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International Tourism and Changes in the South African Tourism Product in the 1990s: Accomodation and tourist amenities in the Kruger National Park

Chitura, Mildred Maidei

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1. Introduction

PRODUCT AND MARKET

A Survey of Tourism Taste and National Policy, 1920s-90s

Kruger National Park is one of the world's leading wildlife destinations. Straddling the Limpopo and Mpumalanga provinces, it covers nearly 2 million hectares of prime game country that includes "The Big Five": elephant, buffalo, lion, rhinoceros and leopard. To make full use of this natural attraction, and to cater for the demands of visitors, Kruger has a wide variety of accommodation for different shades of visitors –from budget to luxury travellers, from the nature adrenaline junkie of the sleep-in-the-open-and-watch-the-lion type to the more discerning comfort seeker. The 12 main rest camps boast not only housing (guest lodges, safari tents, rest huts and bungalows) but also on-site shops, cinemas, swimming pools and restaurants (www.krugerpark.co.za). It is a truism that one cannot speak of Kruger as 'Big Game Country' without also speaking of its accommodation and related amenities, but this has not always been so.

1.1 Development as a tourist destination

Today Kruger is "the flagship of the South African National Parks", the first national park, the largest, and most well known globally (www.sa-venues.com). Yet this success story belies its modest beginnings as a protected area in 1898, and then a national park on 31 May 1926 (***N**ational **P**arks in **S**outh **A**frica*, 1984). Its progress was as much guided by policy guidelines of the National Parks Act of 1926 and subsequent amendments, as by its natural ability to attract tourists. After its proclamation as a national park, Kruger welcomed its first 850 visitors in 1928 .1, 050, 000 tourists entered the park in 2003 alone, representing a R34-million (26%) increase in profit as the 1 million mark for arrivals was surpassed for the first time (*Sunday Times* 2003/11/23). The fine balance between conservation and tourism business has propelled Kruger to the top 5 ranked South African attractions alongside the Drakensberg Mountains, Kgalagadi Park, Garden Route, and Cape Town (www.southafrica-travel.net 01/09/04). Kruger's pedigree for good wildlife management practices and principles is world-acclaimed (NPSA, 1984).

1.2 South African Tourist Corporation (SATOC)

It is no use to have a great national park but which 'the market' knows nothing about. Central to Kruger's phenomenal success has been a robust marketing policy reaching out to the world. South African Tourist Corporation (SATOC) was set up on 1 August 1947 and was renamed to South African Tourism Board on 1 October 1983. Its brief was "to develop the tourist industry of the Union of South Africa by encouraging persons from elsewhere to visit the Union of South Africa and to travel therein" (*SATOC Annual Report*, 1953). To operationalise this mandate, SATOC opened branches abroad initially targeting the United Kingdom, the United States, Australia, and East and Central Africa and then the rest of the world. Advertising worked on the minds of potential travellers to create demand for the tourism product.

1.3 South Africa's Regional Market

South Africa has competed with other countries in the region for overseas tourists, but excels on account of her varied tourism product, of which wildlife is the major attraction. The African tourist used to wildlife in his/her country is different from the overseas tourist who craves the wilderness; the one would rather be at the beach or in Sun City, the other sees wilderness as escape from the hectic urban environment (*SAR* 1953). Hence if the overseas market underperformed, the regional one provided a fall-back market: in 1960, for example, tourists from the Federation of Rhodesia and Nyasaland (Zimbabwe, Zambia and Malawi) accounted for 117.816 arrivals, 11.763 of them in transit, while Mozambique and East Africa (Kenya and Tanganyika) weighed in with 19.213 and 2.730 respectively (*SAR* 1961). Figures up to the mid-1960s cemented Rhodesia and Mozambique's status as the main African markets (*SAR* 1965: 11). Overseas tourism grew rapidly in the late 1960s, with the region contributing significantly but lagging behind; even then, the 8% increase in foreign arrivals for 1969 represented significant regional increases, for example, Rhodesia 299.697 (12.48%), Kenya 293.314 (11.9%) increase, Uganda 73980 (37%) (*SAR* 1970: 10).

All these increases were in spite of the negative macro-political and economic environment. As Fig. 1 shows, 1949-69 was a positive growth period, the African rate of increase falling steadily by 37%, 27%, 24%, 12% for 1949, 1954, 1964 and 1969 respectively (a yearly average of 24%), with the overseas market steady at 32% in 1949-54, then rising sharply thereafter to 48.6% in 1964, and 58% in 1969. Of the

overseas market, most visitors were Europeans and Americans, with Australasians becoming a significant force only after 1964.

