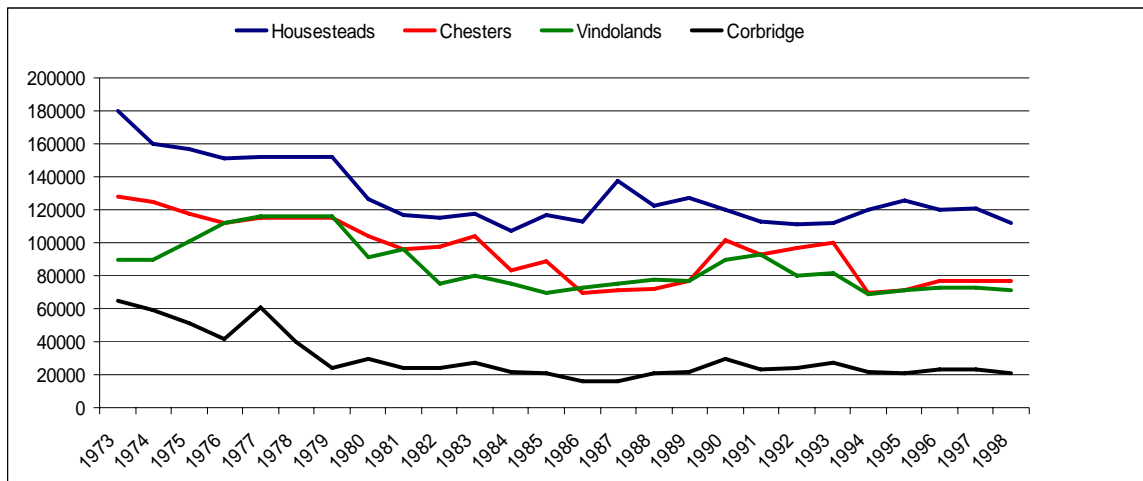
Source: ERA (2004)

Tullie House and Corbridge were the only two sites to report a decline in visitors during 2003 (see **Table 3.3**). In the case of Tullie House, the HWTP reported that this is attributed to an increase in admission price, the competing display of the Roman Finds (excavated from beneath Tullie House) at the nearby Castle Museum and losing out to outdoor attractions during the summer months. The Corbridge site is believed to have suffered due to being away from the line of the Wall (ERA, 2004).

According to the ERA (2004), the accommodation sector in the region consists of approximately 400 products of which 23 percent are hotels, 19 percent guesthouses, 7 percent farmstays, 6 percent campsites, 3 percent hostels and 43 percent self-catering accommodation. The area roughly has 15 000 beds and a 100 campsites and achieved room occupancies of about 55 percent in 2003 (ERA, 2004).

3.3.5 Tourism Infrastructure Requirements

Although visitor numbers were on the increase during the 1990s, this was not the case in the late 1980s. **Figure 3.8** shows some longer-term visitor trends to the Wall. The numbers of visitors to the forts and museums shown to have declined since the 1970s; 392 556 in 1973 to 250 687 in 2000 – a decline of 36 percent (English Heritage, 2003).



Source: English Heritage (2003)

Figure 3.8: Long-Term Visitor Trends to the Main Attractions of Hadrian's Wall WHS

During that phase there was a concern that if no action was taken to improve the Hadrian's Wall visitor experience, then the number of people visiting the area would further decline. The HWTP recognised that, with the pattern that has been experienced in the past, investment in tourism product was required to turn the situation around. Accordingly, HWTP

commissioned an economic impact study which included an investigation on the reasons for the visitor decline and the potential markets that the Wall could attract with significant investment in product development (ERA (2004).

The results of the investigation showed that the expectations amongst those that visited the Wall sites, were modest (ERA, 2004). With low expectations among visitors the actual experience was perceived fairly positively. Nevertheless, it was seen to be an experience that is “what you make of it”, requiring a high level of effort from the visitor and was not seen to have the sort of “wow” factor that leads to recommendations to friends and family. Generally, the standard of interpretation at the sites was seen to be poor, with little effort being made to link the sites together within the context of the bigger Hadrian’s Wall story. Sites that have invested in interactive forms of interpretation, such as Segedunum, were positively viewed for their ability to bring the story to life; however most sites were seen as being “rather tired”. The lack of any focal point to help visitors understand how and where to access the Wall experience was a major barrier to attracting new visitors (ERA, 2004).

The report by ERA (2004) further revealed that traffic signage has been developed in a piecemeal fashion over the years as development of Hadrian’s Wall sites has taken place. There were a number of locations where the proliferation of signs is such that much of the information being conveyed to drivers and others was both confusing and overcomplicated. The general quality of signs was said to be lower that should be expected in one of Britain’s premier tourist attraction destinations (ERA, 2004).

Throughout the stakeholder consultation process a recurring issue has been the concern that there would not be sufficient infrastructure to accommodate increased visitor interest in Hadrian’s Wall. In these discussions the definition of infrastructure was not the conventional one of road and rail capacity, but rather of specific tourism infrastructure, much of which is typically delivered, or not, by the private sector. The areas of infrastructure inefficiency were as follows:

- Accommodation of all types and price points. In particular, the serviced sector, in the form of more quality hotels, guesthouses and B&Bs, hostels for organised groups, campsites for some of the walkers, and hotels large enough to accommodate coach parties;
- The lack of availability of shops, food and beverage outlets and petrol stations generally, and the fact that those that exist do not always trade at hours convenient to tourists;
- The lack of range, and in particular of quality, in the retail and catering sectors;
- Ablutions available for public use; and
- Car parking capacity conveniently located for visitors (ERA, 2004).

The calculation of the demand potential of the Wall showed that it has the ability to attract 9,2 million visitors (available market demand) mainly consisting of surrounding residents which can generate 4,3 million visitors per year, as well as domestic and international tourists adding up to 4,9 million per year. Based on these studies, the HWTP further commissioned a product development strategy for the Wall. The strategy looked at key investment required to create a renewed public interest in the rich cultural history that Hadrian's Wall represents and inspire visitors to return in larger numbers than ever before. To accomplish this, the key elements of the product development strategy contained the use of the most powerful tool in "edutainment" namely that of storytelling (ERA, 2004).

The product development strategy recommended that the development of Hadrian's Wall be done over five phases (period of 10 years) containing:

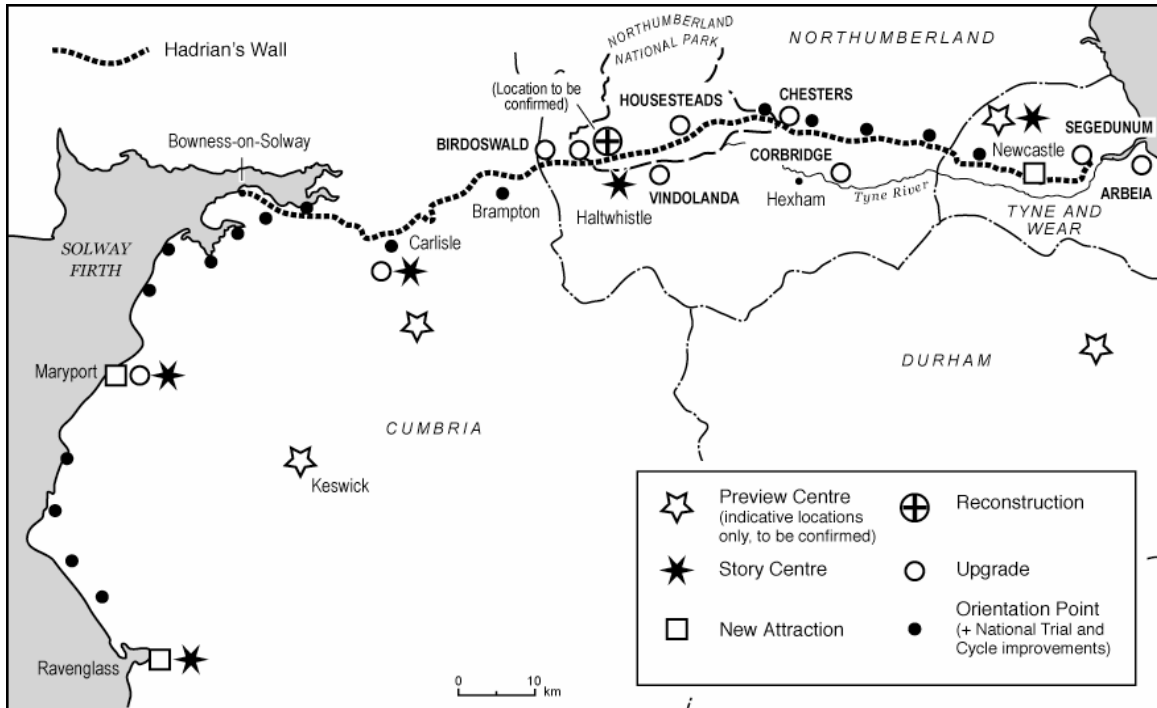
- £ 31 million for new attractions;
- £ 14 million for upgrading of existing attractions; and
- £ 6,5 million for signage, marketing (pre-launch and branding), visitor information centres, site interpretation and walking trails and cycle paths (ERA, 2004).

A total capital investment of £51,5 million was required to realise the strategy. Additional funding will be required for the day to day running of the site. A total annual budget of £3,1 million was proposed to cover:

- £ 1 million for marketing;
- £ 1 million for administration and management;
- £ 1,1 maintenance and transportation (ERA, 2004).

Main sources of funding for the first phases of development came from the UK Lottery Fund, UNESCO and the EU. **Figure 3.9** shows a map of the region and the product development proposals that were made to adequately serve the tourism market. Based on economic impact assessment for Hadrian's Wall, the investment is projected to double the visitor expenditure in 10 years from the time of investment (ERA, 2004).

In addition to the infrastructure developments proposed for Hadrian's Wall, regional councils such as Tyndale raised funds for the upgrading and improvement of tourism infrastructure in key tourist towns such as Hexham, Prudhoe and Haltwhistle. According to the Hadrian's Wall Tourism Partnership (2003) an estimated £2,4 million were allocated for the regeneration of small towns. The development programme included, amongst others, the development of hiking trails, visitor centres, upgrading of historical attractions and the improvement of shop fronts in key tourist areas.



Source: ERA (2004)

Figure 3.9: Visual Layout of the Product Development Strategy for Hadrian's Wall

3.3.6 Summary & Critical success factors

It is critical to observe that Hadrian's Wall's World Heritage Site status did not necessarily mean guaranteed success. The quality of visitor centres played an important role in the attractiveness of the region. In addition, the diversification of products supply to include hiking and cycling trails added considerable value in terms of drawing visitor numbers. For successful route tourism, further observation from the research on the Hadrian's Wall case study was the ability of stakeholders and management to recognise and change a downward trend in visitor numbers by conducting proper research and secure significant investment funding to ensure the future growth and economic benefits of the region.

The importance of holistic planning is highlighted by the management plan and strategic product development plan that was done for the region which led to a clear understanding of the market potential and major investments requirements that would lead to the success of the destination. Although inclusive, the original organisational structure was too large and inefficient to deal with the intricacies of the day-to-day management of the destination. A smaller management group which were made accountable to a larger group of stakeholders proved to be a much more robust management structure for the region. The research suggests that tourism management organisations should have a healthy mix of private,

public and donor funding to ensure the development of sustainable tourism destinations. Dependency on donor funding may lead to a loss of focus and inefficient management systems.

3.4 CONCLUSION

Overall, the international case studies of Chapter 3 build on the strategic policy on route development by Meyer in Chapter 2. The international research strengthens the case for a well-balanced management structure, including both public and private sector, as a fundamental for a route to become successful. Further, the research showed that significant funding was secured for the conceptualisation and development of key tourism infrastructure as well as the ongoing management and marketing was found to be consistent throughout the case studies of international routes. It was found that all three routes were largely dependent on a significant local and/or regional tourism demand. For all three routes local economic development and cultural preservation were the primary motivation for establishment.

In Chapter Four an analysis of the development and workings of the Midlands Meander provides further light on the key success factors that impact upon route tourism from a South African perspective.

CHAPTER 4:

MARKET RESEARCH: THE MIDLANDS MEANDER, SOUTH AFRICA

The analysis and investigations on route tourism continue in this chapter to include a case study of a successful and well-known South African route, namely the Midlands Meander. The section provides an in-depth analysis of products and consumers in the region with the purpose of identifying the key success factors of the Midlands Meander from a South African perspective. In addition the chapter seeks to provide a comparison with earlier enterprise studies in the region by Mathfield (2000) highlighting similarities and trends in the development of the region. The section concludes with a detailed analysis of the Midlands Meander Association.

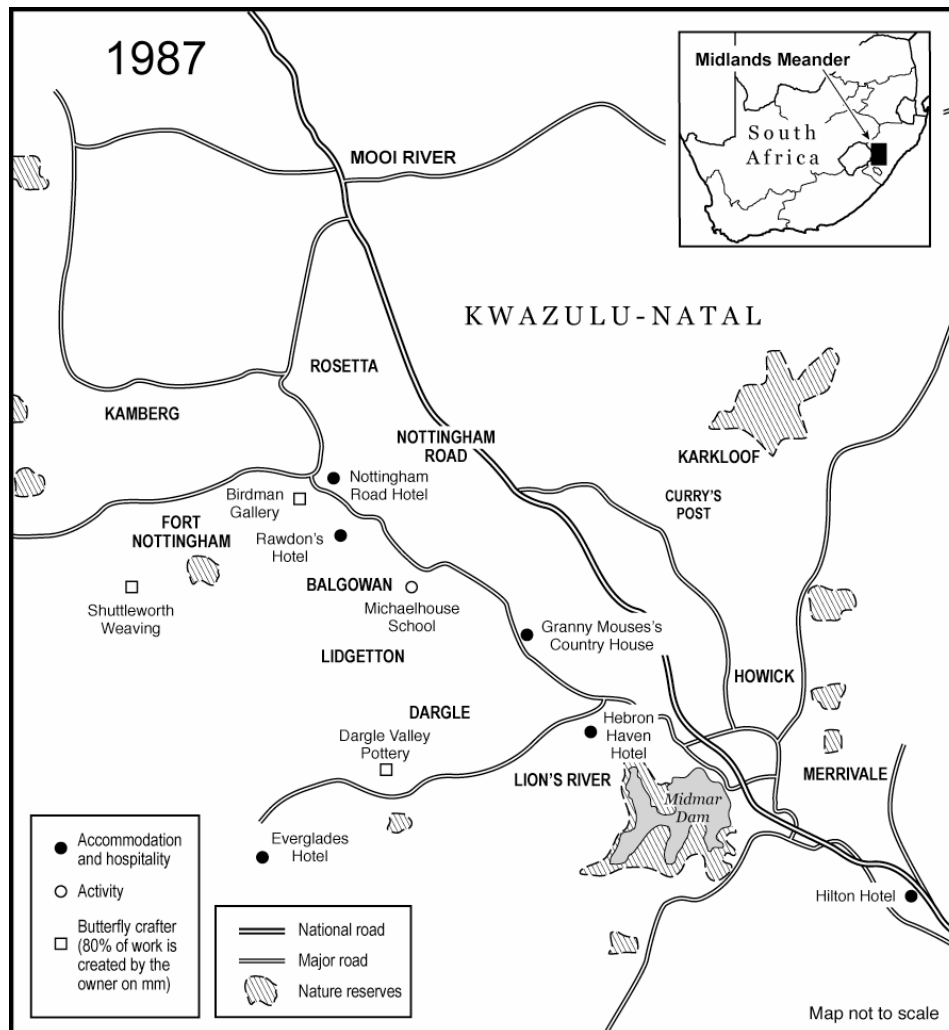
4.1 BACKGROUND AND ORIGIN OF THE MIDLANDS MEANDER

The Midlands Meander is a route tourism destination with its core product offering being arts and crafts, agricultural produce and a scenic rural environment (Mathfield, 2000). As shown in **Figure 4.1**, the route is located in KwaZulu-Natal province, South Africa, with its geographic boundaries extending from Hilton in the south to Mooi River in the north (approximately 70 kilometres) and in the west, about 40 kilometres to central Drakensberg and 30 kilometres east towards Curry's Post and the Karlkloof indigenous forest. Midlands Meander Association (MMA) is one of very few successful private sector driven and funded destination management organisations in South Africa.

4.2 TOURISM PRODUCT SURVEYS

The analysis in this section focuses on the profile of respondents and their products on offer, employment, the market demand and revenue generated by route tourism products, the profile of clientele and the impact of the association on their business. The research results are compared with a similar study undertaken by Mathfield in 2000, which revealed the

status of enterprises on the Meander at that stage as well as their economic impact on the region.



Source: Midlands Meander Association (2005)

Figure 4.1: Location of Midlands Meander: Original Products in the Area in 1987

4.2.1 Profile of Respondents and Products on Offer

A sample of 40 tourism enterprises in the Midlands Meander was surveyed. The majority of respondents were sole owners (40 percent) while 33 percent were managers and 27 percent were co-owners of the business (see **Figure 4.2**).

The majority of respondents were female (58 percent) while 60 percent of all surveyed were over 40 years of age. The research conducted by Mathfield (2000) showed a similar trend regarding the gender and age of operators; the average age of respondents to the survey in 2000 was 49, while 52 percent were female.

In terms of education, the respondents surveyed are generally well-educated. With regard to the level of education, 66 percent have completed a university degree or technical diploma, while one-third (34 percent) of respondents have only completed education at secondary level. Only eight respondents (20 percent) have appropriate qualifications in tourism management, hospitality and tour guiding. The respondents have on average 7.5 years of experience in the tourism industry.

