

Impact of poaching on the marketability of safari lodges in the Eastern Cape

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Integrative Summary

This research is presented in three sections. Section 1 presents the research report in an academic paper format. Section 2 provides a comprehensive literature review and Section 3 describes the research methodology and methods employed during the research.

The tourism industry is the fastest growing sector within the South African Economy, with over 2.6 million foreign tourists visiting South Africa each year. Wildlife, landscapes and scenery are cited as the primary attractions for visiting the country, with over 45% of tourists visiting at least one wildlife or nature reserve during their stay in South Africa (Kerley et al., 2011:2). Sixty percent of those tourists travelled for leisure purposes, with 643,883 of the tourists utilising safari lodge accommodation during their visit (Ruggles-Brise, 2013). The Eastern Cape achieved 3.1% of those tourist arrivals, with a bed-night contribution of 734,339, compared to the 16.8% (1.9million) and 10.5% (1.07million) for Mpumalanga and Limpopo provinces respectively (Ruggles-Brise, 2013).

The Eastern Cape lodges represent less than half the bed-nights achieved by Mpumalanga and Limpopo lodges. Due to the number of possible bed-nights available to lodges in the Eastern Cape, it is increasingly important for individual lodges to provide a unique experience, in order to be competitive in attracting guests (Saayman, 2013:81). This was used form part of the foundation to this research in determining the marketability of three lodges in the Eastern Cape, which was derived from the attractiveness of the lodges, determined by guests visiting the lodges.

This research follows on from four previous surveys commissioned by INDALO, the Eastern Cape Private Nature Reserve Association in 2004 (Sims-Castley et al. 2004), 2006 (Langholz et al., 2006), 2008 (Snowball et al., 2008) and 2011 (Kerley et al., 2011). Part of the research was to identify the main attractions of the reserves. These previous surveys provided a foundation for this research to follow on investigating guest motivations for visiting the three sample lodges and to determine

visitor perception of poaching and whether it would impact their motivations for visiting the reserve.

In order to address the goals of the research qualitative data was gathered during survey interviews conducted at the three sampled reserves. Seventy five (75) guests were interviewed, equally over the three reserves. Quantitative data was also gathered during the interview surveys, utilising Likert scale questions, prompting guests to choose their top attractions, from which basic descriptive statistics were used to analyse the data being able to determine possible trends amongst respondents and lodges.

Results verified guest motivations from the previous surveys, confirming that game viewing, especially the “Big 5” remained the most important attraction for visitors to the reserves while the availability of natural scenery and landscape, high end accommodation and service, the proximity to the garden route and being located in a malaria free area were also seen as attractive attributes of the lodges as per the previous surveys. Where the gap in the research was indicated based on guests perception of poaching and whether it would impact their motivations for visit these lodges, impacting that lodges marketability (attractiveness). Results indicated that if they were unable to view the iconic ‘Big Five’ at the reserve due to the extent of poaching. Respondents indicated that the impact would likely and very likely impact their decision to choose the reserves over another reserve that could. Indicating the potential impact that poaching would have on lodges if they were to lose their iconic species which would spell the loss in attractiveness and therefore marketability.

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Section 1: Academic Paper

1.1 Abstract

The research was conducted with the goal of assessing the impact of poaching on the marketability of safari lodges in the Eastern Cape. This research followed on from four previous surveys commissioned by INDALO, the Eastern Cape Private Nature Reserve Association in 2004, (Sims-Castley et al., 2004) ,2006 (Langholz et al., 2006), 2008 (Snowball et al., 2008) and 2011 (Kerley et al., 2011). Part of the research was to identify the main attractions of the reserves. These previous surveys provided a foundation for this research to follow on investigating guest motivations for visiting the three sample lodges and to determine visitor perception of poaching and whether it would impact their motivations for visiting the lodges.

In order to address the goals of the research qualitative data was gathered during survey interviews conducted at the three sampled reserves. 75 guests were interviewed, equally over the three reserves. Quantitative data was also gathered during the interview surveys, utilising Likert scale questions, prompting guests to choose their top attractions, from which basic descriptive statistics were used to analyse the data being able to determine possible trends amongst respondents and lodges.