FIG. 1: Tourism Arrivals in South Africa, 1949-69

	1949	1954	1959	1964	1969
African countries	59 675	96 189	133 194	175 783	199 165
Europe	10 444	14 034	19 592	39 854	93 515
Asia	739	668	749	1 314	2 322
America	891	3 246	5 668	9 799	22 115
Australasia	707	926	1 428	2 502	11 124

Source: *Satour Annual Report*, 1970: 12)

In the 1970s global economic recession and domestic political unrest led to a general decline in foreign arrivals. Regional visitors fell by 15.63% in 1976 (*SAR* 1976), the year the Soweto Uprisings took place; by 1978 a 6.2% improvement over the 1977 offered some respite (*SAR* 1978), but the picture remained somewhat depressed for the next decade (*SAR* 1980: 9). The global recession and political unrest eased from 1986, giving a significant boost to tourism arrivals, which recorded a 7.9% increase to 347.442 visitors (**S**outh **A**frican **T**ourism **B**oard **A**nnual **R**eport 1986: 4).

1.4 The Global Market

The 1960s represent the effects of advertising on arrival figures, when a total of 190.485 visitors were recorded in 1961 and 202.157 in 1962 (*SAR* 1962: 20; 1963: 11); many of the overseas visitors were from Europe, America, and Australia. By 1970 the Australian market was increasing at 40% per annum as a result of increased frequency in air traffic, the European market showing a stubborn 18.2% rise in 1968 (*SAR* 1970: 11). Global recession and the energy crisis (generated by the Middle East Crisis and the rise in fuel prices) in the early 70s put a damper on world tourism figures, but the SA destination held steady (*SAR* 1971: 10). The prioritisation of *needs* over *leisure* instilled a selective discipline in tourists that augured well for non-high volume destinations like South Africa. The country capitalized on these 'selective tastes' by intensifying its overseas marketing campaigns, spotlighting special package tours,

drawing attention to its national airline as a link between SA and other destinations, for example the Far East and South America (*SAR* 1974). At any rate, SA was the ideal vacation for affluent and selective tourists searching for new, unique, but affordable destinations (SAR 1975).

According to Bennett (2000: 13), "images and tourist expectations of travel experiences are closely linked in the customer's mind". In making this a central strategy, the **S**outh **A**frican **T**ourist **C**orporation saw how counterproductive it was to have infinite attractions and superb facilities in a strife-torn environment. Tourists had to feel safe to visit and amuse themselves, and spend their money. Herein lay the limits of robust advertising: the Tourism Board could shout itself hoarse abroad, but very often attractiveness was self-advertising. The country's political unrest in the late-1970s and early-1980s was bad for business: after 1976 an all time high of 730.368 arrivals for 1975 turned into a staggering loss of 12.58% for the European and 9.49% for the US markets. In the US, for example, post-Sharpeville South Africa became a victim of bad press, the Montreal Olympic Games were a counter-attraction, and the strong dollar allowed consumer spending in Europe rather than SA (SAR 1976). This power of the media to revere and revile the tourism destination and influence markets has been well noted by Hall and O'Sullivan (1996, in Hall and Oehlers, 2000: 80).

The period just after 1976 there was a culmination of growing anti-apartheid struggles that had been progressively drawing a tight rope around South Africa since the decolonization of Kenya, Tanzania, and Zambia in the 1960s. With the independence of Angola and Mozambique in 1975, the pressures to isolate South Africa grew. The formation that year of the Southern African Regional Tourist Council (SARTOC) with Swaziland, Malawi, and Mauritius, but not with regional countries sympathetic to nationalist movements, could be interpreted as a self-serving publicity stunt by SA to portray its 'un-isolated' status as a destination. It sounds instructive that SATB was responsible for all publicity, conducted through its branch offices abroad (*SAR* 1975).

It took two years to recover from the effects of the 1976 Soweto Uprisings, the industry recording an 8.92% increase on the 1977 figure of 589.025 to 641.588 in 1978; the overseas figure rose 34.795 or 11.51% of the overall increase. An advertising blitz to convince tourists that the country was still a safe destination in spite of political strife was launched using films, posters, media advertisements, and travel expos throughout the world. The rand was also weaker against major currencies, making it

cheaper to travel to South Africa (SAR 1978). Just like the Zimbabwe Tourism Authority (ZTA) has been doing since 2000, the SATB continuously invited overseas travel agents to come and get "a true and complete picture" on the situation in the country so as to report back and advise clients that politics was having no effect on safety and security.