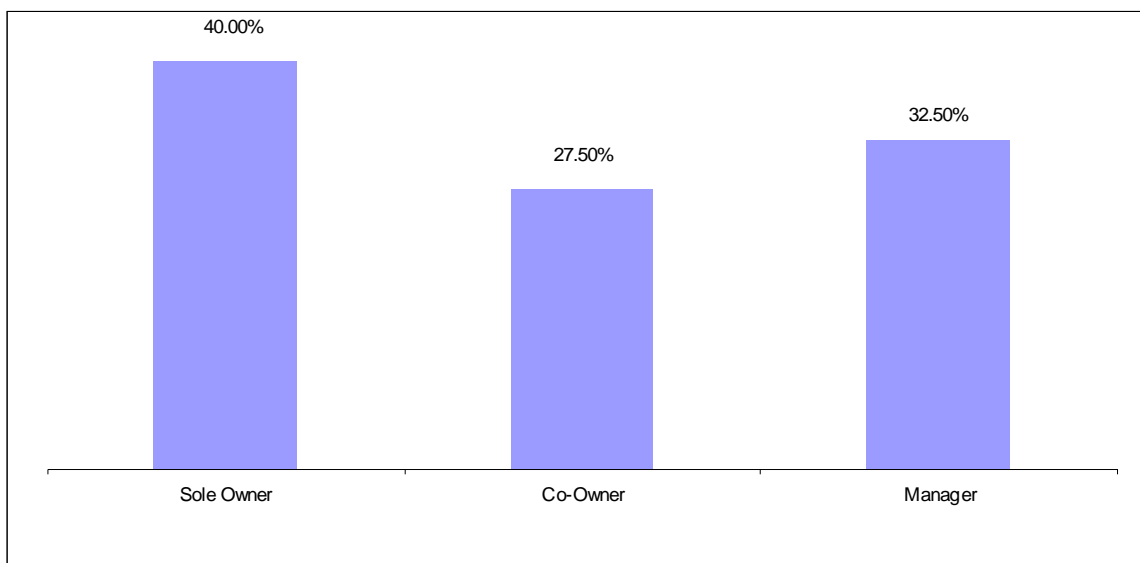


Figure 4.2: Respondents in Management Positions

The enterprises interviewed generally operate more than one tourism facility or activity. The same trend is evident in the research by Mathfield in 2000 which revealed that 73 percent of tourism enterprises were a secondary or one of multiple income streams. Mathfield (2000) further indicated that 25 respondents (63 percent) have other businesses additional to the enterprise under study. These businesses are owned by the respondents themselves or by other family members that contribute to household income. A quarter of respondents surveyed in 2000 indicated that their tourism enterprise is merely a hobby which requires little investment and running cost. This is mostly true of farming operations. This lack of motivation to succeed as a tourism product could be problematic in terms of visitor management and quality assurance.

The product facilities covered by the survey are shown graphically in **Figure 4.3**. A total of 81 facilities were covered by the 40 enterprises surveyed of which the majority were

accommodation establishments and arts and craft outlets. Small numbers of agri-tourism, adventure, tour services and conference/wedding facilities also formed part of the survey. Since the survey by Mathfield (2000) the product offering in the region has diversified from primarily arts and craft outlets and accommodation to include the categories mentioned above. In 2000, 22 of the respondents were running arts, crafts and other retail outlets, while 17 were accommodation establishments.

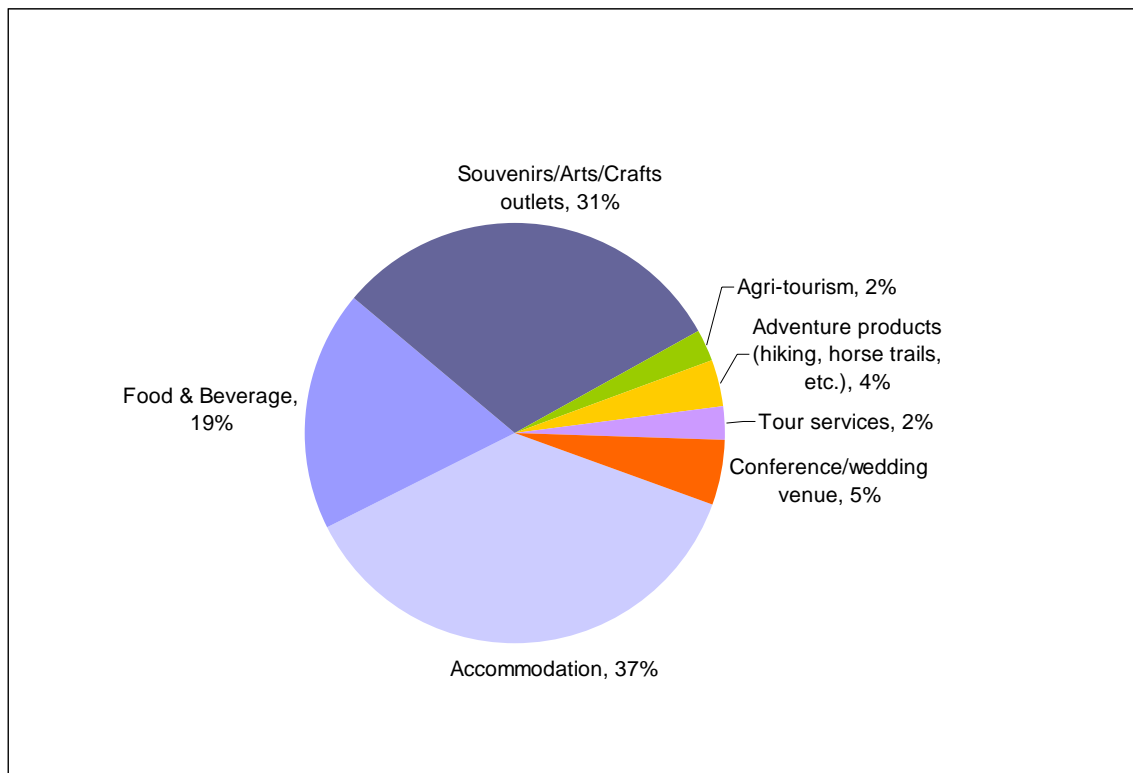


Figure 4.3: Range of Tourism Products Covered by the Survey

It was found that the Meander experienced an increase in the proportion of new tourism enterprises amongst those surveyed; 15 percent are younger than a year, while 35 percent are less than 5 years old. However, half of those interviewed are established businesses of 5 years and older (see **Figure 4.4**).

In terms of operational structures, the survey showed that 62 percent of enterprises are family businesses, while 14 percent are registered sole proprietors and 24 percent are private companies. According to Mathfield's survey in 2000, 85 percent of respondents were owner operators in 2000, while 8 percent were owned by corporations. The larger proportion of registered companies in the recent survey might indicate growth and maturity of enterprises. It might also indicate a growth in investment by experienced business operators.

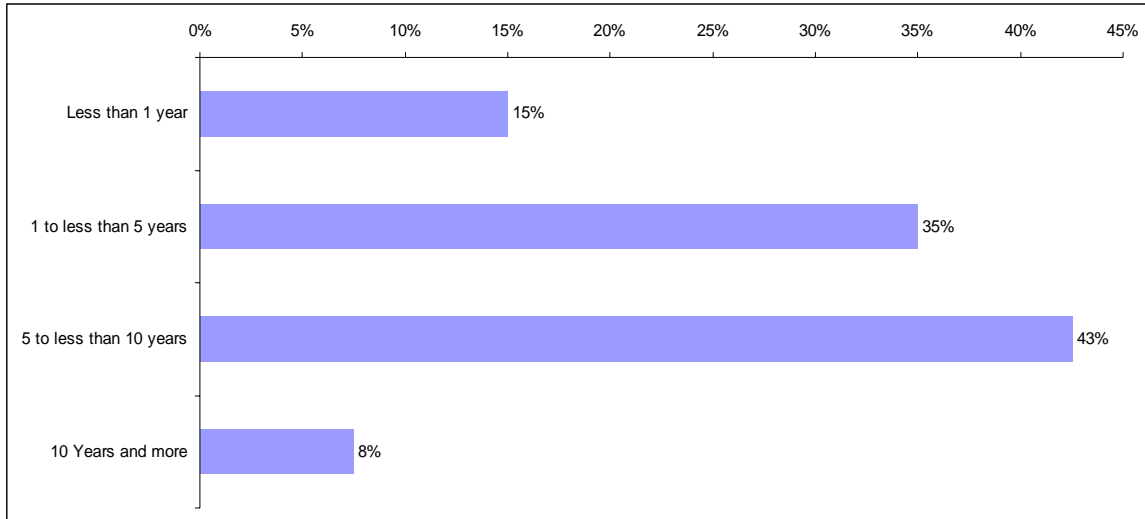


Figure 4.4: Period of Operation

Concerning start-up capital for businesses, of the 24 responses received, 42 percent indicated that they have used their retirement funds or savings to start the business, while 29 percent made use of a bank loan to finance their capital requirements. Small proportions of enterprises indicated that they used government or donor grants to establish their businesses.

Mathfields (2000) survey indicated that the majority of enterprises (68 percent) were self-funded. The rest obtained their start-up finance either from a bank loan (8 percent) or from a retirement package (3 percent) or from a combination of the above (23 percent). Mathfield (2000) further indicated that the motivation for starting businesses in the Midlands Meander were primarily for two reasons. For the majority (68 percent) the prospect of a better quality of life in the country as opposed to the city was the driving force. A small portion (15 percent) indicated that their primary objective is to make a profit. As mentioned earlier, a further 30 percent of respondents began their business to keep themselves occupied or as a hobby. The majority of enterprises on the Meander were started for non-economic reasons or lifestyle considerations.

4.2.2 Employment

A total of 331 people are employed in 35 businesses surveyed. Five enterprises in the survey were artists with no employees. Full-time staff totals 298 people while there are 33 part-time employees. A large proportion of employees (47 percent) have no experience and no qualifications, while 32 percent have some experience but no qualifications. Respondents in the survey employ between 1 and 180 workers. The employment ratio per establishment is 1:9.4. The survey by Mathfield (2000) indicated that a total of 272 people

were employed in 30 businesses indicating that the employment ratio per establishment was 1:9. The employment per establishment has therefore increased slightly from 1:9 to 1:9.4.

Mathfield's (2000) analysis by sector (accommodation and arts and craft outlets) revealed that the employment ratio of the sectors is 53:47 (n=140:126), suggesting that arts and crafts enterprises provide somewhat fewer direct employment opportunities than accommodation enterprises.

In terms of skills, Mathfield (2000) indicated that 60 percent of the work force was skilled or semi-skilled in 2000, while 30 percent were unskilled. This is startling different to the current situation where the majority of employees are unskilled. Mathfield (2000) further highlighted the fact that the lack of skilled labour in the area placed a hindrance on the growth of businesses on the Midlands Meander. Respondents to the 2000 survey particularly highlighted the difficulty in locating skilled labour and the high costs associated with training largely unskilled labour.

4.2.3 Market Demand and Revenue

The majority of tourism establishments on the Meander route are small and focused on personalised services. The average size of accommodation establishments is 12 beds, while the average number of seats in restaurants is 32. The average size of conference facilities in the survey is 41 delegates, while the largest venue can accommodate 100 guests and the smallest venue, 8 delegates.

The survey shows that the tourism market demand for the Meander is seasonal and corresponds to school holidays, indicating that the area is mostly attracting the domestic leisure market. **Figure 4.5** shows that 48 percent of all demand for the Meander occurs between the months of November and February. Given the fact that the main market for the Meander is domestic leisure it is surprising that the seasonality is not as severe as other holiday destinations where demand in low seasons can drop as low as 5 percent. The fact that the Midlands Meander Association organises events throughout the year contributes towards the reduced effect of seasonality on tourism establishments. The graph also shows an increase in demand between the months of May and July which coincides with the Midlands Meander Creative Festival. This event will be running for its fourth year in July 2007.

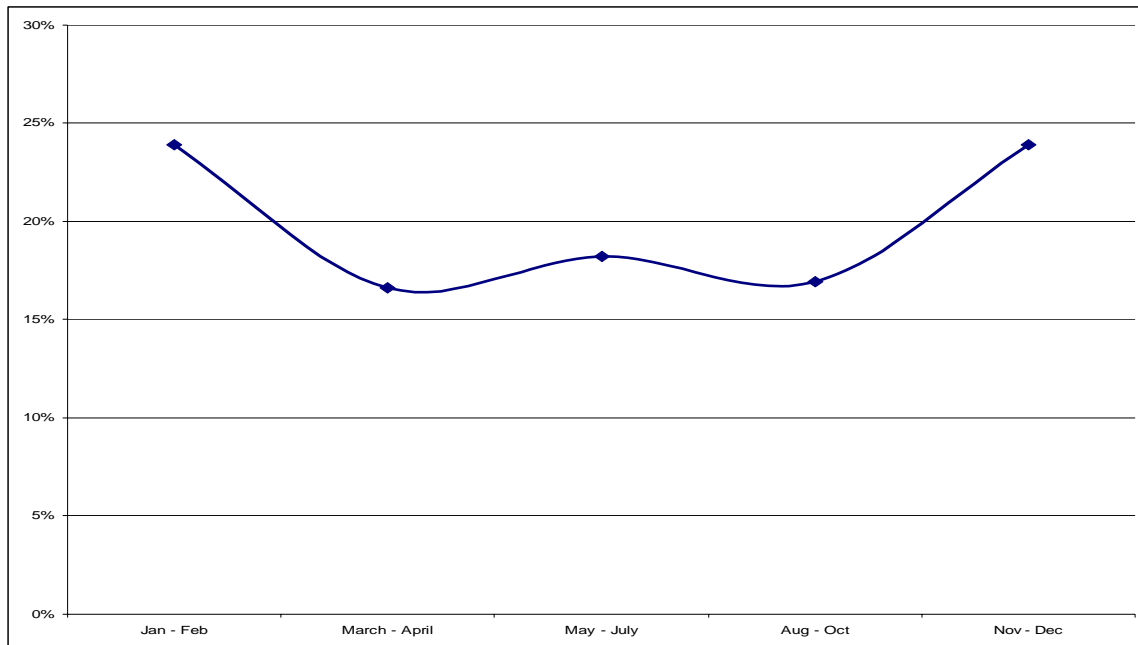


Figure 4.5: Seasonality of Demand for Midlands Meander Route (Percentage of Total Demand)

The research by Mathfield (2000) confirmed the seasonality trends shown above with the months of December, January and April representing the peak season. However, the months of May, June and July constituted the low-seasonal period for most respondents in the 2000 survey by Mathfield. The increase in visitors during the May to July period in the recent survey confirms the important role of events in reducing the effect of seasonality.

In order to calculate the revenue generated by tourism enterprises on the Meander, respondents were asked to provide their rates for tourism facilities as well as the number of visitors received annually.

Overnight rates for accommodation establishments in the survey range between R100 and R1800 per person per night sharing. Takings per cover at food and beverage outlets range between R40 and R145. The average rate of adventure activities on the Meander is R277. Conference and wedding services are mostly priced according to the type of meals included in the event and can range between R120 and R350 per person per day. The revenue generated by arts and craft outlets varies depending on the type of products sold. The average price of art and craft works sold by enterprises in the survey is R125. The visitor numbers to art and craft enterprises are not directly linked to sales; therefore the revenues were calculated by number of product sales per enterprise per annum. The average number of art and craft units sold by the enterprises per annum is 4 678.

6 shows the average number of visitors received annually by each type of product. Souvenirs, arts and craft outlets received the highest number of visitors, it is an average of 23 388 per outlet. Visitors attracted by these establishments are exponentially higher when compared to other products such as adventure operators, accommodation and wedding venues.

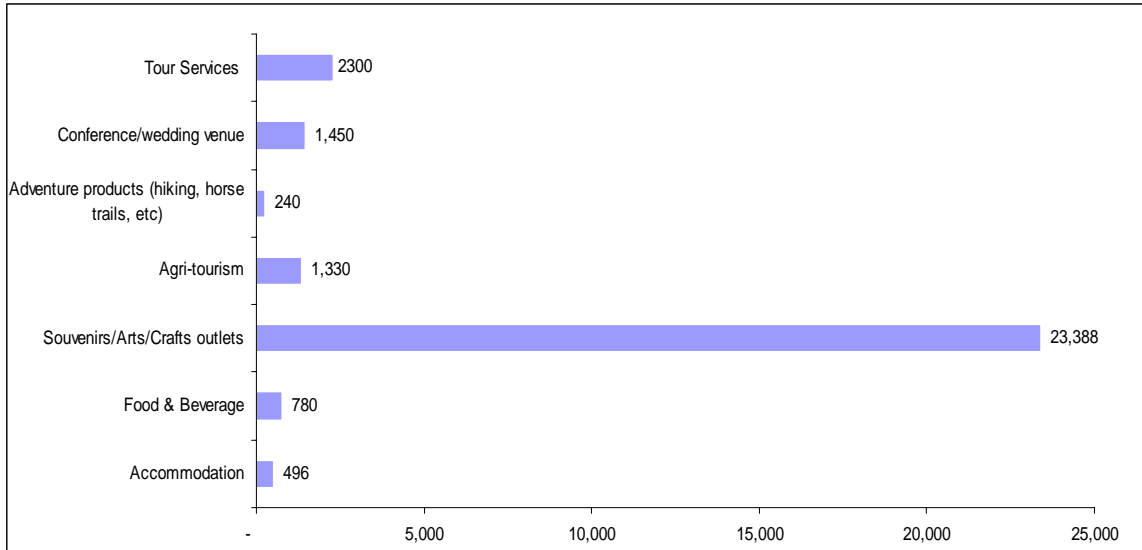


Figure 4.6: Average Number of Visitors Received Annually by Facility Type

This is an important finding and may assist other destinations to understand the relationship between draw-cards and visitor demand. Attractions such as arts and craft establishments have a high pull factor and play an important role in the success of the Midlands Meander route. There are currently over 40 artists and crafters living in the Meander area and it becomes an increasingly popular area for artists to settle.

The gross income data for the 40 enterprises in the survey were calculated by utilising the tourism patronage levels and average rates by each type of product. The gross annual income of the enterprises under study is R45, 9 million or R3,8 million per month.

The study by Mathfield (2000) revealed that the gross monthly income for 37 enterprises collectively was R2,1 million in 2000. Gross incomes ranged from R1,000 to R350,000, with an average of R54 121 and median gross income of R16,667 per month. In 2006, the value of revenues generated by the 37 responding enterprises would have been worth just under R3 million if inflation was taken in consideration. It is therefore suggested that the ability of enterprises to generate revenue has increased by roughly 18 percent over the past six years due to the growth in tourism markets. The study by Mathfield (2000) further suggested that arts and craft enterprises generated significantly higher revenues than accommodation establishments. The survey revealed that the average arts and craft enterprise generated

R72 800 per month, while the average accommodation establishment generated R47 800 per month in 2000.