Results verified guest motivations from the previous surveys, confirming that game viewing, especially the 'Big Five' remained the most important attraction for visitors to the reserves while the availability of natural scenery and landscape, high end accommodation and service, the proximity to the garden route and being located in a malaria free area were also seen as attractive attributes of the lodges as per the previous surveys. Where the gap in the research was indicated based on guests perception of poaching and whether it would impact their motivations for visit these lodges, impacting that lodges marketability (attractiveness). Results indicated that if the respondents were unable to view the iconic Big Five at the chosen reserve due to the extent of poaching, it would "*likely*" and "*very likely*" impact their decision to choose the reserve over another reserve that could. Indicating the potential impact that poaching would have on lodges if they were to lose their iconic species which would spell the loss in attractiveness and therefore marketability.

1.2 Introduction

The tourism industry is the fastest growing sector within South Africa's economy (Ruggles-Brise 2012), with a direct contribution of ZAR 79.5bn (2.7%) to the country's gross domestic product in 2011, rising by 5.7% in 2012 and a further 4.3% in 2013 with an annual increase expected of 4.3% annually from 2012 through to 2022, contributing, ZAR 128.2 billion to the South African economy (Ruggles-Brise, 2013). With over 2.6 million foreign tourists visiting South Africa each year, landscapes, scenery and wildlife are cited as the primary attractions to visiting the country, with over 45% of tourists visiting at least one wildlife or nature reserve during their stay in South Africa (Kerley et al. 2011:2). Sixty percent of those tourists travelled for leisure purposes, with 643,883 of the tourists utilising safari lodge accommodation during their visit (Ruggles-Brise, 2013). The Eastern Cape achieved 3.1% of those tourist arrivals, with a bed-night contribution of 734,339, compared to the 16.8% (1.9million) and 10.5% (1.07million) for Mpumalanga and Limpopo provinces respectively (Ruggles-Brise, 2013).

Within the context of this research, a bed-night is defined as one person per bed, per night as a measure of occupancy (Lewis, 2008). Eastern Cape lodges represent less than half the bed-nights achieved by Mpumalanga and Limpopo lodges, as outlined in the data above (Ruggles-Brise, 2013). Due to the number of possible bed-nights available to lodges in the Eastern Cape, it is increasingly important for individual lodges to provide a unique experience, in order to be competitive in attracting guests (Saayman, 2013:81). This formed part of the foundation to this research in determining the marketability of three lodges in the Eastern Cape, which were derived from the attractiveness of the lodges, determined by guests visiting the lodges.

The research aims to follow on from previous research commissioned by Indalo, the Eastern Cape Private Nature Reserve Association who commissioned four survey-based assessments of the socio-economic significance of ecotourism-based private game reserves in the Eastern Cape. These surveys were conducted in 2004 (Sims-Castley et al., 2004), 2006 (Langholz et al., 2006), 2008 (Snowball et al., 2008) and 2011 (Kerley et al., 2011). As part of the investigation conducted within these

surveys, respondents were asked why they had been attracted to the reserves they had visited. The results from all four surveys indicated that viewing the 'Big Five' and providing "an authentic wildlife experience" remained the most important attractions for visitors to the reserves, while the availability of natural scenery and landscape, high-end accommodation, excellent service and fine dining were also seen as attractive attributes of the lodges (Kerley et al., 2011:2).

This research followed on from the above surveys by investigating the current, main attractions represented by three private safari lodges in the Eastern Cape to determine each lodge's marketability. All three lodges were chosen as they all offer the 'Big Five' species and have all had poaching incidents. Due to confidentiality, all three lodges have asked to remain anonymous within the research. Utilising this information, the research then investigated the potential impact of poaching of iconic species such as lion, elephant and rhino on the marketability of the three lodges, based on the impact on the desired attractions as determined by each lodges' visiting guests.