The result of this rigorous advertising momentum was a record net foreign exchange earning of R476 million in 1980 after travel costs over the 1979 figure of R402 million. The 700.000 mark set for 1975 was surpassed; 702.794 arrivals were recorded, and 275.521 – a 7.9% increase over the 1979 figure – came from mainland Europe alone. The board made sure to impress foreign tourists so that they would be good ambassadors and advertisers on return to their countries: as Hall and Oehlers (2000) have noted, the word of mouth carries a powerful message as people relate their first hand experiences (SAR 1980: 8). The UK (figures apparently omitted from the South African Tourist Corporation report for 1980) remained at the summit of the market, with Germany's 20% increase to 58.989 arrivals nudging aside the US – which came in strong with a 9.9% increase to 48.725 visitors – into second place, followed by France, Switzerland, and Italy at 4-5 times the German figure. Australia remained a distant 5.033 arrivals despite choking up a 13% increase, but the biggest improvement was Brazil's 46% leap over the 1979 figure to 2.837, and Japan's 35% to 6.952. The 35% decrease for Argentina, and Australasia's modest 6% increase to 19.160 were down mainly to capacity limitations on the routes, perhaps emphasizing aviation's position in tourism (SAR 1980: 9). In spite of this phenomenal growth, SATOC was wary of continuing world recession and inflation. More importantly, it warned of a shortage of peak-season accommodation in higher grade hotels in December-March, which exposed the country's inability to "accommodate all those who wished to visit it during the period" (SAR 1980:9).

South Africa's steady growth came at a time of decline in international tourism: world figures, for example, eased by 1.3 % to 280 million arrivals in 1982. To meet this recession, the World Tourism Organization urged marketers to accept changing tourist tastes and address *value* and *price*, and not merely the destinations (SAR 1982). To be successful, the destination must not simply forge strategic alliances, but also compete. A competitive product was one that was accessible, affordable, safe, and with attractive facilities (Bennett, 2000). Despite this emphasis on "destination mix", the less favourable figures for overseas visitors in 1983 showed the

limits of marketing strategies in a time of entrenched recession and inflation *beyond the control of national policy*. The 405.414 tourist arrivals represented just 4% of the 1982 figure of 389.155 (SATBAR 1983). The fact that a State of Emergency was declared in some areas to curb political unrest combined with world recession as forces beyond Satour's control (SAR 1985); while it could counter moral reservations about the political situation or system through vigorous marketing propaganda, the increased violence hit at the very safety of tourists. The power of the word of mouth could poison the tourist destination if tourists' personal safety, and life, was threatened.

By 1986, therefore, the ability of marketing to counter negative perceptions of the destination's 'context' had run its course: bad politics became bad business. If the post-1982 recovery was down to a decline in political unrest, measures against 'bad press' overseas, and a weaker rand, these gains were replaced in 1986 by a decline of 26%, that is, a record low of 297.060 vis-à-vis the 405.597 for 1985 (SATBAR 1986: 4). Through a combination of improving political prospects and new wildlife-centred marketing strategies, the glamour was back by 1989 – a record breaking 930.393 visitors, representing a 15.6% increase over the 1988 figure (SATBAR 1989: 4).

1.5 The Domestic Market

SATB seems to have focused its tourism promotion on the international market with very little effort on the domestic, until that market became highly volatile due to world recession and bad publicity in the late 1970s and early 80s. The response was the 1983 tourism policy document, which targeted domestic tourism as a top priority (SATBAR 1983). This is the same year that the South African Tourist Corporation (SATOC) changed to become South African Tourism Board (SATOUR). The policy was therefore drafted under SATOUR, which was now the international marketing board of South Africa. Domestic tourism was not insulated from the global economic tremors: rising travel costs created a tendency among tourists to take shorter, cost-saving weekend excursions nearby rather than longer annual holidays or long-distance family retreats. When they visited, the tourists stayed in caravans, private homes and flats rather than hotels (SATBAR 1983, 1985). Yet unlike the international market, domestic tourism was something that SATOUR could do something about through, inter alia, policy interventions.