4.2.4 Tourism Markets

Respondents were asked about the particular niche markets they receive at their establishments. As shown in **Figure 4.7** the majority of guests visiting those in the sample have a particular interest in food and wine (60 percent), cultural products (51 percent), health (50 percent) and nature based tourism (43 percent).

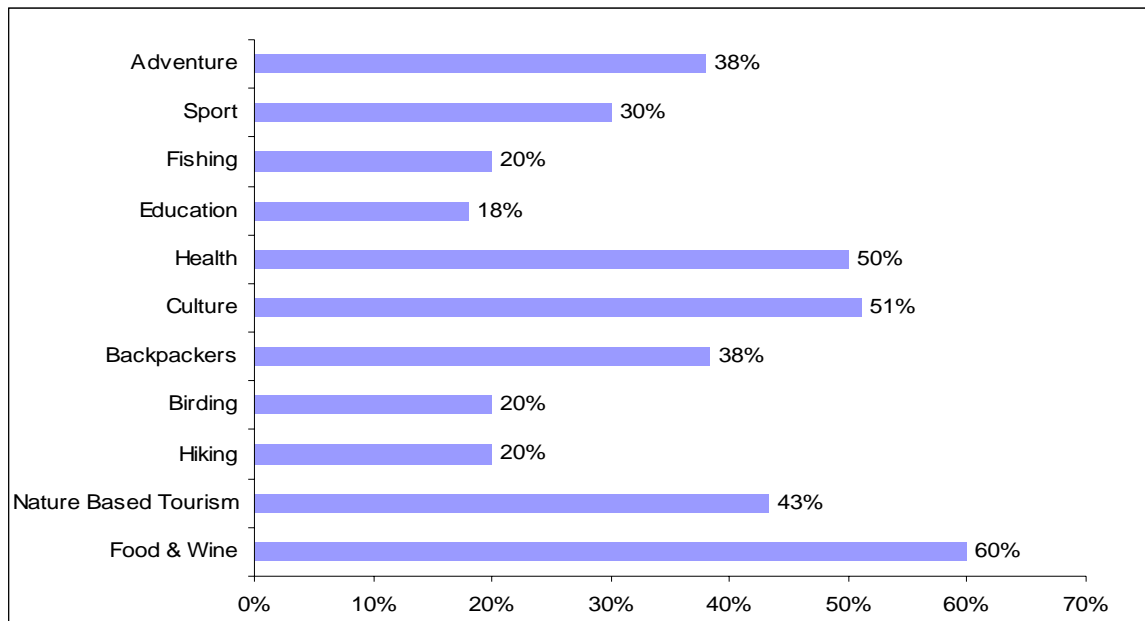


Figure 4.7: Niche Market Segments on the Meander

According to respondents, on average 63 percent of their guests are South African, while the remaining 37 percent are from Western European countries such as the UK, Germany, France, Belgium and the Netherlands. Of the South Africans received, just over half are from KwaZulu-Natal (within a distance of ± 200 kilometers), while the rest is derived from Gauteng (within a distance of ± 500 kilometers).

Foreign visitors stay on average 3.8 nights while domestic travelers stay on average 2.5 nights. The survey shows that leisure visitors make up the largest proportion (75 percent) of guests, while business visitors (mostly conferencing) represent 18 percent and educational markets 4 percent.

The visitor profiles received of the enterprises in the survey are mostly couples, family and friends in groups of 2 to 4 (66 percent). The study by Mathfield (2000) confirmed the large

proportion of the family market attracted to the Meander but suggested that the Meander received very little tour groups in 2000; only 2 out of 40 enterprises received tour groups in 2000. The survey results indicate a change in trends with the Meander establishments receiving an increasing number of tour groups. It was found that on average 16 percent of clientele are travelling in tour groups, while on average 10 percent of the guests are conference delegates with group sizes of 40 people, on average (see 8).

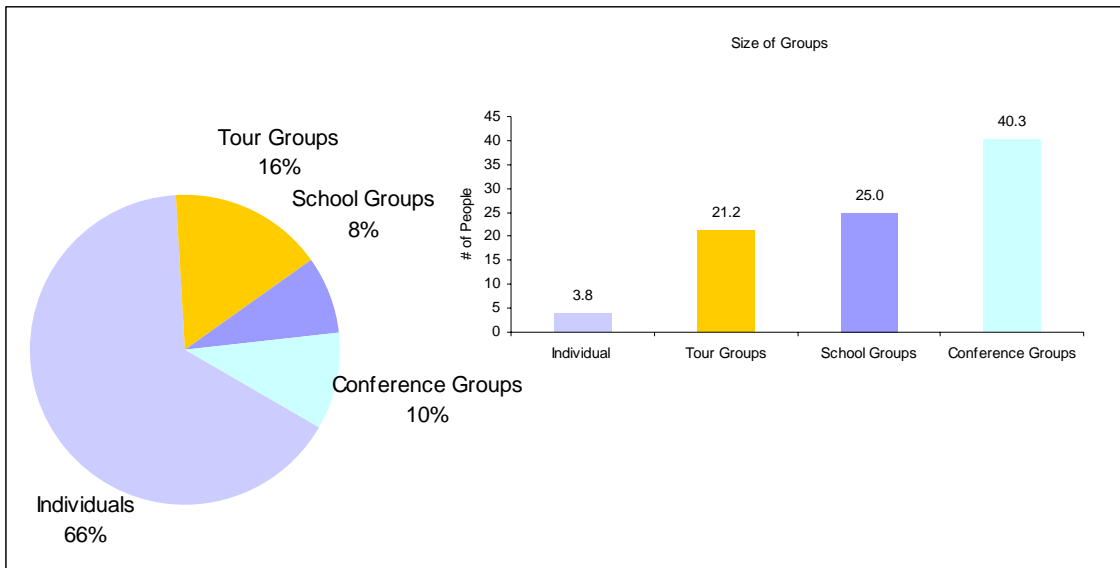


Figure 4.8: Visitor Profiles: Type and Size of Groups

The Meander establishments are starting to diversify its markets from individuals (family and friends) to tour groups, school and conference groups. The results suggest that products on a route should be suitable for a range of different markets to ensure the long term sustainability of the local tourism economy.

4.2.5 Impact of the Midlands Meander Association

It was found that 90 percent of the respondents belong to the Midlands Meander Association (MMA). Most of the establishments had to pay high joining fees (between R4 000 and R11 000) as the latest association fees are structured to encourage the development of unique products which could enhance the visitor experience. In addition annual membership fees and advertising fees are payable. The survey found that only 28 percent of the respondents felt that the association fees are too high and that it might be unaffordable for small establishments.

MMA members interviewed observed that on average 35 percent of all visitors received are directly as a result of the MMA marketing efforts. The survey showed that there is a direct correlation between the size of establishments and the dependency on the MMA marketing efforts. Smaller establishments tend to rely and benefit more, proportionally, from the joint marketing efforts, while larger establishments see it as a small part of their broader marketing plan and budget.

The majority (78 percent) of those who are members of the MMA indicated that they have benefited substantially from their membership. The survey revealed that respondents highly value the marketing function performed by the MMA and said that they receive “very good value for money”. Direct quotations from the responses received from MMA members are provided below:

“...A major success factor would be the strength of the brand and that of group marketing. The brochure is a widely recognised and desired publication, and often visitors to the area will not go to an establishment if it is not in the brochure...”

“...Route tourism has huge benefits to local tourism not just to those directly involved but to the community as a whole. I am sure that the Meander Association is directly responsible for the growth of the area as prior to the formation it (the area) was overlooked as a tourism resource...”

Another key function performed by the MMA is the provision of a collective voice for all in the community and dissemination of industry information. The MMA provides formal structures for community projects and makes it easy for volunteers to get involved. In the beginning years, the availability of free resources played a major role in formation and growth of the Midlands Meander.

When respondents were questioned on any concerns that they might have regarding the association, the issue of high joining and membership fees was raised once again. Respondents also felt strongly about better assistance with signage on the route in terms of the branding of entrances to the region and signage for individual products. This is viewed as one of the crucial elements of successful visitor distribution in the region. Respondents concerned about cohesion in the association because there are rumours of “sub” interest groups forming which could do more harm than good. Some respondents mentioned that the division might stem from the perceived “unequal promotion” of certain establishments. A small number of respondents indicated that the MMA focuses primarily on the domestic market and that a slight shift in marketing towards overseas markets could be more beneficial to the region.

4.3 TOURISM CONSUMER SURVEYS

The analysis of consumers is divided into a description of the profile of consumers surveyed and their experience and expectations while on-route.

4.3.1 Profile of Consumers on the Midlands Meander Route

A total of 38 interviews of visitors to the Midlands Meander were conducted. It was found that 55 percent of respondents surveyed were male and 45 percent were female. The majority of respondents were White (84.2 percent) while 5.3 percent were Indian and 2.6 percent were Coloured. **Figure 4.9** shows that 39 percent were between the ages of 25 and 34 and 26 percent were between 25 and 49. Few of the respondents (16 percent) of the respondents spoke foreign languages like German, French, and Dutch.

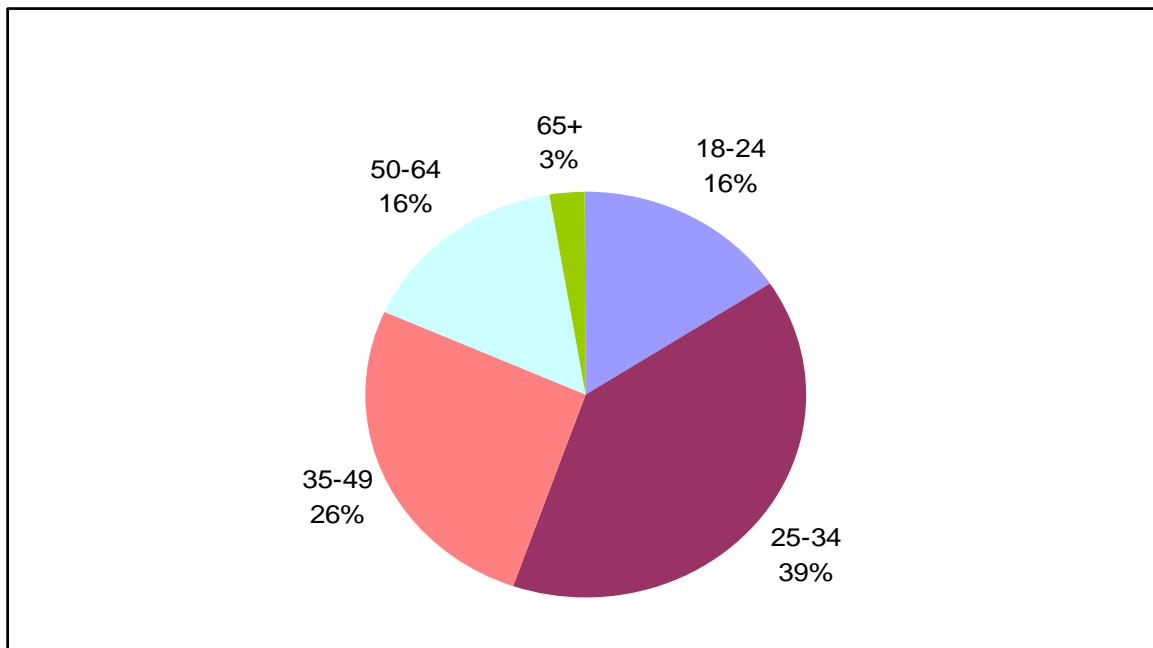


Figure 4.9: Age Profile of Visitors to the Midlands Meander Route

The largest proportion of visitors surveyed were South Africans (78 percent), while the second largest proportion (16 percent) originated from Western Europe (see **Figure 4.10**). Most travelers interviewed were part of small independent groups ranging between 4 and 6 people. Of all the overseas visitors interviewed, 77 percent were visiting South Africa for the first time. In terms of the duration of stay in the country, 58 percent of overseas visitors indicated that they are staying in South Africa for 2 to 3 weeks.

Most foreigners were interested in experiencing local cultures and scenery. Although the brand is well known locally, none of the international visitors to the area knew about the Meander before arriving in South Africa. Foreigners visiting the Meander are mostly self drive independent travelers who seem to stumble upon the Meander as they travel through South Africa.

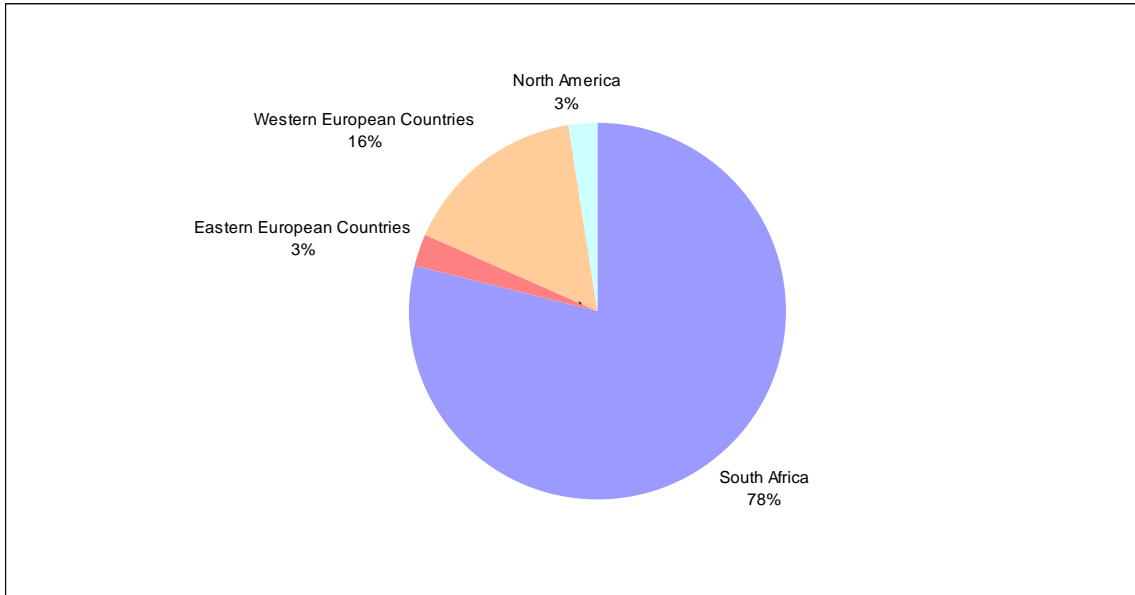


Figure 4.10: Origin of Visitors to the Midlands Meander Route

The research by Mathfield (2000) the showed that the enterprises surveyed in 2000 mostly targeted middle to high income clientele. The latest survey showed that the route attracts predominantly middle income travelers with 55 percent of tourists earning a household income of between R9 999 and R24 999 per month (see **Figure 4.11**).

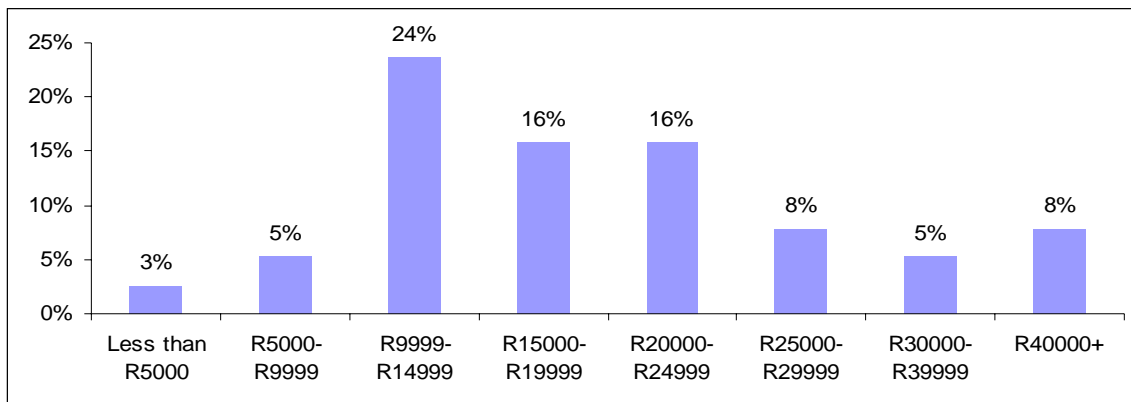


Figure 4.11: Monthly Household Income of Visitors to the Midlands Meander

The average visitor surveyed goes on holiday 1.9 times, takes 4.1 weekend getaways and goes on 9.8 special day outings on an annual basis.

The survey results indicate that there is also a segment of high income households attracted to the route; 21 percent of the sample earned a household income of R25 000 per month and more, while 8 percent have household earnings of R40 000 per month and more. The 8 percent of visitors in the R40 000+ per month bracket all originated from overseas.

According to respondents, the Midlands Meander is primarily a family holiday destination with 56 percent of tourists interviewed visiting the area for this purpose. However, 57 percent of those surveyed visited the Meander as a day attraction, while 28 percent stayed for the weekend and 15 percent stayed for longer than two nights.

The most popular marketing media used when researching holiday destinations is the Getaway magazine (34 percent), followed by the Internet search engines and guidebook sites such as Google and Lonely Planet (32 percent). In addition it was found that 18 percent are influenced by watching travel documentaries.

4.3.2 Experience and Expectations of Visitors to the Midlands Meander

It is important to know whether consumers recognise the Midlands Meander Route as a brand and if it is perceived as a good tourist destination. The response to the Midlands Meander brand was surprisingly positive with 89.4 percent of visitors recognising the route branding. It was established that 68.4 percent of respondents came to know of the Meander from local signage and from previous visits to the region, while 21 percent were referred to the Meander by a friend. The remaining 10 percent were referred by tour operators or learned about the Meander from their brochure.

According to the survey the primary motivation for consumers to visit the Midlands Meander Route is to “get away from the city”, be surrounded by “beautiful scenery” and “experience something different”. Further, 32 percent of respondents indicated that they are using the Midlands Meander as a stop-over en-route to other destinations. Respondents surveyed visited on average 4.9 attractions on the route, while 94.7 percent indicated that they have used the local destination brochure and map to make their travel decisions and locate attractions.