Previous research on guest perceptions, preferences conducted by Bresler (2007), research by Bruyere et al.(2007) and Saayman (2013, 2014) was used to form a framework as a means to discussing and comparing the three reserves. Bresler's (2007) study investigated whether wildlife viewing at private game reserves in South Africa, creates a memorable and differentiated experience as a motivation as to why guests are attracted to safari lodges. Research by Bruyere at al. (2007) looked at tourist motivation behind visiting three national parks in Kenya, and Saayman (2013, 2014) gives an insight into visitor motivation and the attractiveness of the "Big 5", and how important this attraction is in securing bed-nights. This formed the foundation from which the localised study was conducted, with the addition of investigating the potential impact of poaching on the marketability of the three sample reserves. The latter aspect has been noted as a gap in the literature, with no clear data available on the impact of poaching of visitation of reserves or wildlife experiences.

Muth and Bowe (2008:11) define poaching as "any act that intentionally contravenes the laws and regulations established to protect wild, renewable resources, such as plants, mammals, birds, insects, reptiles, amphibians, fish, and shellfish. These

behaviours most often are illegal harvesting activities, but they also may include the illegal sale, purchase, transport, possession, and use of wild resources or their parts that are protected by law.”

Research conducted by Adhikari et al. (2005) and Wilson and Tisdell (1999) was used to inform the approach taken by this research with regard to the impact of poaching. Adhikari et al. (2005) conducted a stakeholder perspective survey, looking at the economic incentives and poaching of the one-horned rhinoceros in Nepal and its effects on the country's reserves. Wilson and Tisdell (1999) looked at the non-consumptive tourism resource of sea turtles in Australia. They surveyed numerous hotels, tourism operators and conservation groups with regard to the importance of sea turtles to tourism and the effects of poaching on visitor numbers. This paper's research could become important for South African reserves, as with the increasing competition, lodges are put under pressure to attract and maintain bed-nights, in a market demanding the 'Big Five' as one of its main prerequisite attractions (Saayman, 2013). The research could aid lodges in understanding the importance of their attractions as a means of marketing and could outline the potential impact poaching could have on attracting guests to their lodges.

1.3 Literature review

In order to research the impact of poaching on the marketability of safari lodges in the Eastern Cape, it is important to understand the concept of marketability and its relationship to the consumer decision making process, looking at primarily the purchase decision when determining the marketability of the three safari lodges being sampled. The literature review builds a foundation for the research, providing an insight into the concept of marketability, and its ability to attract based on its attractiveness, desirability, characteristics and attributes from which motivates guests and customers alike, in choosing a product or a destination. The review then looked at literature focusing on guest motivations for visiting safari lodge destinations, giving an insight into previous literature on the subject. The review then focused on the concept of poaching and its impact on the concept of marketability, which is seen as a gap in the research.

1.3.1 Marketability.

The American Society of Appraisers Business Valuation Standards (2002) defines marketability as being highly valued by investors and the relative absence (lack) of marketability generally reduces an asset's fair market value. This definition interlinks with Menger's (1976:232, cited in Stenkula 2010:2) theory of marketability where he likens marketability to the liquidity of money, and being able to transfer a product into cash, indicating the attractiveness of a product to the consumer and its ability to be sold quickly providing revenue for the seller. Furthermore, Zaccai (1994:234) defines marketability as "where the physical, social and emotional needs of the consumer are solved when purchasing a desired product". Stenkula (2010:5) defines marketability as the "ease at which a good can be sold, indicating its attractiveness to the buyer". Marketability is further defined in literature by Jones et al (2005:10) as "what appeals to customers when choosing a product". Dawson (2013:11) defines marketability of a product as its relative attractiveness and desirability to a buyer. Saayman (2013:79) defines marketability within the safari industry as providing "a product that is most desired by your clients."

From the above, it's clear that the literature surrounding the use of marketability focusses on the appeal, desirability and attractiveness of individuals, products or places as a means to being marketable to the consumer and its ability to be bought or visited as means of competitiveness. All literature defining marketability relates directly to a consumer, a buyer and travellers. Therefore making it important for the reader to understand briefly the consumer decision making process as it will give an insight into the motivations of guests in determining the marketability of the three safari lodges and the literature that would provide a framework for this research.