A Domestic Tourism Committee set up in 1985 wasted little time in carrying out a research survey of domestic tourism patterns, and set up structures for regional tourism. The committee's first domestic advertising campaign in 1985 under the slogan *See The World In Your Country* was a barrage of commercials in the audiovisual, print, and electronic media, and publicity tours for media staff (SATBAR 1985: 9-12; 1988: 4). The dividends were not slow in coming: different sectors of the tourism industry recorded significant increases in business in 1986-7, even if the increase in arrivals was not matched by carrying capacity, such that accommodation shortages were experienced in some areas in 1988 (SATBAR 1987). Perhaps a highlight of this media blitz was the *1988 Get-up-and-Go Guide* pamphlet of which 340.000 copies were printed for distribution. By 1989, some conscious efforts were being made to de-racialise the clientele beyond the overwhelmingly white base. An increasing number of blacks, particularly businesspeople, extended their interest beyond just conferences and seminars to entrepreneurial and vacation opportunities, while school trips for children also increased significantly (SATBAR 1989: 7).

1.6 The Wildlife Strategy in Destination Marketing

To cater for unstable short and long term factors, SATB and then SATOUR reacted swiftly to changes to prevent any disruption in tourism traffic. There was no single 'silver bullet' that the board adhered to, with adjustments being formulated as situations arose. However, wildlife and game parks occupied a consistently central place in the various initiatives, representing what tourists believed to be "a truly exclusive African experience." In the 1960s and 1970s, it also appears that SATOC's marketing policy gravitated towards a "desire to attract more, and wealthier, visitors" (Ghimire, 1997: 3-6) from overseas rather than local or regional ones. Within this broader framework, a selective approach that directed publicity "to potential travellers to the republic rather than to the masses", or taste-specific advertising media and products, was deployed (*SAR* 1962: 14). Under the theme *Come See For Yourselves*, the selective marketing campaign of 1969/70 zoned its packages according to specific overseas countries. For example, a direct mail system to "top echelon" potential tourists, with the by-line *Have you ever heard the sun go down over Skukuza?* targeted 400.000 American, 80.000 Canadian, and 200.000 European recipients (*SAR* 1970: 14). Because Kruger was the most popular wildlife destination

to South Africa it was used as a 'hook'. Almost all the tourist tours would end up in Kruger Park.

Come See For Yourselves is typical of a flexible reaction to changing tourist patterns in long haul travel, the emphasis shifting to "the personal(ised) touch" (*SAR* 1970: 9), the objective being to lure the highest quality flow of tourists. The content was "nature herself", which were bywords for animal life and indigenous people, perhaps highlighting a racist element in the commodification of African culture as nature, but not white culture. The graphics were significant improvements on previous ones, as a reflection of their affluent audience, i.e. two multi-fold colour brochures presenting "special interest activities, wildlife and birdlife" (*SAR* 1970: 14). Selective marketing is one of the lasting legacies of *Come See For Yourselves*, even when other marketing features were replaced by more innovative approaches (SATBAR 1983: 11).

The other enduring element was the wildlife/game park image, the "quintessentially *animal*" draw-card of any African destination (Rasool and Witz, 1996). Wildlife photography and filming (in black and white) began as pastime in the early-1920s, and then rapidly became a key marketing feature on practically all brochures for the overseas market. Kruger National Park was popular with wildlife photography and filming tourists in the 1930s and 1940s; David Bunn has shown how 'waterhole work' – photographic capture of animals drinking water – found privileged space in international magazines like *The Field*, and took "the project of museum habitat-group dioramas" (developed by Akeley in New York's American Museum of Natural History) a step further (Bunn 2003: 202).

The overseas tourist of the 1940s for example, was looking for the ultimate world-exclusive encounter with "native, animal and plant life in their native setting amidst scenery of surpassing beauty" (Hoare, 1947: 84). In the 1960s, the park could afford the visitor "unspoiled nature" moulded by human conservation (*SAR* 1962: 14). As Beinart & Coates (1995: 77) have shown, post-1924 Afrikaner nationalism ensured that "game animals became a recurrent motif in white South Africa's conception and projection of itself" (Beinart & Coates, 1995: 77). South Africa was "game country", the image of wildlife inscribed on all tourism advertising material from postage stamps to cigarettes, to national airlines. The main attraction in the 1920s was game viewing; everything else came second, such that any hardships tourists encountered mattered little as long as they saw game. The overseas tourist, escaping stressful city life, pollution and high consumerism at home, found this "wilderness experience" good

therapy for "technologically multiplied shock" (Bunn 2003: 208). Nor was this escape confined to overseas tourists; in the 30s and 40s white South Africans sought post-World War therapy, and rejuvenation from the hectic work in mines and factories in the wild.