Domestic consumers surveyed spent on average R1 928 per visit, while overseas visitors spent R11 087 per visit. As shown in **Figure 4.12** domestic visitors spent proportionally more on accommodation and food, while overseas visitors spent proportionally more on activities and shopping.

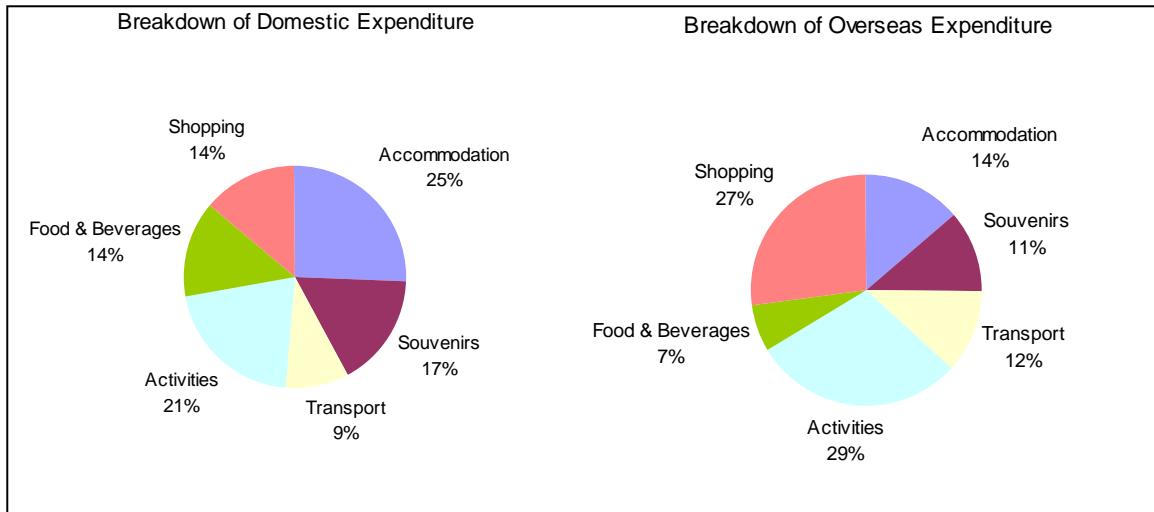


Figure 4.12: Expenditure of Domestic and Overseas Visitors on the Midlands Meander Route

The largest proportion of visitors (26 percent) made use of guesthouses and bed and breakfast type of accommodation, while a fair portion (21 percent) also stayed with family and friends. Backpacker accommodation also seems popular with those interviewed during the study (see **Figure 4.13**).

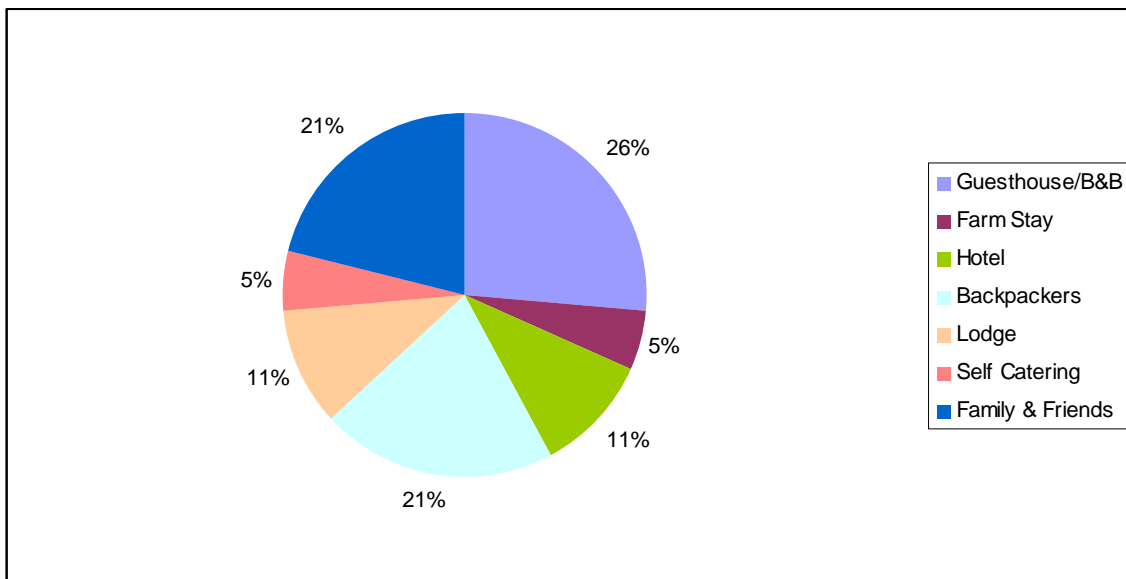


Figure 4.13: Accommodation Used on the Midlands Meander

A significant finding was that 63 percent of visitors interviewed are return visitors to the Meander. The proportion of day visitors to the Meander corresponds with the 63 percent of return visitors, which could indicate that locals visit the destination on a regular basis while

most visitors from Gauteng or overseas are first time visitors. Overall, 86 percent of visitors to the Meander felt that the experience was unique, while 66 percent indicated that the destination either met or exceeded their expectations and 92 percent said that they will recommend the route to others.

Figure 4.14 shows the results of visitors' perceptions of facilities and services. Respondents were asked to rate each service or facility according to their experience on the Meander where 1 is poor, 2 is satisfactory and 3 is excellent. The results indicated that most of the services were either satisfactory or excellent with information services, restaurants, attractions and friendliness of staff achieving the highest average ratings. Road signage, restrooms, efficiency of staff and public facilities achieved the poorest scores.

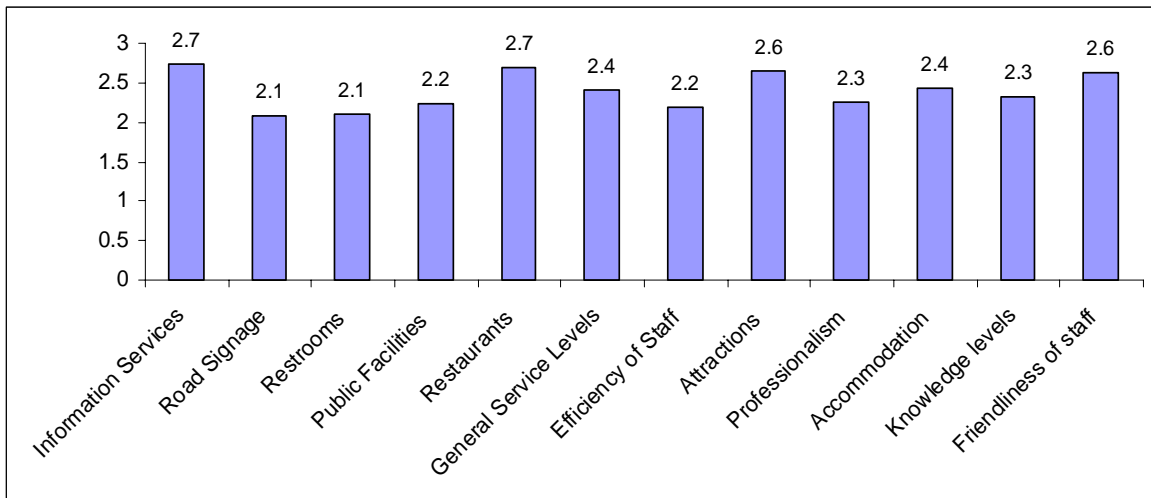


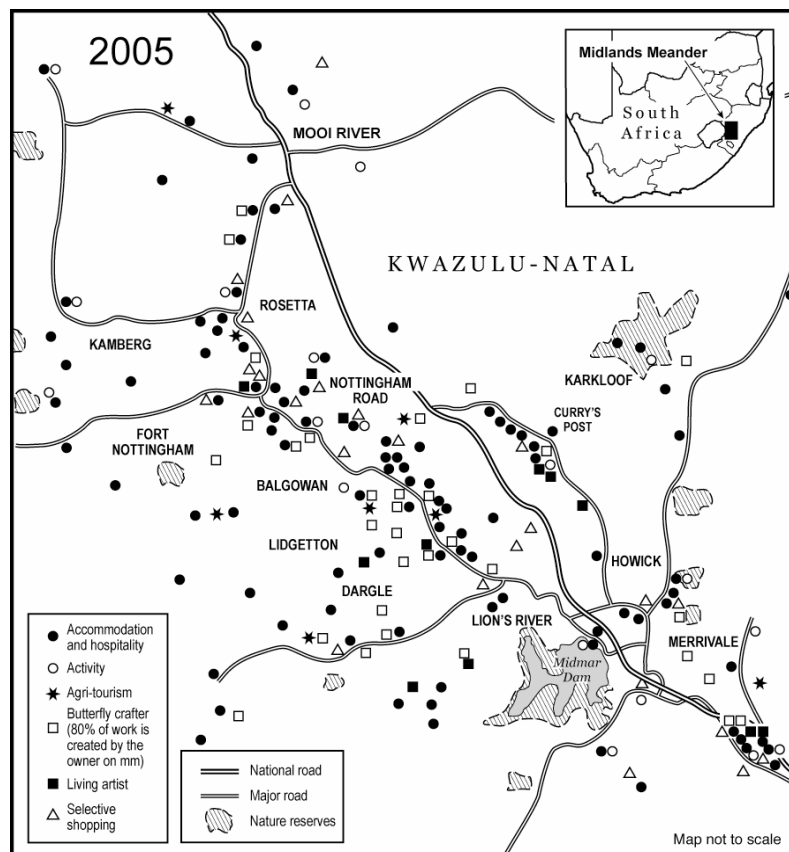
Figure 4.14: Rating of Facilities and Services

Respondents were asked to make recommendations on how the Midlands Meander Route could enhance visitor experiences. Although most people indicated that they liked the way things are at present and that it should not be changed, some respondents indicated that the route should provide a greater variety and improved quality of attractions in close proximity to the main road. Visits require safe open spaces to stop with facilities to cater for the needs of families. In addition, respondents mentioned that improved and increased support services such as roads, road signage, filling stations and automated teller machines (ATMs) would be a great advantage to the region. A few respondents indicated that they would increase their expenditure if there were more affordable curios and quality cultural experiences.

4.4 ASSESSMENT OF THE ASSOCIATION

4.4.1 Membership & Growth

The route concept was initiated in 1985 by five visionary artists and crafters (three potters, a weaver and an artist) with the intention to encourage members of the public to visit the countryside of the KwaZulu-Natal Midlands and simultaneously provide market access to small art and craft enterprises. The economies of scale offered by the joint marketing venture of local artists evolved by 1988 into a local tourism association with 57 members consisting of a variety of arts, crafts and hospitality products. During the initial years, the association faced many challenges, most importantly issues concerning finance and fragmentation. The Meander finally was consolidated in 1994 with a formal constitution. In that year the first colour brochure was designed and produced, advertising 68 products. A renewed public relations drive was initiated to attract new media attention and consumer interest. Since its humble beginnings in 1985, the Midlands Meander Association (MMA) has grown into a vibrant network of 229 members by 2006 (See **Figure 4.15**)



Source: Midlands Meander Association (2005)

Figure 4.15: Midlands Meander in 2005 with an Extensive Range of Tourism Product Along the R103 Route

It is estimated that at least 80 percent of the tourist establishments in the region are part of the association. The association charges a joining fee ranging from R3300 to R9500 depending on the type of establishment and an annual subscription fee of R1360. In return, members receive access to the Midlands Meander 'brand', public relations management, market exposure through brochures, representation at trade fairs (such as Indaba, Getaway adventure shows, or Decorex) and a website.

The association prints 250 000 brochures annually which are distributed locally and internationally. Other benefits are the annual media tour organised by MMA, occasional training workshops and the monthly newsletter containing information on marketing opportunities, events, new legislation, and latest industry trends. Recent research of tourism products in the region showed that over 40 percent of MMA members rely solely on the marketing efforts of the association.

4.4.2 Management Structures

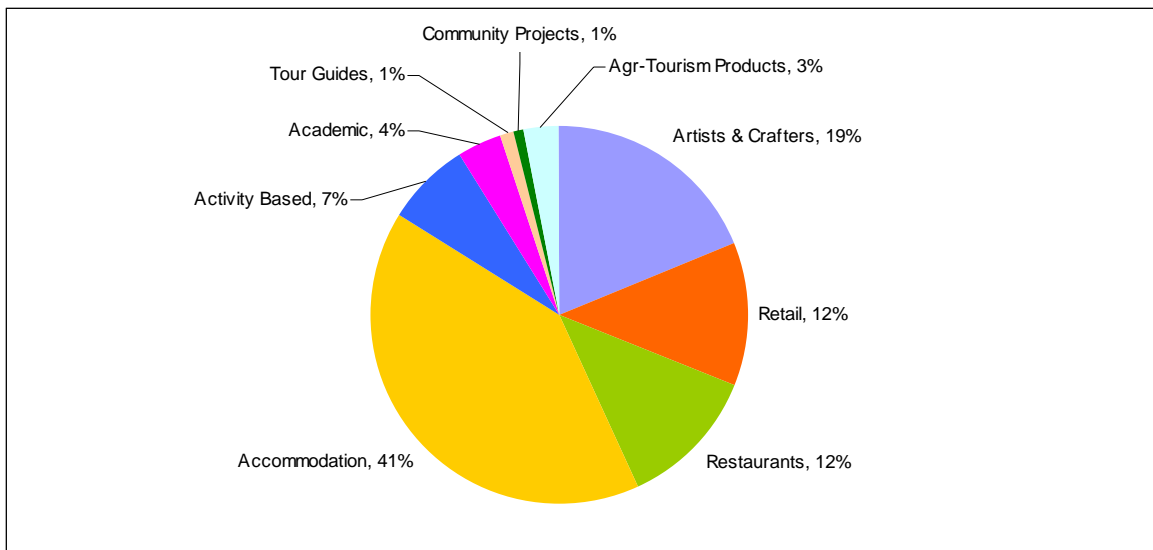
Tourism in the area is governed by a strategic planning process which is driven by the MMA Executive Committee. The management structure of the association consists of the Executive Committee (11-15 members), sub-committees (8 members), staff (3 people) and fieldworkers (3 people). According to the Chairman, the association appointed their first full time staff in 2004. The staff includes a general manager, a public relations manager and administrative person. Full time staff has contributed tremendously towards the effective management of the destination. It is important to note that the executive committee consists of voluntary members while the general manager and other full time staff earn a salary and are not allowed to have any vested interest in the area. It is only when the Meander finally appointed full time staff, that the association was able to produce tangible benefits to its members.

Mathfield (2000) criticised the Meander for not providing benefits to disadvantaged communities and assisting black entrepreneurs. Since 2000, the management of the Meander has actively pursued opportunities to assist emerging artists and tourism products in local communities. As a result, tourism products owned and operated by black entrepreneurs have developed and are also members of the association. In their 2005/6 brochure the Meander advertised five emerging tourism products. These enterprises are mostly cultural products such as cultural villages and craft enterprises. Further, a new category of membership was developed as part of the Meander's out-reach initiative and commitment to developing and promoting local artists in the community, called 'Living Art'. The publicity of artists is fully sponsored by the association and other advertisers. Currently, there are 17 'Living Art' members of which 6 are from previously disadvantaged

communities. Seven percent of the Meander’s budget in 2005 was dedicated to the social upliftment of local communities and providing support to emerging enterprises. This was increased to 12 percent in 2006.

4.4.3 Product Diversification

The Midlands Meander has grown to offer much more than arts and crafts. The region boasts a vast number of top-class hospitality establishments. As visitor numbers to the area has increased, the Meander has become an attractive investment proposition for accommodation providers. Converted from classic old farmhouses or outbuildings, the new accommodation facilities cater for the full spectrum of guests’ needs, ranging from luxury to rustic. As shown in 4.16, 42 percent of the product offering consists of accommodation establishments, followed by 19 percent arts and craft products. In total, the 96 accommodation establishments offer 1 200 beds and can accommodate around 350 000 overnight visitors per annum.



Source: Midlands Meander Association (2006)

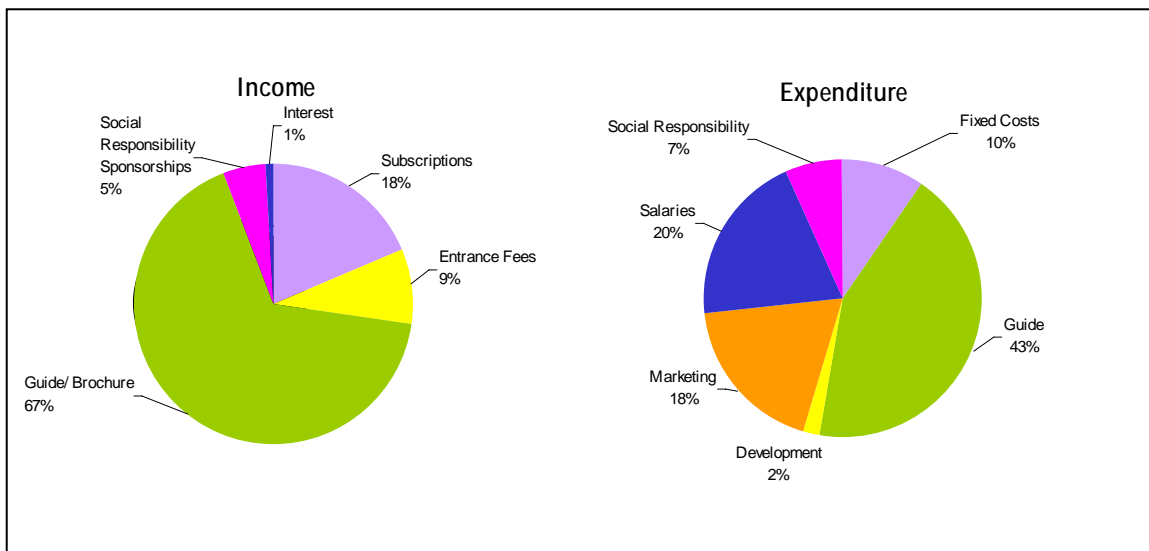
Figure 4.16: Breakdown of Tourism Products in the Midlands Meander

According to the MMA the number of rooms developed in the area has almost doubled since 1999. The tremendous growth in the provision of overnight accommodation was a concern to the association, especially since the current bed occupancy is only 32 percent per annum. Strategic planning and exchange of information with other international destinations led to the decision to implement mechanisms to discourage the development of certain products and encouragement of others. As revealed by the product survey in 2006, there is a delicate balance between draw-cards such as arts and craft enterprises and those products creating

job opportunities like for example accommodation establishments. Based on research, the MMA continually assists new entrepreneurs and investors in the destination to offer a larger number of activities and attractions which will lead to an increase in visitor numbers and bednight demand. The landscape of products is beginning to change with a variety of new facilities coming on stream such as health spas, golf, adventure activities, cultural experiences (offered by local previously disadvantaged communities), fine dining, and courses on creative involvement. The association is also in the process of developing a hiking trail in the area.