1.3.2 Consumer decision making process and its role in marketability

It was important to understand the notion of the consumer decision making process when determining the marketability of the three safari lodges. Although this research was focused on investigating guest motivations for visiting the three sample reserves, it was also important to understand the consumer decision making process and ultimately the motivation behind the 'purchase' decision made when choosing a

particular lodge. The consumer decision making process, according to Kotler (2002:153), is the combination of processes undertaken by consumers in regard to a potential market transaction before, during, and after the purchase of a product or service. Kotler (2002:155) further indicated that the decision making process is made up of five stages: the recognition of a problem or need; searching for information on the need; evaluation the alternatives; the purchase decision; and the post purchase decision. This definition and notion by Kotler (2002) interlinks with earlier literature by Crompton (1979, cited in Hsu et al 2008:290; Devesa et al., 2009:547) who view the consumer decision making process within a travel destination context. Crompton (1979) indicated people are motivated to travel because they are “pushed” into traveling by internal reasons or factors, or because they are “pulled” by a destination’s attributes. Following on from Crompton’s theory (1979) on why travellers choose destinations, Devesa et al. (2009: 258) indicated that the “push factors” were more related to internal or emotional aspects such as the desire for escape, rest and relaxation, adventure, or social interaction. “Pull factors” were linked to external, situational or cognitive aspects, of which, attributes of the chosen destination , leisure infrastructure and cultural or natural features are all attributed to attracting the traveller and ultimately in the choice to visit that destination. In research by Hsu et al. (2008:290) their article indicated Crompton’s “Push, Pull” as the method to understanding travel motivations, highlighting the push motivation as being useful in explaining the desire to travel while the pull motivations are useful in explaining the actual choice in destination.

As important as the consumer decision making process is, this research focused on the purchase decision of the process, focusing on the pull motivation theory as a means to determining guest motivation or attraction to the three sample lodges being reviewed as a means to determining marketability and the potential impact that poaching would have on these lodges’ ability to attracting guests. Poaching and the impact of poaching will be reviewed later on in this literature review. To understand pull motivations and its relationship to the purchase decision, it is important to review examples of this in the literature to give the reader a clearer perspective to the research being undertaken in this thesis.

1.3.3 Marketability and pull motivations.

The following section highlights examples of marketability that focus on the consumer decision making process , primarily the purchase decision or choice decision , and the role played by pull motivations in the attractiveness of the product, individual and destination as a means to providing a framework to determining the marketability of the safari lodges being sampled.

Zamkova and Blaskova (2013:219) look at marketability of organic products in Greece as a means of enhancing the appeal of the products to increase their sales and attractiveness to the younger generation. Cracolici and Nijkamp (2008:337) indicate the marketability of different tourist destinations in Italy as key to the destination being able to attract interest from travellers, they focused on a tourist destination as no longer being seen as a set of distinct natural, cultural , artistic or environmental resources, but as an overall appealing product available in a certain area, a complex and integrated portfolio of services offered by a destination that supplies a holiday experience which meets the needs of the tourist. They concluded that the success of the destination depended on their tourist competitiveness in terms of their attractiveness characteristics or attributes that motivated tourists to visit those particular destinations. Following on from this, Kozak (2000:222) indicated that the appeal and attractiveness that makes a destination marketable is based on its unique characteristics and products it offers, prompting the buyer to choose that destination , and according to Gunn (1997 as cited in Hu & Wall 2008:617) it is the attraction of the destination that pulls visitors too it. Further research by Etudor-Eyo (2014:80) on marketability of universities in Nigeria focused on the appeal and desirability of its courses as means to attracting students. The main focus of the study was to investigate reasons why students chose the University of Uyo in Nigeria and the extent to which each reason determines the students' choice. Students chose Uyo based on the attractiveness of the institutions characteristics (low tuition, well-credentialed faculty, research orientation and financial strength) which appeared as the important motivators in raising the institutional attractiveness and drawing students to choose the university. A similar study by Brown (2007:30), examined the factors that make a medical school attractive to potential students and found that categories of medical school attributes stood out as positive motivators of choice,