In the wake of the 1976 Soweto Uprising, SATOC deployed the "game country" image to counter bad press, with promotional material dominated by photographs of Skukuza, Hluhluwe and Table Mountain. The serenity of nature was manipulated to reassure entrepreneurs that South Africa was a safe and attractive tourist destination (*SAR* 1976). As usual the media was enlisted to float adverts, to substantially influence images of destination areas (Hall and Oehlers 2000:80). In 1986, for example, "the graphic wildlife series with its humorously ambiguous captions" accounted for the increase in tourist receipts during 1987 as much as the decline in political unrest. In April 1987, it was rerun in the UK, West Germany, and France, where it had been warmly received judging by the numbers of "enquires and firm bookings" received (SAR 1987:5). In Australia, the series was run during the Rugby World Cup in the image of a springbok wearing rugby boots with the *Don't Keep Passing The Buck – Come And See The Real Game* logo; the result was 1.100 immediate responses from Australia and 1.070 from Canada (SATBAR 1987).

The rise of the 'greens' in the 1960s-70s had an impact too on the wildlife image. It was in the late 1960s and 1970s that people worldwide became concerned about environmental issues such as pollution and destruction of natural ecosystems, an awareness contributing to and also resulting from a proliferation of environmental non-governmental organizations and conferences worldwide. The first international conference was held in Stockholm in 1972 where issues concerning the state of the environment were on the agenda (Pace 1996 cited in Leal). As concern over the state of the environment grew, attention began to be called to coastlines, beaches and wildlife. The conservation awareness shifted tourist trends and tastes/preferences: overseas travellers became sensitive to the environmental practices and fate of their destinations. To "satisfy the (environmental) needs of its target markets" (Hall 1997), SATB had by 1971 adopted conservation into its marketing strategy, even if the mere presence and world acclaim of its parks already showed its environmental commitments (*SAR* 1971: 9). Needless to say, tourism entrepreneurship and conservation in South Africa were not always mutually compatible given the mutual

threats and synergies between profits and standards for sustainable utilization (NPSA 1983).

The register in the marketing campaigns, for example *Discover The RSA* (1973), suggests a strong conservation ethic, even if it was designed to curry the favour of the wealthy overseas market, both as individual tourists and as corporate investors. *Discover the RSA* is described by SATOC (SAR 1973:31) as "one of the most advanced tourist promotional documents yet produced anywhere" and carrying "a strong conservation message". This and other brochures like *Have You Ever Heard The Sun Go Down Over Skukuza?* played a big part in setting a new arrivals record of 533.898 for 1973 SAR 1973:31). Other than print media, SATB also mobilized two wildlife film productions, *To Catch A Rhino* and *Lake Wilderness*, the latter honoured by the Belgian Ministry of National Education and Culture as "the best tourist film with the greatest educational value" at the Tourist and Folklore Film Week Exhibition in Brussels (SAR 1973:16). These films were designed to capture the conservationist audience with their attention to South Africa's "excellent" conservation practices, to entice prominent overseas people (for example the conservationist-travel writer John Hines) so that they could see Eden and tell the story on return home. In 1988, Hines could conclude that South Africa was "probably the world leader in conservation", having seen "the animals enjoy priority place and still have the wide space to be truly wild". Hines returned to the UK as a publicist on behalf of SA (*Satouring*, August 1988: 14).

Hines was one of several carefully selected publicists to be invited to come and see for himself. By 1961, SATB had seen the need for "publicists connected with the tourist trade, travel agents and international carriers [to] feel goodwill towards South Africa" by giving them access to "first-hand knowledge" of the destination (SAR 1961: 25). In that year, for example, officials from the Spanish Ministry of Information and Tourism, 6 Italian travel agents, 17 Britons and Europeans including a well known German journalist, Egon Schleinitz, came to South Africa and upon return home gave the country's attractions good press in Germany, Austria and Switzerland (SAR 1961: 27). In 1963, SATOC 's invitations included James McAnally, feature writer for the *New York Times*, Tessa Mase of *Time* magazine in Brazil and the *Millionaire's Guide to the World*, Jack Denton Scott, a US travel-writer, and J. Kimmins of the Nairobi Travel Service (SAR 1963:29).