4.4.4 Finances

Many destination organisations in South Africa have failed or are restrained due to a lack of finances. MMA has recently established a non-profit section 21 company. The breakdown of income and expenditure of the MMA is shown in **Figure 4.17**. According to the association, 85 percent of their annual income is derived from membership fees and selling advertising space in their brochure. The MMA also plays an important role as conduit for the distribution of funds for social upliftment projects. The brochure, other marketing and salaries make up 80 percent of their total expenditure.



Source: Midlands Meander Association (2006)

Figure 4.17: Breakdown of Income and Expenditure of the Midlands Meander Association

4.4.5 Performance & Achievements of the Midlands Meander

A number of key events take place in the Midlands Meander each year such as the Midmar Mile, the Springvale Horse Trials and the Midlands Meander Marathon. The Meander also started hosting the Midlands Meander Creative Festival in 2004 and the “Slow food” festival earlier on this year. These events and other marketing activities attract over 300 000 visitors to the region per annum of which just over one-third stay over.

The Meander employs and estimated 2500 people and supports more than 36 000 people in total. The value of the Midlands Meander tourism industry is estimated to be around R200 million per annum.

The area is well recognised in the South African industry and respected for its unique branding identity. This provides the MMA with a strong ability to lobby on behalf of its members. It is understood that the MMA has built a good relationship with local, regional and provincial government and is perceived a key stakeholder in local planning activities in the region. In addition to the fact the tourism in the destination and the management thereof is sustainable, it reaches out to the local community through a variety of social upliftment and educational and conservation programmes.

4.4.6 Critical Success factors

One of the key functions that are central to the success of the Midlands Meander is quality assurance of products. In addition to the general requirements of the South African Grading Council, the MMA developed specific joining criteria for new products in the area to ensure that visitor expectations are met, in turn, building a good reputation for the destination. Inspections are also conducted on a regular basis to ensure that products adhere to the local code of conduct.

As the area has evolved from an emerging to a mature destination its management needs have also changed over time. In the formative years, the focus of the association was on providing an attractive environment and developing innovative products. The subsequent stages were new and more appropriate management structures for the destination. The MMA also continued on extensive marketing and public relations campaigns. At the same time, the association placed considerable emphasis on product quality assurance. As an established destination, the management is currently focusing on a range of different aspects including social and environmental responsibility, strategy, membership criteria and incentives for wanted attractions and product quality. As the organisation has developed, a value system evolved which governs the management and development of tourism in the area.

It can be argued that the successes of the Midlands Meander are based upon a combination of factors. A clearly identified unique selling point is very important to establish the route and create a clear brand within the industry and tourism markets. MMA's unique selling feature is 'Cottage industries in the Country'. Another important factor which was evident from the research is that a region requires a wide range of complimentary products that individually adds value to the generic product. The establishment of a competent destination management organisation is crucial. This organisation should have the ability to draw members with specific and related professional skills and to mentor others for sustainability. All decisions require transparency and carry the interest of the members and region in general. The destination management organisation is responsible for informing its members of the latest trends in the local and international tourism industry and should therefore keep abreast by attending industry meetings and linking to provincial and national forums. Ongoing research and constant re-evaluation is necessary to ensure that the region continues to grow new markets. Through employment, skills transfer and associated benefits the destination organisation is also responsible to create awareness of the value of tourism in its area and foster a tourism ambassadorship throughout the local community (Midlands Meander Association, 2006).

4.5 CONCLUSION

Overall, the Midlands Meander is a South African showcase of how the private sector conceptualised and developed a once marginal economic sector into a vibrant industry supporting nearly one-third of the local population.

The analysis of the development and workings of the Midlands Meander provide further light onto the key success factors that impact upon route tourism. The findings from this analysis strengthen the analysis of the international case studies as undertaken in Chapter Three. In Chapter Five, the concluding chapter, the core findings of the international and local experience are synthesized in order to provide a set of planning guidelines for route tourism development.

CHAPTER 5:

DISCUSSION AND CONCLUSIONS

The aim in this final chapter is to analyse the planning implications for route tourism development in general and in South Africa in particular. A summary of the key findings and arguments of this study are presented before turning to the offering of a synthesis in the form of planning guidelines for route tourism.

5.1 ROUTES TOURISM AS TOOL FOR SUSTAINABLE TOURISM

Ensuring long term sustainability has become the main challenge for those involved in the development and management of tourism. Continued growth in the tourism sector is associated with progress in consumer awareness of community benefits and a cleaner, safer and more environmentally friendly tourism sector (Middleton and Hawkins, 1998; UNWTO, 2001). The emergence of tourism routes has played a major role in advocating community-based tourism serving as a collective marketing tool for mostly small tourism enterprises within a particular destination (Pigram, 1992; Kinsley, 2000). In that regard, route tourism can be defined as an initiative that brings together a variety of activities and attractions under a unified theme and thereby galvanise entrepreneurial opportunity through the development of ancillary products and services (Grefe, 1994; Meyer, 2004).

Route tourism is essentially a market-driven approach for tourism destination development (Meyer, 2004). As argued at the beginning of this study the concept of 'route development' is described as the world's best hope to secure sustainability in travel and tourism (ECI Africa, 2006). The concept is particularly useful on a micro economic-scale because of the involvement of local communities. Besides the economic benefits, tourism can also be conducive to environmental and cultural conservation efforts. Tourism routes can therefore be seen as a vehicle for a variety of government and private sector developmental objectives (Hall *et al*, 2003; Meyer-Cech, 2003; Briedenhann and Wiekens, 2004; ECI Africa, 2006). This phenomenon was demonstrated clearly in the international case studies on route tourism which was the focus from the analysis in Chapter Three.

5.2 THE CHANGING NATURE OF TOURISM DEMAND

It was argued that during the past 20 years route tourism has become a viable tourism product development option due to the changing needs in global tourism demand. During this time tourism has not only seen significant growth but has also shown a continued diversification (UNWTO, 2001). The changing global market is providing new national destinations and emerging destinations in each country with increasingly more opportunities. The staggering nature of holidays, the complex requirements of tourists and the improvement of the conditions that foster tourism development are clearly contributing to this process (UNWTO, 2001).

Hummelbrunner and Miglbauer (1994) state that evolving tourism trends have led to a shift away from standardised mass tourism to more individualistic patterns in which greater flexibility and a more meaningful experience have gained prominence. In particular, they argue that the recent growth in demand for rural tourism has a wide range of motivations, from ecological uniqueness, special adventure opportunities, cultural attractions or the peace and quiet of the countryside (Hummelbrunner and Miglbauer, 1994). Importantly, the work of Greffe (1994) suggests that this provides a unique opportunity for rural operators in terms of “economies of scale” by establishing networks of different service providers organised in such a way as to maximise opportunity, and to offer a wide range of products and activities. For suppliers of rural tourism this emphasises the significance of the development of a product that attracts, satisfies and retains the market (Greffe, 1994; Hummelbrunner and Miglbauer, 1994).

It has been suggested that the promotion of routes offer a particularly good opportunity for less mature areas with high cultural resources that appeal to special interest tourists, who often not only stay longer but also spend more to pursue their particular interest (Meyer, 2004).

5.3 ROUTES AND POVERTY ALLEVIATION

As Ashley and Mitchell (2005) shows, tourism is becoming an increasingly important economic sector in Africa within more than half of Sub-Saharan African countries. The possibilities of tourism are of growing interest to governments and donor organisations in respect of poverty alleviation (Ashley and Mitchell, 2005). In that regard, South Africa's Trade and Industry Chamber commissioned the development of a strategic plan for SMME development through routes and community-based tourism (ECI Africa, 2006). Pro-poor Tourism in Practice (2004a) explores opportunities for the involvement of poor communities in Africa through the development of route tourism. They argue that a new route can lead to

the development local enterprises, increasing the demand for goods and services of the poor, and contribute to much needed employment. The potential to utilise tourism as a tool for sustained socio-economic development as well as the redistribution of developed-country wealth is obvious, yet a somehow elusive goal, (see Pro-Poor Tourism in Practice, 2004a, 2004b)

The recognition of the importance of tourism as a potential driving force in the socio-economic development of third world countries suggests that tourism development can be an avenue toward a growing sphere of trading opportunities and accordingly, one of the most effective methods to avoid the risk of increased marginalisation from the global economy.

5.4 REFLECTING ON ROUTES IN THE DEVELOPED AND DEVELOPING WORLD

Evidence provided in this study suggests that several developed country attempts at the development of routes have been successful, as indexed by increased visitor numbers and spreading of local economic benefits. This condition is especially true of tourism routes in Europe. One of the most famous European routes investigated in the study, the Camino de Santiago, is generating an estimated €4,7 billion per annum for the Galicia region of northern Spain (TurGalicia, 2005). This route is one of the most widely studied and publicised routes amongst academics because of its achievements. After the Camino de Santiago was established, the Council of Europe founded 17 routes, all of which are considered successful in respect of their initial objectives which are to preserve cultural heritage and provide economic benefits to local communities (Council of Europe, 2002).

The picture in Africa is, however mixed, with only a few successful private sector driven initiatives such as the Midlands Meander and the Western Cape Wine Routes (Nowers, de Villiers and Myburgh, 2002). The most high profile route tourism initiative in Africa, Open Africa was designed as a development programme to assist communities, throughout Africa, to develop tourism routes (de Villiers, 2002; Visser, 2004; HSRC, 2006). Open Africa is a strong advocate for route tourism development in the region albeit it has been severely criticised by the local tourism industry (ECI Africa, 2006). With only 8 functioning routes out of 38 projects, the approach by Open Africa cannot be described as successful. According to the report by HSRC (2006) Open Africa has not only failed to create sustainable benefits for poor communities but has caused distrust and substantial barriers to achieving meaningful participation in local communities. The managers of Open Africa admit that support required by communities with the desire to develop a route within their area is immense and remains one of the major challenges that would have to be overcome to achieve successful routes tourism in South Africa (Briedenhann and Wickens, 2004).

In retrospect, the lessons learned from the international case studies have clearly underlined the errors of Open Africa. Of importance is the fact that Open Africa developed too many routes over a short period of time. It is observed that the short period of intervention in the establishment of routes by Open Africa is thus not meaningful enough to ensure lasting effects. The programme produced weak management and support structures which caused many routes to collapse. By contrast, the route tourism development programme by the Council of Europe developed 17 routes over a period of 20 years. In comparison, Open Africa developed 60 routes over a period of 7 years. This led to an oversupply of tourism themed routes which undermined the effectiveness of the concept (Olsen, 2003). Another drawback of Open Africa, is however, its methodology of implementation. At most, it covers three of the five critical aspects mentioned by Meyer (2004) which is required for the successful development of routes namely the establishment of cooperative networks, the promotion of destinations and a focus on poverty alleviation.

5.5 SUCCESS FACTORS FOR DEVELOPING TOURISM ROUTES

The significant policy findings by Meyer (2004) emphasise the establishment of cooperation networks, regional thinking and leadership, product development, infrastructure and community participation, promotion and an explicit pro-poor focus as core elements for successful route tourism development.

International case studies of successful routes include the Camino de Santiago in Spain, the Queensland Heritage Trails in Australia and Hadrian's Wall in the United Kingdom. All three destinations are considered mature tourism destinations which have achieved a set of predetermined objectives. In the case of the Queensland Heritage Trails for example, its success is defined by the ability of themed routes to link heritage sites, rural communities and nature-based attractions to the main-stream tourism segment in Queensland which is beach tourism (QHTN, 2006). Even in the case of World Heritage Sites such as Hadrian's Wall, where the preservation of the site is paramount, it is considered inappropriate to introduce visitor management methods which could reduce jobs or businesses opportunities. In most cases the ability of the route concept to deliver economic benefits to communities is equally important to the environmental and cultural preservation of assets. It is important for local communities of route destinations to become advocates for tourism development as a result of the real benefits experienced.

As stated by Meyer (2004) the adequate marketing and promotion of any route tourism initiative is vital to its success. Marketing and promotional aspects of destinations are

specialised functions which are related to an understanding of tourism markets, marketing and promotion channels, and development of collateral and packing of products.

The international and local experience contains good examples of how the development of certain products can be effective as draw-cards for increasing visitor demand. By contrast it was argued that poor signage and information services can be the downfall of any good marketing or product development strategy.

If the marketing efforts of the three international studies are compared, it is evident that, in the early stages, both the Camino and Hadrian's Wall relied heavily on their World Heritage Site status. In both cases it was shown to be detrimental to their growth in visitor demand. In fact, for Hadrian's Wall the poor quality and lack dynamic interpretation centres caused a decrease in visitor numbers which was later countered by the introduction of hiking trails and cycling paths. The visitor numbers to the Camino were developing slowly until the holy year festivals were introduced. However, in the case of the Queensland Heritage Trails, the marketing of the routes rely heavily on signage, and advertising by regional and local tourism organisations. These include a range of activities such as guidebooks, visitor centres and area brochures with suggested route planners.

The international analysis disclosed that marketing is one of the biggest expenses of a route destination organisation. The concept of collective marketing has proven to be economical in respect of potential returns, especially for smaller establishments such as bed and breakfast establishments and arts and craft enterprises.

The international research further strengthens the case for a well-balanced management structure, including both public and private sector, as a fundamental for a route to become successful. Further, the research showed that significant funding must be secured for the conceptualisation and development of key tourism infrastructure as well as the ongoing management and marketing. It was found that all three successful international routes were largely dependent on a significant local and/or regional tourism demand.

The local case study research on route tourism development focused on the Midlands Meander. This is regarded by the tourism industry as a South African showcase of a private sector initiative which turned a once marginal economic sector into a vibrant tourism industry.

Primary research of products and consumers of the Midlands Meander revealed that road signage is one of the key ingredients which assist routes to be recognised as a destination as well as effectively distributing visitors to a variety of products and attractions. Even though the association achieved good signage coverage from the main routes, consumers felt that it was lacking in some of the more remote areas of the route. The quality and variety

of attractions is two of the important aspects which were identified by consumers in conjunction with good roads and support services such as banks. The Midlands Meander Association continually adjusts its strategic planning to accommodate the market requirements in terms of quality assurance and putting incentives in place for new unique attractions and adventure operators to join the association. Nonetheless it is evident that support from the public sector is required to improve the delivery of public services in order to enhance the visitor experience in the destination.

As shown by the Midlands Meander Association the management and marketing of the routes may be done wholly by the private sector, or, as demonstrated in the international case studies, it can be supported by government in one sense or another, or in a public private partnership. However, the development of capacity in private sector associations is essential for success. Accordingly the establishment of a route is process-driven and takes time to build confidence and trust.

As a rule, the majority of destination management organisations in the developed world receive at least half of their funding from the public sector (UNWTO, 2004). Even though local governments in South Africa are responsible for tourism development, the inability of local governments to take responsibility for tourism planning is widespread (Rogerson, 2007). Even though it is proven that associations and destination marketing organisations worldwide are dependent on funding from provincial and local authorities to execute their functions properly, the issue remains unresolved in the South African context. The lack of sustainable route management organisations in South Africa and in the rest of Africa can mostly be ascribed to the lack of financial resources. In poor areas or peripheral regions, the prospect of a successful route destination seems unreachable due to the inability of individual enterprises to contribute towards membership fees; the basic building block of a meaningful initiative.

In addition to funding, tourism development in the South African environment has many other challenges to overcome. Emerging destinations in South Africa have a shortage of tourism management and marketing skills (ECI Africa, 2006). The marketing of a route or destination to a large variety of market niches requires skilled management that understands the various tourism channels and has the ability develop strategic partnerships with distributors/transport providers that could assist in better access to markets (ECI Africa, 2006). In many instances small enterprises refuse to work through commercial operators and the management is then forced to establish its own information and sales system which might not be as effective in realising benefits in the short term. This issue is further highlighted by Donaldson (2007: 303), who points out that “high unemployment, isolated location, lack of infrastructure, lack of and/or the ability to exploit cultural and natural resources are but a few factors

hindering tourism development initiatives in small towns located outside the weekend-trip zone from the urban nucleus”.

Another major challenge that has to be overcome is the provision of services and infrastructure to meet the requirements of a variety of different markets once they arrive in the destination (ECI Africa, 2006). A crucial factor playing a role in service delivery is the issue of signage (Meyer, 2004). Routes considered of “international standard” must provide proper signage, interpretation, information and guiding in the languages of their main source markets. This research has shown that the provision of tour guiding and interpretation in the languages of major source markets enhances the visitor experience which in turn leads to positive marketing in foreign markets through word of mouth. Considering that this is a key aspect highlighted by products as well as consumers of the Midlands Meander it is an issue that destinations in South Africa will have to address.

In all three international case studies, the partnership between public and private sector role players was evident and confirmed the importance of public funding required to provide the enabling environment for tourism to grow. In the case of South Africa, destinations must first overcome fragmentation and mobilise a range of diverse stakeholders to collaborate for the sake of developing the local economies. The role of local government and private sector stakeholders during the implementation and management of routes cannot be overemphasised. This role goes hand-in-hand with the availability and access to capital for the effective preservation of heritage assets and development of tourism products to serve consumer markets.

As demonstrated in this study, routes have the potential to unify attractions and products under one marketing umbrella and increase their potential for success by providing tourists with a diverse and yet integrated experience. The research shows clearly that routes tourism can play a catalytic role in the economic development of communities through government funding and local leadership. Significant public sector investment is required, however, to unleash major private sector investment opportunities in all three cases. The fine balance between all aspects of route tourism development is important and must be localised to ensure positive results. Holistic planning is required for the delivery of a holistic visitor experience. The initial policy guidelines by Meyer (2004), strengthened by the international and local case studies are synthesised below and extended in order to provide a set of planning guidelines for route tourism development, provided in the following section.

5.6 STEPS TO SUCCESSFUL ROUTE TOURISM DEVELOPMENT

The international and local case studies discussed provide the underpinnings for a holistic approach towards route tourism development. The aim in concluding section is to consider major success factors and offers advice to destination managers on key steps to include as well as pitfalls that should be avoided in route tourism development. The task is to consolidate the thinking on route tourism development and to go beyond the policy findings of Meyer (2004) on this subject in developing comprehensive guidelines for route tourism development in South Africa. The key steps in the establishment and positioning of routes are discussed in detail below.

At the outset it must be recognised that most destinations involved in route tourism in South Africa are emerging destinations. It is evident that these destinations need guidelines to assist them through their development phases. The developmental phases of routes have been identified as establishment and positioning, growth and maturity, as graphically portrayed in **Figure 5.1**. The various phases of development as shown in **Figure 5.1** are recognised by specific characteristics. Each phase and its characteristics are described below.

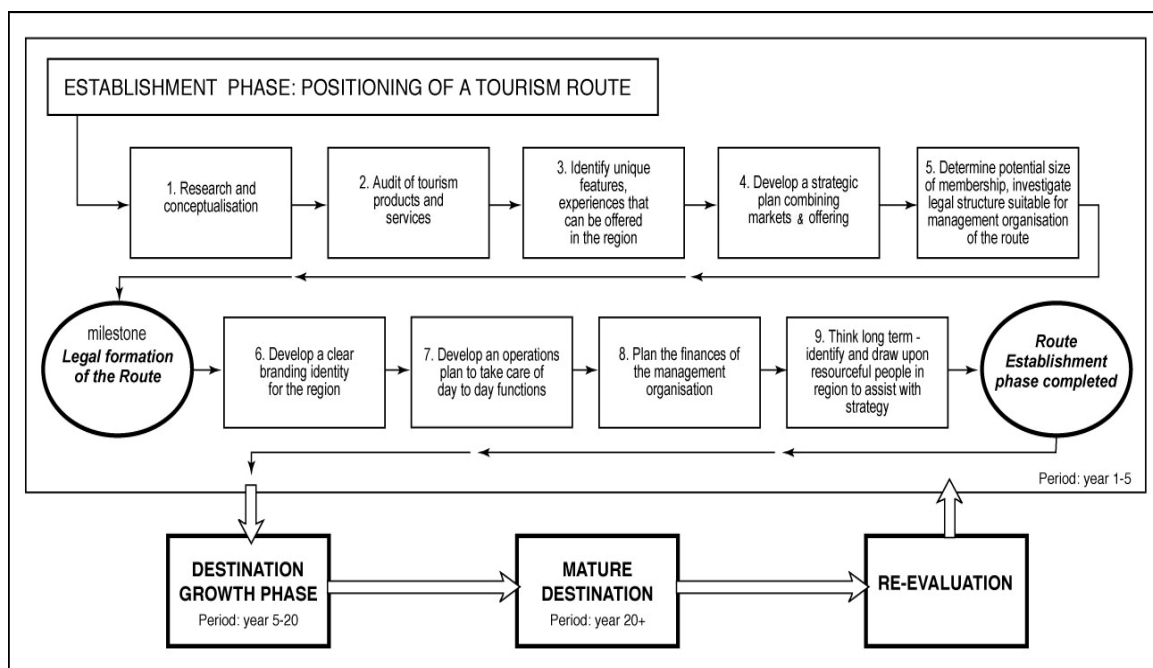


Figure 5.1: Process of Establishing and Positioning of a Route Tourism Destination

When a new route destination is developed, it is usually unrecognised in the market place with only a small number of visitors to the area and limited tourism infrastructure. During this phase committed leadership is required to see the potential and develop a vision for the region. The establishment and conceptualisation phase of a route as shown in **Figure 5.1** contains nine steps which could take between one and five years to complete. Precision and inclusiveness are required during the establishment and conceptualisation phase to ensure the desired long-term effects.

Firstly, the route must be conceptualised based on solid market research which identifies key target markets and their requirements. Market research must be conducted on a continuous basis to ensure that the latest tourism trends are included into objectives and strategies for the area. When budgets are tight, it is necessary to align the destination to a local, regional or provincial tourism authority or link to a local university to provide students or volunteers to assist with market research.

Secondly, an audit of tourism products within the designated area must be conducted. This audit may include the natural environment, “man” made products and human assets. Assessments of existing product must be conducted to ensure that products are keeping up to date with the changing dynamics of the tourism industry. The association must clearly determine a minimum standard (equal or higher than the national grading system) for members and a system for regular re-assessment. Failing to set minimum standards, might jeopardise tourist experiences in the area and cause negative marketing which, in the long run, may result in unsuccessful destinations.

The third step is to scrutinise the tourism assets and identify the unique selling features or experiences of the area and its products. Unique features are extremely important to distinguish and position the destination in the market place. Once the unique selling features have been identified, a macro level strategic plan must be conducted that combines the market requirements and the tourism assets of the region, providing a consolidated approach towards the future development of the area. It is important that the area consults its local, regional and provincial authorities regarding its strategy and future plans for the area. This will ensure that the envisaged route coincides with the macro planning for the region and potentially could link with broader planning or funding initiatives.

The next step will be to determine the potential size of the possible membership base. Tourism products with the ability to complement the unique features and main themes of the route must be lobbied to join the organisation from the early stages. If a legal structure is not yet in place, legal advice must be sought on the best structure suitable for any potential management organisation. Once the organisation is formed, specific portfolios for committee members must be developed according to the identified strategic objectives and to ensure

nominated members have the willingness and experience to perform within these portfolios. It is advisable to incorporate mentorship within the committee and sub-committees or task teams for sustainability of skills. Care must be taken not to incorporate products that are not complementary to tourism or the envisioned branding and values of the area for revenue gain. The association should avoid putting dominant members who act for personal or political gain into management positions. It is also important to be inclusive of all stakeholders within the region to ensure that the benefits are shared by all members of the community.

Further, destination managers should encourage product diversification in the area by putting systems in place to incentivise the correct product mix for the area. For example, it is not healthy for an area to have only accommodation establishments. Accordingly, an association in an area with many accommodation establishments should have high joining fees for products falling within this category. Research conducted as part of this study shows the importance of unique attractions in a destination and how these products could be used as draw-cards to induce the use of support services. As shown in the analysis of the Midlands Meander case, special events can also be used to produce the same effect.

After the membership plan is finalised, the association must determine and plan a clear brand identity for the region. The importance of marketing the destination according to its identity, determined by its unique features must be stressed. Marketing in the form of public relations is more affordable and sometimes more effective than hard core marketing, especially in the case of emerging destinations. The misrepresentation of the destination in marketing material can be fatal to the reputation of a destination, it is crucial not to overstate and under-deliver.

When marketing a destination it is important to know which market is targeted and what its key requirements are. As shown in the case studies, it is likely that the largest proportion of the market for a route will be locals from within a region. It is thus essential that proper signage of a route, according to the chosen branding, should be one of the first marketing actions to perform. The signage and branding of the region is important for the development of public awareness and acknowledgement.

The next step must be to determine a clear strategy to direct the work plan and day to day operations of the organisation. This requires an operations plan that ensures good communication between the association and its members as well as the roles and responsibilities of committee members and staff. In this way the association avoids the danger of fragmentation between committee members and other members.

The planning of finances is crucial for the overall survival of an association. Initially it is important to allocate resources according to strategic importance. The association and its members must constantly remind themselves to think on a long-term basis especially as most projects start small and can take 20 to 30 years to mature and deliver substantial economic benefits. The association must therefore be realistic about its setting goals for itself in the short term. Nonetheless, it is advisable to work towards the appointment of full-time staff for the achievement of faster results.

Once the establishment and conceptualisation phase has been complete, the destinations enter a growth phase. This phase is characterised by increasing visitation levels that attract local investment in tourism and public investment in infrastructure. The destination and market share come into being with the efforts of advertising and marketing. As demonstrated in the local and international case studies, the management focus should be to implement a good product development strategy which could lead to growth in visitor demand. The growth phase is usually extended over a long period of time. It starts in year five of a destination and could last until year twenty from the inception of the route.

From year twenty onwards, destinations usually reach maturity. This phase is characterised by the fact that the main income of the local economy comes from tourism and the visitation levels continue to increase albeit at a decreasing rate. As was demonstrated by the analysis of the Midlands Meander this phase exemplifies extensive efforts in advertising and marketing to overcome the seasonality and to develop new markets. During maturity, the importance of tourism is appreciated fully by the local population. At this stage, a wide range of markets are attracted and the growth rate is slowing down. Management efforts during maturity should be focused on the maintenance of markets and quality of visitor experiences; especially during peak season when capacity limits are reached. When maturity is reached it may happen that markets start perceiving the route destination as “unfashionable”. At this point, it might be necessary for destination managers to re-evaluate the position of the area and revisit the steps in the establishment phase to prevent the route from falling into stagnation.

Although the focus of the planning guidelines is biased towards private sector driven development, these guidelines can also be used by public sector planners. The private sector driven approach has proven to be more practical and successful in the southern African environment. Ultimately the institutional structure for a successful destination demands an effective partnership between the public and private sector organisations responsible for tourism within a particular destination. Certain functions, such as macro planning, are better suited to be fulfilled by the public sector. Design and implementation of funded programmes to complement macro planning initiatives is a function that should reside

within the public sector and is extremely important for the success of destination development initiatives.

Overall, this study has undertaken an analysis of both “good practice” international and local examples towards the objective of extracting policy guidelines for route tourism. It is argued that the policy guidelines set forth in this conclusion go beyond the work of Meyer (2004) and provide a foundation for the planning of route tourism in South Africa.

REFERENCES

Ashley, C. and Mitchell, J., 2005: Can tourism Accelerate Pro-Poor Growth in Africa?, London: Overseas Development Institute.

Briedenhann, J. and Wickens, E., 2004: Tourism routes as a tool for the economic development of rural areas – vibrant hope or impossible dream?, *Tourism Management*, 25, 71-79.

Britton, S., 1991: Tourism, capital and place: Towards a critical geography of tourism. *Environment and Planning D*, 9, 451–478.

Bruwer, J., 2003: South African wine routes: some perspectives on the wine tourism industry's structural dimensions and wine tourism product, *Tourism Management*, 24, 423-435.

Bureau of Tourism Research, 2001: *Travel by Australians — Results of the National Visitor Survey*. Canberra: Bureau of Tourism Research.

Cook, P. and Kirkpatrick, C., 1997: Globalization, regionalization and third world development. *Regional Studies*, 31, 55-66.

Council of Europe, 1994: Cultural Routes of the Council of Europe: Revitalisation of the Santiago de Compostela Pilgrim Ways, ICCE Resolution (94) 9, Council of Europe, Strasbourg.

Council of Europe, 2002: The Europe of Cultural Cooperation: The 2nd Tourism Industry and Education Symposium May 16–18, 2002, 37–45. [Available at www.culture.coe/fr/routes/eng/eitin2.0 Retrieved 25.02.02. Accessed on 16 December 2006.]

Countryside Agency, 2003: Rural economies: Stepping stones to healthier futures, Countryside Agency Publications, West Yorkshire. [Available at www.countryside.gov.uk. Accessed on 14 December 2006.]

Dernoi, L., 1991: Prospects of rural tourism: Needs and opportunities. *Tourism Recreation Research*, 16(1), 89–94.

De Villiers, N., 2000: Open Africa: Unleashing the Spirit of Africa – An Operational Handbook. [Available at www.africadream.org. Accessed on 7 January 2007.]

Donaldson, R., 2007: Tourism in small town South Africa, in C.M. Rogerson and G. Visser (eds), *Urban Tourism in the Developing World: The South African Experience*, New Brunswick, NJ and London: Transaction Press, 307-325.

Eby, D.W. and Molnar, L.J., 2002: Importance of scenic byways in route choice: a survey of driving tourists in the United States, *Transportation Research Part A: Policy and Practice*, 36, 95-106.

ECl Africa, 2006: Community-based tourism, Unpublished report for FRIDGE, Johannesburg.

Economics Research Associates (ERA), 2004: Hadrian's Wall Major Study Report, Unpublished report for the Northumberland Council, UK.

English Heritage, 2001: Hadrian's Wall World Heritage Site Management Plan 2002-2007. [Available at <http://www.hadrians-wall.org> accessed on 5 December 2006.]

English Heritage, 2003: Hadrian's Wall World Heritage Site: A Case Study. The Getty Conservation Institute, Los Angeles. [Available at <http://www.getty.edu/conservation>. Accessed on 12 December 2006.]

Estévez, X., 2001: Santiago de Compostela, Spain, in R. Pickard (Ed), *Management of Historic Centres*, London: Spon Press, 223–41.

Evans, N. J. and Ibery, B. W., 1989: A conceptual framework for investigating farm-based accommodation and tourism in Britain. *Journal of Rural Studies*, 5(3), 257–266.

Fagence, M., 1991: Rural tourism and the small country town, *Tourism Recreation Research*, 16(1), 34–43.

Frey, N., 1998: *Pilgrim Stories. On and off the Road to Santiago*, Berkeley: University of California Press.

Getz, D., 1983: Capacity to absorb tourism: Concepts and implications for strategic planning, *Annals of Tourism Research*, 10(2), 239–263.

Gilbert, D., 1989: Rural tourism and marketing: Synthesis and new ways of working, *Tourism Management*, 10(1), 39–50.

Gilitz, D.M. and Kay, L., 2000: *The Pilgrimage Road to Santiago*, New York: St Martin's Press.

González, L.R.C. and González, R.R., 1998: The Strategic Promotion of the City of Santiago de Compostela, in L. L. Trigo (Ed), *El planeamiento urbano y estratégico: II Jornadas de Estudio y Debate urbanos*, Universidad de León, 145–59.

González, L.R.C. and Medina, J.S., 2003: Cultural tourism and urban management in north-western Spain: the pilgrimage to Santiago de Compostela, *Tourism Geographies*, 5 (4), 446–460

Goodey, B., 1997: *Heritage Trails, Rural Regeneration through Tourism*, Ecovast: University of Gloucestershire.

Grefe, X., 1994: Is rural tourism a lever for economic and social development?, *Journal of Sustainable Tourism*, 2, 23–40.

Gunn, C.A., 1979: *Tourism Planning: Basics, Concepts, and Cases*, New York: Crane, Russak.

Hadrian's Wall Tourism Partnership, 2003: Market Towns Initiative in Tynedale. [Available at www.hadrians-wall.org accessed on 5 December 2006.]

Hall, C., Mitchell, R. and Sharples, L., 2003: Consuming places: the role of food, wine and tourism in regional development, in C.M. Hall, L. Sharples, R. Mitchell, N. Macionis, and B. Camborne (Eds.), *Food Tourism Around the World: Development, Management, and Markets*. London: Butterworth-Heinemann, 25-59.

Harrison, D., 1994: Tourism, capitalism and development in less developed countries, in L. Sklair (Ed.), *Capitalism and Development*, New York: Routledge, 232–257.

Haywood, K. M., 1988: Responsible and responsive tourism planning in the community, *Tourism Management*, 9(2), 105–107.

Hill, B. J. and Gibbons, D., 1994: Sustainable tourism- heritage trails in Nebraska, *Poverty: Building a sustainable world through tourism*. Montreal: Second Global Conference.

Human Science Research Council, 2006: Successes and Challenges in Pro-Poor Tourism: New Models, Better Results, Unpublished report for the Department of Environmental Affairs and Tourism, Pretoria.

Hummelbrunner, R. and Miglbauer, E., 1994: Tourism promotion and potential in peripheral areas: The Austrian case, *Journal of Sustainable Tourism*, 2, 41–50.

Ioannides, D., 1995: Planning for international tourism in less developed countries: Toward sustainability?, *Journal of Planning Literature*, 9(3), 235-254.

Jackson, J. and Murphy, P., 2006: Clusters in regional tourism: An Australian case, *Annals of Tourism Research*, 33 (4), 1018 – 1035.

Kinsley, M., 2000: *Economic renewal guide: A collaborative process for sustainable community development*, Snowmass, Colorado: Rocky Mountain Institute.

Lew, A., 1991: Scenic roads and rural development in the US, *Tourism Recreation Research*, 16 (2), 23–30.

Long, P. T., Perdue, R. R. and Allen, L., 1990: Rural resident perceptions and attitudes by community level of tourism, *Journal of Travel Research*, 19, 3–9.

Marsden, T., 1992: Exploring rural sociology for the Fordist transition: Incorporating social relations into economic restructuring, *Sociologia Ruralis*, 32, 209–230.

Mathfield, D., 2000: Impacts of accommodation and craft-based tourism on local economic development: the case of the Midlands Meander, Unpublished Masters Research Report, University of Natal, Durban.

Meyer-Cech, K., 2003: Food trails in Austria, in C.M. Hall, L. Sharples, R. Mitchell, N. Macionis and B. Camborne (eds), *Food Tourism Around the World: Development, Management, and Markets*, London: Butterworth-Heinemann, 149-157.

Meyer-Cech, K., 2005: Regional cooperation in rural theme trails, in D. Hall, I. Kirkpatrick and M. Mitchell (eds), *Rural Tourism and Sustainable Business*, Clevedon: Channel View, 137-148.

Meyer, D., 2004: *Tourism Routes and Gateways: Key Issues for the Development of Tourism Routes and Gateways and Their Potential for Pro-Poor Tourism*, London: Overseas Development Institute.

Midlands Meander Association, 2005: Map: *Association Marketing Brochure 2005/6*, Pietermaritzburg: Midlands Meander Association.

Midlands Meander Association, 2006: A Case Study of a Successful Private Sector Local Tourism Initiative, Unpublished paper presented at the stakeholder workshop on community-based tourism, Johannesburg, 29 November.

Middleton, V. T. C. and Hawkins, R., 1998: *Sustainable Tourism: A Marketing Perspective*. Oxford: Butterworth-Heinemann.

Millward Brown, 2000: Visitor Satisfaction Study: Tourist, Services and Direction Signing, Unpublished report conducted for Tourism Victoria, Melbourne.