SATOC also used wildlife to market safari tourism to overseas professional hunters. Again, as in conservation, a well-known Swedish author, lecturer and journalist, Kjell Collin, was invited under the Overseas Guest Programme in 1953. At the end of his trip, Collin remarked: "South Africa will probably be the most popular hunting ground of tourists in the future" (*SAR* 1953:30). Fifty years later his words remain true to South African tourism. Evidence for the 1980s points to a well coordinated promotion at overseas hunting exhibitions like Safari Club International in Las Vegas in January 1988 and the *Hunting Lapa* in Sun City Super Bowl (November) (*Satouring* December 1988). These clubs were attended by hunting operators, booking agents, and journalists, the latter to see and report how hunting could also be conservation. The role of the Professional Hunters Association of South Africa in these clubs made it a promotional body in itself; its spatial location in trophy hunting country solidified SA's competitive edge and marketability (*Satouring*, 1989:9)

For a long time, SATB had simply advertised what they had for the tourist to come and consume, and not what the tourist demanded them to supply (Keyser 2002). Noticing the rise in conservation tastes among overseas tourists in the early 1970s, the board reoriented its product to answer this demand; it was merely a question of amplifying awareness about its top ranking among the best conservation countries in the world (SAR 1971: 9). Even among domestic tourists, SATB's policy was that "the cultivation of selective segments of South Africa's European visitor sources—particularly promotion of special interest packages" – would be "richly rewarded" (SAR 1972: 2). To gauge tourist demands and expectations, SATB invested in market research (SAR 1973); tourism, therefore, became just like the fashion industry, dependent on supply and demand, on people's opinions, attitudes, values and what they expect to see and experience (Prosser, 1994). Such readjustment was not limited to overseas but domestic tourism as well, since both used the same facilities (SATBAR 1983).

The turn to demand-driven tourism shifted attention from the mass to the individual taste, to an individualized model of *components* enunciated by Bennett (2000). For instance, natural attractions like wildlife, beaches and climate, man-made geophysical bodies like the Gold Reef City (Johannesburg) and the Union Buildings (Pretoria), and "culture" (history, religion, and ways of life) were all balanced to meet the clients' expectations (Keyser 2002). This matching of product (supply) and market (demand) is what Keyser termed "destination and product development". It is

precisely this model that could unlock accommodation development in Kruger National Park, which had initially followed the supply model, after which it has since adopted a more vigorous market-driven strategy. The developing of package tours was not a problem: the country was blessed with a rich variety of "world class conservation, splendid scenery, unspoiled beaches, good food and wines and a good year round climate" (SAR 1972: 2). Following the International Marketing Conference at Oudtshoorn in August 1978, a new focus on "best selling strategies" mooted the concept of a "product within the product", which targeted specific areas within the overall SA destination (*SAR* 1978:11). Kruger National Park, the Eastern Transvaal, and the coastline (especially Table Mountain and Durban) were the first to be included in this product marketing initiative, dubbed *South Africa – A World In One Country* (*SAR* 1978:20). So effective was this demand-driven initiative that SATB set up a special department responsible for product development. Summing up this initiative, SATB defined Product Development as "the action involved in planning, designing and compiling specific tour products, its prime function being the conversion of the motif *SA – A World In One Country* into a viable marketing proposition" (*Satouring* 1987: 5; *SAR* 1978:20).

1.7 Conclusion

The brief preamble above has shown two critical interactions between the outside and the inside, that is, the tourist out there and the product waiting for arrivals. The development of marketing prior to 1990 does not conform to any single pattern of the destination mix, while the demand-supply theory seems to vary over time. Hence, even at periods when the destination was safe, no amount of marketing genius would bring in tourists reeling from world recession. At other times, it was the uniqueness of the product that attracted even the few tourists who could afford to visit. Sometimes no amount of advertising could overcome the negative impact of political unrest, or a strong currency that made the destination expensive. Increasingly, where destinations had "offered what they could", as tourists became sensitive to issues like the environment, unique variety, and pricing, SATB and later SATOUR was forced to reformulate its policies. Significantly, much of the "changing" became demand-driven, demanding changes in policy as well as infrastructure that would ultimately please or discourage the tourist. So if for a long time SATB played on the "Big Game Country" image, even that was not enough by the 1980s. SATOUR was faced with the task of

driving stakeholders towards a consumer-sensitive design of infrastructure, especially accommodation, to which the report now turns.