Miossec, J. M., 1977: Un modele de l'espace touristique, in M. Oppermann, and K.S. Chon (Eds.), *Tourism in Developing Countries*, London: International Thomson Business Press.

Murphy, P. E., 1983: Tourism as a community industry: An ecological model of tourism development, *Tourism Management*, 4(3), 180-193.

Murphy, P. E., 1985: *Tourism: A Community Approach*. New York and London: Methuen.

Murray, M. and Graham, B., 1997: Exploring the dialectics of route-based tourism: the Camino de Santiago, *Tourism Management*, 18, 513-524.

Nowers, R., De Villiers, E. and Myburgh, A., 2002: Agricultural Theme Routes as a Diversification Strategy : Western Cape Wine Routes Case Study, *Agrekon*, 42 (2), 195-209.

Olsen, M., 2003: Tourism themed routes: a Queensland perspective, *Journal of Vacation Marketing*, 9, 331-341.

Open Africa, 2002: Information Relating to the African Dream Project. Cape Town. [Available from www.openafrica.org. Accessed on 5 May 2007.]

Page, S. J. and Getz, D., 1997: *The Business of Rural Tourism: International Perspectives*, London: International Thomson Business Press.

Patton, M. Q., 1990: *Qualitative Evaluation and Research Methods* (2nd ed.). Newbury Park, California: Sage.

Pigram, J., 1992: Alternative tourism: Tourism and sustainable resource management, in V. Smith, & W. Eadington (Eds.), *Tourism Alternatives: Potentials and Problems in the Development of Tourism*. Philadelphia: University of Pennsylvania Press, 76–87.

Poon, A., 1989: *Tourism, Technology and Competitive Strategies*. Wallingford, CAB International.

Potts, T.D. & Harrill, R., 1998: Enhancing communities for sustainability: A travel ecology approach, *Tourism Analysis*, 3, 133-142.

Prentice, R., 1993: Community-driven tourism planning and residents' preferences, *Tourism Management*, 14, 218–227.

Preston-Whyte, R., 2000: Wine routes in South Africa, in C.M. Hall, L. Sharples, B. Cambourne and N. Macionis (eds), *Wine Tourism Around The World: Development, Management and Markets*, London: Butterworth-Heinemann, 103-114.

Pro-Poor Tourism in Practice, 2004a: *Tourism and the Poor: Analysing and Interpreting Tourism Statistics from a Poverty Perspective*, PPT working paper, No 16. Pro-Poor Tourism Pilots in Southern Africa. [Available at: www.pptpilot.org.za. Accessed July 2006.]

Pro-Poor Tourism in Practice, 2004b: *Developing Local Excursions for tourists – Case Study Briefs No 5*, Pro-Poor Tourism Pilots in Southern Africa. [Available at: www.pptpilot.org.za. Accessed on 5 July 2006.]

Queensland Department of Main Roads, 2001: *Drive Tourism Plan*, Brisbane: Queensland Department of Main Roads.

Queensland Heritage Trails Network, 2000: *Cultural Tourism Incentive Programme 2000–2002*. Brisbane: Queensland Government Department of the Premier and Cabinet.

Queensland Heritage Trails Network, 2006: *Heritagetrails.qld.gov.au* – The Official Website for the Queensland Heritage Trails Network. [Available at www.heritagetrails.qld.gov.au]

Ratz, T. and Puczkö, L., 1998: Rural Tourism and Sustainable Development, Unpublished paper Presented at the Rural Tourism Management: Sustainable Options International Conference, Auchincruive, Scotland, September.

Richards, G. and Hall, D., 2000: The community: A sustainable concept in tourism development?, in G. Richards and D. Hall (Eds.), *Tourism and Sustainable Community Development*, London: Routledge, 1–13.

Rogerson, C.M., 2002a: Tourism-led local economic development: the South African experience. *Urban Forum*, 13: 95-119.

Rogerson, C.M., 2002b: Tourism and local economic development: the case of the Highlands Meander, *Development Southern Africa*, 19, 143-167.

Rogerson, C. M., 2004: Tourism and uneven local economic development: the experience of route tourism in South Africa, in C.M. Rogerson and G. Visser (Eds), *Tourism and Development Issues in Contemporary South Africa*, Pretoria: Africa Institute of South Africa, 399-419.

Rogerson, C.M., 2007: Tourism routes as vehicles for local economic development in South Africa: The example of the Magaliesberg Meander, *Urban Forum*, 18, in press.

Solla, S.X.M., 2002: Pilgrimage and tourism at Santiago de Compostela. *Tourism Recreation Research*, 27, 41–51.

South Downs Tourism Association, 2006: Membership Benefits, [Available on www.southdownsholidays.com.au]. Accessed on 11 January, 2007.]

Telfer, D.J., 2001a: Strategic alliances along the Niagara Wine Route, *Tourism Management*, 22, 21-30.

Telfer, D.J., 2001b: From a wine tourism village to a regional wine route: an investigation of the competitive advantages of embedded clusters in Niagara, Canada, *Tourism Recreation Research*, 26 (2), 23-33.

Telfer, D.J. and Hashimoto, A., 2003: Food tourism in the Niagara region: the development of nouvelle cuisine, in C.M. Hall, L. Sharples, R. Mitchell, N. Macionis and B. Camborne (eds), *Food Tourism Around the World: Development, Management, and Markets*, London: Butterworth-Heinemann, 158-177.

The Cluster Consortium, 1999: *Ecotourism—the Development of Dormant Assets*, Cluster Navigators Limited: Johannesburg.

Tourism Queensland, 2002: Queensland Destination Management Plan. [Available at: www.tq.com.au. Accessed 12 December 2006.]

Turespaña, 2000: Tourism Promotion Strategy, Spanish Tourism Board. [Available at www.spain.info/industry, Accessed on 3 December 2006.]

Turgalicia, 2005: Destination Press Release. [Available at: www.turgalicia.com. Accessed 12 April 2007.]

United Nations World Tourism Organisation, 2001: World Overview and Tourism Topics. Madrid: UNWTO. [Available at www.world-tourism.org. Accessed 19 May 2006.]

United Nations World Tourism Organisation, 2004: Survey of destination management organisations report. Madrid: UNWTO. [Available at www.world-tourism.org. Accessed 19 May 2007.]

Visser, G., 2004: The World Wide Web and tourism in South Africa: the case of Open Africa, in C.M. Rogerson and G. Visser (eds), *Tourism and Development Issues in Contemporary South Africa*, Pretoria: Africa Institute of South Africa, 335-354.

Williams, A. M. and Shaw, G., 1991: *Tourism and Economic Development: Western European Experiences (2nd ed.)*, London: Belhaven Press.

World Bank, 2004: World Development Indicators. [Available at www.devdata.worldbank.org/data-query/. Accessed on 22 May 2007.]

Xacobeo Tourism Organisation, 2006. Picture Gallery. [Available at <http://www.xacobeo.es/2006/index.asp>. Accessed 17 April 2007.]

Yann, Campbell, Hoare & Wheeler, 1999: *Road Travellers Study — Research Report*, Brisbane: Tourism Queensland.

ANNEXURE A: RESEARCH QUESTIONNAIRE: ROUTE TOURISM PRODUCTS

No:

--	--	--

Time Started: _____

Time Ended: _____

South Africa – Draft Questionnaire

Name of Interviewer: _____

Name of the Product: _____

Or No, I wish to remain anonymous _____

Name of Respondent: _____

Contact telephone: _____

Fax Number: _____

Email address: _____

Location (on routes): _____

Physical Address: _____

Interviewed by: _____ Date: _____

Back-checked by: _____ Date: _____

SUBJECT INFORMATION SHEET

GOOD DAY, MY NAME IS MARLIEN LOURENS. I AM CONDUCTING RESEARCH FOR THE COMPLETION OF A MASTERS DEGREE IN TOURISM WITH WITS UNIVERSITY. THE AIM OF THE RESEARCH IS TO IDENTIFY THE CRITICAL SUCCESS FACTORS IN THE DEVELOPMENT OF TOURISM ROUTES AND TO PROVIDE A PLANNING "ROADMAP" FOR THE APPLICATION OF THE CONCEPT IN LOCAL DESTINATIONS. WE ARE INTERVIEWING TOURISM PRODUCTS AND CONSUMERS IN THE MIDLANDS MEANDER AREA AS A CASE STUDY FOR ROUTES TOURISM IN SOUTH AFRICA.

I RECEIVED YOUR DETAILS FROM THE MIDLANDS MEANDER ASSOCIATION AND THEY APPROVED THE PROPOSED RESEARCH TO BE CONDUCTED OF THEIR MEMBERS. THE SURVEY IS COMPLETELY VOLUNTARY AND YOU ARE KINDLY INVITED TO PARTICIPATE. YOUR CHOICE NOT TO PARTICIPATE WILL HAVE NO ADVERSE CONSEQUENCES. SHOULD YOU CHOOSE TO PARTICIPATE YOU MAY DECLINE TO ANSWER QUESTIONS AND MAY WITHDRAW FROM THE RESEARCH AT ANY TIME.

THE QUESTIONNAIRE WILL TAKE APPROXIMATELY 20 MINUTES OF YOUR TIME TO ANSWER. ALL INFORMATION SUPPLIED WILL BE KEPT CONFIDENTIAL. THE INFORMATION OBTAINED WILL ONLY BE DISPLAYED IN AGGREGATE FORM.

SCREENING QUESTIONS (To be filled in for each and every contact)

S1. Are you the owner, partner, manager or key decision maker of this business / enterprise?

Sole owner

1

Co-owner

2

Partner

3

Manager

4

If none of the above *terminate interview*

5

Ask to speak to correct person, set up another appointment if required.

A: Tourism Product Offering

We will start out by noting the type of establishment and the facilities your enterprise provides.

A1. Which of these facilities are offered by your business?

Accommodation :	Bed and Breakfast/Guesthouse	1
	Hotel rooms/Lodge	2
	Self-catering Units/Chalets	3
	Backpackers/Hostel with shared amenities	4
Cultural village/homestead		5
Restaurant/Eatery :	Traditional Food & Beverage	6
	Fast food/Take-away/Kiosk	7
	Licensed bar	8
Retail outlet :	Souvenir/curio/craft shop	9
	Café/spaza shop/general store	10
	Gaming facility/ other recreation	11
Music shows and dance :	Traditional	12
	Other Variety/Concerts (not traditional)	13
Monument park/Historic Site/Memorial		14
Museum		15
Tour Service :	City	16
	Township	17
Venue :	Conference/Meeting	18
	Hire out hall for weddings/themed parties	19
Any Other (please specify) ?		20

A2. And which ONE of these, would you say, is the main attraction of your enterprise?

THE UNDERPINNINGS OF SUCCESSFUL ROUTE TOURISM IN SOUTH AFRICA

A3. Please indicate the size of all these facilities offered by your business?

prompt for all facilities indicated at Q1 (number of beds, delegates, seats, venues)

Type	Size of facility
Accommodation, B&B, guesthouse, units, etc	(total number of beds)
Traditional Food & Beverage Restaurant/Eatery	(total number of seats)
City/Township Tour Service	(total number of vehicles)
Conference venue	(total number of delegates)
Other	

A4. Please indicate the flow of visitors throughout the year. You can do this by attributing a percentage value to each in the table below.

Period	%
Jan-Feb	
March-April	
May-July	
Aug-Oct	
Nov-Dec	

A5. Please indicate the rate charged for each of the facilities provided by this establishment. Simply give me the rate in Rands, according to the breakdown you would quote to visitors, for example, per person per day, or entrance fee for adults, children or pensioners. Please also indicate whether you have a peak-season and off-season rate.

Prompt for all options from A1

Type	How do you charge? (e.g. per person per night/1/2 day tour, full day tours, etc)	Amount charged (Rands)
Accommodation, B&B, guesthouse, units, etc		
Traditional Food & Beverage Restaurant/Eatery		
City/Township Tour Service		
Attraction (Cultural village, museum, historical/memorial sites, etc)		
Conference venue		
Music shows and dancing		
Other		

B: Market Information

Now looking at the market breakdown your establishment serves, several factors need to be considered. To begin with, please tell me;

B1. On average, how many visitors are served by your business? You can indicate this in terms of your business as a whole, or by the various components of your business in either annual, average monthly or weekly amounts.

THE UNDERPINNINGS OF SUCCESSFUL ROUTE TOURISM IN SOUTH AFRICA

Type	Annual visitor numbers in 2004 or	Average number of monthly visitors (2004) or..	Average number of weekly visitors (2004)
Accommodation, B'B, guesthouse, units, etc.			
Traditional Food & Beverage Restaurant/Eatery			
City/Township Tour Service			
Attraction (Cultural village, museum, historical/memorial sites, etc)			
Conference venue			
Music shows and dancing			
Other			
Total			

B1a. Please indicate the percentage that each component of your business contributes to total revenue of the operation?

Business component	% of total revenue derived
Accommodation, B'B, guest house, units, etc	
Traditional Food & Beverage Restaurant/Eatery	
City/Township Tour Service	
Conference venue	
Retail – craft, souvenir, other	
Music shows and dancing	
Other	
	100%

Instruction (Instr) : allow multi answer objects to facilitate all options – must have at least ONE answer

B2. What proportion of your market is foreign visitors compared to domestic visitors (*interviewer pause*) and what proportion of your domestic market is from this province compared to other provinces?

instr : foreign, domestic local, domestic other provinces, must add to 100%

Source Market	% of total	Country of origin (e.g. Germany, Swaziland, France, etc
Foreign		
Domestic		Province of Origin (e.g. Gauteng, KZN, etc)
	Total 100%	

THE UNDERPINNINGS OF SUCCESSFUL ROUTE TOURISM IN SOUTH AFRICA

B3. What is the average length of stay for your visitors? Please indicate separately for your market breakdown (as mentioned in the previous question),

instr : all answer options for Foreign, Domestic, Leisure & Business and Average for ALL according to Q6.

Market	Length of stay
Foreign	
Domestic	
Leisure	
Business	
	(Avg overall)

B4. Guests visit your establishment for different reasons, please allocate what proportion of these options constitute the overall visitor purpose.

Instr : must add to 100%

Market	% of Total Guests
Business – conference/meetings	
Business – general	
Business- government	
Leisure / holiday	
Educational	
Any Other (please specify)	

B5. Guests visiting your establishment might have very specific interests and can be categorized into “niche market segments”. Can you please indicate what percentage of your guests fall within a particular interest group listed:

Niche Segment	% of Total	Niche Segment	% of Total
Nature based tourism (eco-tourism)		Gay tourism	
Hiking, walking, trails, etc		Adventure tourism	
Birding		Dive tourism	
Backpacker /youth markets		Disability tourism	
Culture & heritage		Education and research	
Health and relaxation		Fishing	
Golf tourism		Sports tourism	
Food & Wine			

B6. Please indicate the percentage proportion of the age groups served by your establishment. *(if unknown, encourage respondent to make best guess estimates)* *Instr : must add to 100%*

Under 18 (still in school)	
18-35 (Youth)	
36 – 50	
51 – 60	
61+ (Pensioners)	
Total	100%

B7. What proportion of the groups listed below comprises your visitor profile? And what is the average group size for each of these? *instr : must add to 100%*

Group types	%	Average size
Individuals (families)		
Tour groups		
School groups		
Conference groups		
	100%	

C: Enterprise Development and its Operating Environment

We will now work through the details relating to the development of your enterprise and current business practice. We will cover marketing activities, organizational needs and finance.

C1. Record gender of respondent: (X)

Male Female

C2. What is your age in completed years? (X)

Under 20

20 – 29

30 – 39

40 and over

C3. What is the highest level of education that you have attained. Just give me the letter/alphabet? (x)

D. No formal schooling	
Q. Up to Std 2/Grade 4	
R. Std 3-5 or Grade 5-7	
E. Std 6 or Grade 8	
B. Std 7-9 or Grade 9-11	
M. Matric or Grade 12	
F. Technical diploma, trade or business college <u>prior</u> to completing high school/matric	
L. Technical, trade or business college <u>after</u> high school	
H. University incomplete	
O. University graduate (and higher)	
Don't know/refused/no answer	

C4. Please indicate your years of experience in the tourism industry?

Years

C5. Please indicate if you have any formal training/qualification in tourism? (X)

Qualification	Year

C6. What is the form of business ownership? (X)

Form of Business	<input type="checkbox"/>
Family	<input type="checkbox"/>
Single Entrepreneur/Sole proprietor	<input type="checkbox"/>
Private limited	<input type="checkbox"/>
Joint venture	<input type="checkbox"/>
Publicly held	<input type="checkbox"/>
Others (specify)	<input type="checkbox"/>

C7. How long has this business been in operation? (X)

Less than 1 year	<input type="checkbox"/>
1 to less than 5 years	<input type="checkbox"/>
5 to less than 10 years	<input type="checkbox"/>
10 years and longer	<input type="checkbox"/>

C8. How did you decide what type of business to establish?

Conducted research to find out what the needs were	<input type="checkbox"/>
Consulted with an agency/advisor	<input type="checkbox"/>
I was previously employed in this industry and decided to branch out on my own	<input type="checkbox"/>
Saw a gap/need and followed my instinct/gut reaction	<input type="checkbox"/>
Saw other similar establishments and thought it would be a good idea	<input type="checkbox"/>
I didn't, it was somebody else's idea and I was approached to join them	<input type="checkbox"/>
Other (Specify)	<input type="checkbox"/>

C9. How did you obtain capital to start up this business?

Used my retirement/savings		
Grant funding (if so from which organization.....?)		
Obtained a loan from a bank/organization		
Stokvel		
Loanshark		
Did not need any capital		
Other (Specify)		

C10. How many full time and part time people do you employ in the following categories of experience & qualification? (numeric)

	Full time	Part time
5+ Years experience & qualification(s)		
5+ years of experience and no qualifications		
Qualification with no experience		
No qualification & no experience		

C11a. Are you part of a tourism/community association? (Y/N)

C11b. (If yes,) Please state the organisation/s that you are a member of and the annual membership fee paid by your organisation? *instr : answer objects for a. name of organization(s) and b. membership fee*

Name of Organisation(s) _____ Membership Fee: R _____
 _____ Membership Fee: R _____

C11c. Did you pay a joining fee to be part of the association (Y/N)

C11d. If yes, please indicate how much you paid? R _____

C11e. Please indicate if you contribute any other fees to the association i.e. marketing, training, etc.

_____ (specify)

C11f. (If yes to C12a) How much does it benefit your business to be part of a local association?

C11g. What percentage of your guests comes to you as a result of the marketing and awareness created by your local tourism association?

_____ %

C11h. What are the problems you encounter in your local tourism associations?

C111. What would you want your association to do for your business?

C12a. Is this facility graded? C13b. If so, please state the details?

instr : answer objects for a. grading y/n and b. details – open text

C13a. Do you have links to any tour operations or travel agents or others to bring visitors to your operation? (PROVIDE NAME(S) OF TOUR OPERATORS). C14b. If yes, please state the nature of this relationship. (PROBE THOROUGHLY)

instr : answer objects for a. links y/n and b. open text for nature

C14a. How do market your establishment/operation? Please indicate the percentage of marketing tools used to each tool used to advertise your business..

Tools	% used
Advertising and PR activities : external provider	
Brochures : On-site Distributed	
Web-site	
Exhibitions and trade shows	
Through tourism offices	
Through association activities	
Word of Mouth	
Any other? (Please specify)	

C15. Which type of marketing has been the most effective in bringing in visitors to your operation? Why do you say so?

C16. Do you experience any problems in reaching potential markets? (If unclear, say for example : too far off the main tourist routes, not linked with hotels in the area, not included in brochures/websites etc)

C17a. (Ask if business in operation for more than one year at C8) What is the trend regarding number of visitors to this establishment over the past three (or less) years. Please quantify the proportion of change that has occurred and specify whether this operation has experienced a growth or decline? Let us break it down year by year, starting with 2002 to 2003? And 2003 to 2004? And finally 2004 to 2005?

Year	% growth or decline	
200/2003	+	-
2003/2004	+	-
2004/2005	+	-

C18b. What is the reason for this trend in the past years? (ONLY IF BUSINESS DECLINED OR INCREASED IN THE PAST YEARS) _____

C18c. If applicable, from where do you expect the growth in your visitors numbers to come:

	%
Increase in number of domestic tourists	
Increase in number of foreign tourists	
	100%

Thank you for your time and participation

ANNEXURE B: RESEARCH QUESTIONNAIRE: ROUTE TOURISM CONSUMERS

No:

--	--	--

Time Started: _____

Time Ended: _____

South Africa - Questionnaire

Name of Interviewer: _____

Location (Name of attractions): _____

Physical Address: _____

Interviewed by: _____ Date: _____

Back-checked by: _____ Date: _____

SUBJECT INFORMATION SHEET

GOOD DAY, MY NAME IS MARLIEN LOURENS. I AM CONDUCTING RESEARCH FOR THE COMPLETION OF A MASTERS DEGREE IN TOURISM WITH WITS UNIVERSITY. THE AIM OF THE RESEARCH IS TO IDENTIFY THE CRITICAL SUCCESS FACTORS IN THE DEVELOPMENT OF TOURISM ROUTES AND TO PROVIDE A PLANNING "ROADMAP" FOR THE APPLICATION OF THE CONCEPT IN LOCAL DESTINATIONS. WE ARE INTERVIEWING TOURISM PRODUCTS AND CONSUMERS IN THE MIDLANDS MEANDER AREA AS A CASE STUDY FOR ROUTES TOURISM IN SOUTH AFRICA.

I AM SELECTED TOURISTS VISITING ATTRACTIONS IN THE MIDLANDS MEANDER AREA TO INTERVIEW AND ASK ABOUT THEIR PROFILES AND REQUIREMENTS WHEN VISITING ROUTE DESTINATIONS. THE SURVEY IS COMPLETELY VOLUNTARY AND YOU ARE KINDLY INVITED TO PARTICIPATE. YOUR CHOICE NOT TO PARTICIPATE WILL HAVE NO ADVERSE CONSEQUENCES. SHOULD YOU CHOOSE TO PARTICIPATE YOU MAY DECLINE TO ANSWER QUESTIONS AND MAY WITHDRAW FROM THE RESEARCH AT ANY TIME.

THE QUESTIONNAIRE WILL TAKE APPROXIMATELY 20 MINUTES OF YOUR TIME TO ANSWER. ALL INFORMATION SUPPLIED WILL BE KEPT CONFIDENTIAL. THE INFORMATION OBTAINED WILL ONLY BE DISPLAYED IN AGGREGATE FORM.

Demographics

Gender of respondent:

Male	<input type="checkbox"/>	Female	<input type="checkbox"/>
------	--------------------------	--------	--------------------------

Race of respondent:

Asian	<input type="checkbox"/>
Black	<input type="checkbox"/>
Indian	<input type="checkbox"/>
White	<input type="checkbox"/>
Coloured	<input type="checkbox"/>

Age of respondent:

18 – 24	<input type="checkbox"/>
25 – 34	<input type="checkbox"/>
35 – 49	<input type="checkbox"/>
50 – 64	<input type="checkbox"/>
65 +	<input type="checkbox"/>

Language:

Afrikaans	<input type="checkbox"/>
English	<input type="checkbox"/>
Zulu	<input type="checkbox"/>
Xhosa	<input type="checkbox"/>
North Sotho	<input type="checkbox"/>
South Sotho	<input type="checkbox"/>
Tswana	<input type="checkbox"/>
Tsonga	<input type="checkbox"/>
Venda	<input type="checkbox"/>
Swazi	<input type="checkbox"/>
Ndebele	<input type="checkbox"/>
Other (STATE)	<input type="checkbox"/>

About You:

Q1. (All) Which country do you currently live in?

South Africa	<input type="checkbox"/>
Rest of Africa	<input type="checkbox"/>
South East Asia	<input type="checkbox"/>
North East Asia	<input type="checkbox"/>
Eastern European Countries	<input type="checkbox"/>
Western European Countries	<input type="checkbox"/>
North America	<input type="checkbox"/>
South America	<input type="checkbox"/>
Middle East	<input type="checkbox"/>
Other (specify)	<input type="checkbox"/>

THE UNDERPINNINGS OF SUCCESSFUL ROUTE TOURISM IN SOUTH AFRICA

Q2. Only SA respondents.

Please provide us with the province and town which you originate from? (X)

Gauteng		Northern Cape		Limpopo		Eastern Cape		Free State	
North West		Western Cape		Mpumalanga		KwaZulu-Natal			

Q3. ALL: What is your household income per month (for all the people living in your house)? (Please indicate currency?)

(X)

Rands		Dollar		Euro		Other (specify)	
-------	--	--------	--	------	--	-----------------	--

Less than 5000	<input type="checkbox"/>	20 000 –24 999	<input type="checkbox"/>
5000 – 9 999	<input type="checkbox"/>	25 000 –29 999	<input type="checkbox"/>
9 999 – 14 999	<input type="checkbox"/>	30 000 –39 999	<input type="checkbox"/>
15 000 – 19 999	<input type="checkbox"/>	40 000+	<input type="checkbox"/>

Q4. How many Holidays/weekend breaks/day outings do you take for leisure purposes on an annual basis?

Holidays	_____	(No per annum)
Weekend	_____	(no per annum)
Day outings	_____	(no per annum)

Q5. ALL: What is the main purpose of your visit to the area/region? (X)

Business	<input type="checkbox"/>
Visiting Family or friends	<input type="checkbox"/>
Holiday	<input type="checkbox"/>
Other (specify)	<input type="checkbox"/>

Q5a. All: Who are you traveling with? (X)

i. Alone	<input type="checkbox"/>
ii. Family	<input type="checkbox"/>
iii. Friends	<input type="checkbox"/>
iv. Partner	<input type="checkbox"/>
v. Tour groups	<input type="checkbox"/>
vi. Academic group	<input type="checkbox"/>
Other (specify)	<input type="checkbox"/>

Q5b. (IF v & vi at Q5a, then ASK) How many people form part of your group?

Size	<input type="text"/>
-------------	----------------------

Q6a. FOR FOREIGNERS ONLY: Is this your first visit to South Africa? (X)

Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
------------	--------------------------	-----------	--------------------------

THE UNDERPINNINGS OF SUCCESSFUL ROUTE TOURISM IN SOUTH AFRICA

Q6b. FOR FOREIGNERS ONLY: If not, how many times have you visited South Africa before? (OPEN NUMERIC)

Number of times visited	
--------------------------------	--

Q6c. FOR FOREIGNERS ONLY: How long will this visit to South Africa last? (X)

1 – 3 days	
4 days to 1 week	
1 to 2 weeks	
2 to 3 weeks	
more than three weeks	

Q7. FOR FOREIGNERS ONLY: What is the main reason for choosing South Africa? (OPEN ENDED)

Q8. (ALL) Are you aware of the “tourism brand name” of this destination? – If so what is it called?

Q9. (ALL) How did you come to know about this destination? (X)

Have visited before	
Recommended by someone who visited before	
Tour operator	
Brochure	
Internet search	
Other (specify)	

Q10. What media do you prefer to read/listen/watch to find about travel destinations in SA?

Magazines ~ _____ (specific)

Newspapers: ~ _____ (specific)

Radio stations ~ _____ (specific)

TV Channels

SABC 1 2 3

e-TV

M-Net

DSTV channels _____ (specific)

Internet web sites _____ (specific)

Q11. (ALL) What was your primary motivation to visiting this destination?

Q12. Who made the decision to visit this area? (X)

Partner	
Wife	
Husband	
Children	
Friends	
Other	

Q13 FOR FOREIGNERS ONLY – Was the decision made before or after you arrived in South Africa? (X)

Before		After	
--------	--	-------	--

Q14. (ALL) When did you arrive at this destination?

Day: _____ Month: _____ Year: _____

Q15. (ALL) How many different attractions and/or attractions have you or are you planning to visit in this destination?
(OPEN NUMERIC) _____

Q16. (ALL) What sources of information did you use to help you find your way around the destination? (X) Please specify the details

Type		Specify
Map		
Guide Book (Specify)		
Destination-specific Brochure		
Route-specific Brochure		
Hotel Information		
Tour Guide		
Internet Information		

Q17a. FOR FOREIGNERS ONLY: Approximately how much money have you spent/do you intend to spend in **South Africa**? Pls breakdown **per day** and according to the following categories: Please indicate your average daily spend in South African Rands on **this trip on:** (OPEN UERIC)

Accommodation	R
Transport	R
Food & beverage	R
Souvenirs	R
Activities/attractions/	R
Shopping	R

THE UNDERPINNINGS OF SUCCESSFUL ROUTE TOURISM IN SOUTH AFRICA

Q17b. ALL: Approximately how much money have you spent/do you intend to spend **in this destination**? Pls breakdown **per day** and according to the following categories: Please indicate your average daily spend in South African Rands on **this trip on**: (OPEN UMIC)

Accommodation	R
Transport	R
Food & beverage	R
Souvenirs	R
Activities/attractions	R
Shopping	R

Q18a. ASK ALL: Is this your first visit to this destination? (X)

Yes		No	
------------	--	-----------	--

Q18b. ASK ALL: If not, how many times have you visited the destination before? (OPEN NUMERIC)

Number of times	
-----------------	--

Q18c. ASK ALL: How long is this visit to (destination x)? (X)

Day Visitors		Overnight Visitors	
½ hour		1-2 nights	
1 to 2 hours		3-5 nights	
2 to 4 hours		6-7 nights	
1./2 day		8-14 nights	
1 day		More than two weeks	

Q19. ASK ALL: What form of transport did you use to reach destination x? (X)

Organised by hotel/ accommodation		Brought by a friend/relative	
Hired a taxi		BazBus	
Hired a car		Own private vehicle	
Tour operator		Other (specify)	

Q20. Please indicate the type/s of accommodation that you using in this destination? (X)

Guesthouse /B&B	
Hotel	
Lodge	
Farm stay,	
Backpackers	
Self-catering, etc	
Other (specify)	

Q21a. Which type of accommodation do you normally prefer?

Q21b. Why?

Q22. How did you get to know about the accommodation in the area?

Q23. How did you book your accommodation?

Q24. Please name the top 3 activities that you have or will partake in while staying here?

1:

2:

3:

Q25. Do you think this destination is...

Expensive	
Affordable – value for money	
Cheap	

Your Expectations:

Q26. ASK ALL: Before you arrived, what were your expectations of {destination x}? (OPEN ENDED)

Q27. ASK ALL: And to what extent were your expectations met? (X)

Exceeded expectations	
Met expectations	
Somewhat met expectations	
Did not meet my expectations	
Far from my expectations	

Q28. ASK ALL: What did you most enjoy about {destination x }? (OPEN ENDED)

1: _____

2: _____

Q29. ASK ALL: What did you least enjoy about {destination x }? (OPEN ENDED)

1: _____

2: _____

Q30. ASK ALL: Now thinking about your complete experience at (destination x). How unique would you say your experience was:

(X)

Quite unique	<input type="checkbox"/>
Somewhat unique	<input type="checkbox"/>
Not at all unique	<input type="checkbox"/>

Facilities and Services:

Q31. ASK ALL: Did you use any of the facilities at {destination x }? - Please RATE EACH ONE according to a scale of 1-3, where 1 is poor, 2 is satisfactory and 3 is excellent

A: Signage/Information (X)

	PLEASE RATE (1, 2 or 3)
Information services	<input type="text"/>
Road signage	<input type="text"/>

B: Cleanliness? (X)

	PLEASE RATE (1, 2 or 3)
Toilets/restrooms	<input type="text"/>
Public Facilities	<input type="text"/>
Restaurant/dining area	<input type="text"/>

C: Product Quality & Staff ? (X)

	PLEASE RATE (1, 2 or 3)
General service levels	<input type="text"/>
Attractions & activities	<input type="text"/>
Accommodation	<input type="text"/>
Friendliness of staff	<input type="text"/>
Efficiency of staff	<input type="text"/>
Professionalism of Tourism Staff	<input type="text"/>
Knowledge levels of Tourism Staff	<input type="text"/>

Your Recommendations and Experience:

Q32. ASK ALL: What can this destination do to provide a better experience to tourists? Do you have any recommendations for change? (OPEN ENDED)

Recommendation 1:

Recommendation 2:

Recommendation 3:

Q33. ASK ALL: In your own words, please describe your ideal experience of visiting a place such as {destination x}? (OPEN ENDED)

Q34. ASK ALL: If this experience you are describing, were to be provided to you, would you...(X)

	Yes	No	Don't know
Stay longer			
Visit again in future			
Visit on a regular basis			

Q35a. ASK ALL: Would you recommend {destination x} to people you know? (X)

<u>Yes</u>		<u>No</u>	
------------	--	-----------	--

Q35b. ASK ALL: If NO, why not? (OPEN ENDED)

NO because,

Thank you for your time and participation

ANNEXURE C: RESEARCH QUESTIONNAIRE: MIDLANDS MEANDER ASSOCIATION

Name of Respondent: _____

Tel no: _____

Physical Address:

Interviewed by: _____ Date: _____

INTRODUCTION

GOOD DAY, MY NAME IS MARLIEN LOURENS. I AM CONDUCTING RESEARCH FOR THE COMPLETION OF A MASTERS DEGREE IN TOURISM WITH WITS UNIVERSITY. THE AIM OF THE RESEARCH IS TO IDENTIFY THE CRITICAL SUCCESS FACTORS IN THE DEVELOPMENT OF TOURISM ROUTES AND TO PROVIDE A PLANNING "ROADMAP" FOR THE APPLICATION OF THE CONCEPT IN LOCAL DESTINATIONS. I WOULD LIKE TO ASK A FEW QUESTIONS ABOUT YOUR ORGANISATION - THE MIDLANDS MEANDER ASSOCIATION TO BETTER UNDERSTAND THE ROLE OF YOUR ORGANISATION IN THE SUCCESS OF THE REGION. .

THE QUESTIONNAIRE WILL TAKE APPROXIMATELY 20 MINUTES OF YOUR TIME TO ANSWER. ALL INFORMATION SUPPLIED WILL BE KEPT CONFIDENTIAL. THE INFORMATION OBTAINED WILL ONLY BE DISPLAYED IN AGGREGATE FORM.

1. How long has your association been in existence and how did it start?

2. How many members did you have when you started?

3. How many members do currently have?

4. What percentage of total products in this destination does you organisation represent?

5. How much do you charge for membership – (please give details of various types of membership and costs involved)

6. What services do you offer to your members for this fee?

7. Explain the legal structure of the organisation – section 21, general association, etc....

8. Could you give a rough indication of the total annual/monthly expenses of the organisation?

9. Can you provide a breakdown of expenses in percentages? (example – marketing -50%)

10. Could you give a rough indication of the total annual/monthly income of the organisation?

11. Can you provide a breakdown of income in percentages? (for example – membership fees - 35%)

12. Does your organisation work with any public sector bodies – local, regional, provincial authorities? If so, please explain how...

13. What are your expectations of public sector in respect of assistance to the tourism sector?

14. Does your organisation receive any funding from the public sector – if yes, please state the nature and purpose of the funding – if not, please state why not?

15. What is the key purpose of the association?

16. Are you aware of other organisations in this area that do the same as you? (if yes, how many?)

17. What is the branding and overall marketing concept of your area? (logo? – key selling features, etc)

18. Do you make use of “routes” within your area to sell certain products? If so – please explain how it works....

19. Can you provide a breakdown of types of tourism products in your area? (accommodation, attractions, adventure operators, etc)

20. What marketing activities does the association engage in to market the destination?

21. Do you think that your organisation is successful in its marketing campaigns? (If yes/no, please state why?)

22. Do you compile a calendar of events taking place in your area (if no, please indicate a few major events taking place in your area each year)

23. Can you indicate roughly how many visitors the area receives per annum?

24. Has there been an increase/decrease over the past 3 years – explain?

25. Please indicate the main markets for your region? (Please be very specific for example...day visitors from within the region, foreign overnight visitors, etc.)

26. What are the biggest hurdles that your association had to overcome?

27. What issues does your organisation still face today?

28. Name a few challenges that the tourism enterprises in your area grapple with?

29. What do you and your organisation understand under community tourism?

30. Are there community tourism enterprises that are part of your association – if yes – how many?

31. How does the association engage with the local communities in the area?

32. If a funding programme was designed to assist community tourism in your area – explain how, in your mind, it could be applied to be most useful to you and your organisation..

Thank you for your time and participation