those where academic factors (reputation) , location factors (city preferences) and intangibles (gut feelings and recommendations). All literature above indicate that key characteristics, attributes or attraction are key to determining the decision to either, buy, visit or choose that particular product, institution or destination. Now by understanding this notion with relation to marketability based on attractiveness, it is important to review existing literature surrounding guest motivations to visit safari lodges, to provide a platform to this research.

1.3.4 Marketability motivations / push factors within a safari lodge context.

This research was inspired by previous research commissioned by the Wilderness Foundation and INDALO, the Eastern Cape Private Nature Reserve Association. They commissioned four survey-based assessments of the socio-economic significance of ecotourism-based private game reserves in the Eastern Cape (Sims-Castley et al., 2004; Langholz et al., 2006; Snowball et al., 2008; Kerley et al., 2011). The surveys were to investigate the social economic profiles of private game reserves in the Eastern Cape, circulating questionnaires to the private reserves. The questionnaire was divided into five sections dealing with: the establishment of the reserve, tourism related activities, employment, conservation issues and policy issues. This research focused its attention on the tourism related activities as an insight into guest motivations. These surveys were conducted in 2004 (Sims-Castley et al., 2004), 2006 (Langholz et al., 2006), 2008 (Snowball et al., 2008) and 2011 (Kerley et al., 2011) and was used as a framework to this research, providing an insight into guest motivations based on what attracted them to the reserves.

As part of the investigation conducted within these surveys, respondents were asked why they had been attracted to the reserves they had visited. The results from all four surveys indicated that viewing the 'Big Five' and providing "an authentic wildlife experience" remained the most important attractions for visitors to the reserves while the availability of natural scenery and landscape, high-end accommodation, excellent service and fine dining were also seen as attractive attributes of the lodges (Kerley et al., 2011:2).

With results from all surveys being very consistent, Kerley et al. (2011:9) indicated that it sends a very clear message to current and future private game reserve

owners, “that the most important asset is wildlife. But this wildlife must occur in as natural a setting as possible and in conjunction with a high quality tourist accommodation and service.”

This current study followed on from the above surveys, investigating the current, main attractions represented by three safari lodges in the Eastern Cape to determine each lodge’s marketability. Utilising this information the research then investigated the potential impact of poaching on the marketability of the three lodges, based on the impact on the desired attractions as determined by each lodges’ visiting guests.

Previous research conducted by Bresler (2007), Bruyere et al. (2007) and Saayman (2013, 2014) was used to form a framework as a means to discussing and comparing the three reserves. Bresler’s (2007) study investigated whether wildlife viewing at private game reserves in South Africa, creates a memorable and differentiated experience as a motivation as to why guests are attracted to Safari lodges. The study conducted by Bresler (2007) was to establish the behaviour and experience of tourists while visiting privately owned game lodges in Mpumalanga and the Northern Province, with the aim to unveil the consumer behaviour of wildlife tourists and to delineate the component and levels of the game lodge product in order to ascertain what attracts visitors to the game lodges and what they find is most appealing. The core attraction according to Bresler’s (2007) results was for tourists to experience something unusual, to have an intimate new emotional experience, and the fascination with seeing animals in a genuine wilderness, especially the ‘Big Five’.

The ‘Big Five’ animals are the “holy grail” of the nature based tourism industry according to Goodwin and Leader-Williams (2000) and are seen as the most important flagship species for conservation (Williams, Burges & Rahbek, 2000), a term coined by big game hunters to refer to the five most dangerous species to hunt on foot in the African savannah (Mellon, 1975 as cited in Macmillan et al. 2012:1). In reality the ‘Big Five’ consists of six species namely the lion, leopard, elephant, buffalo, black rhino and the white rhino and are seen as key to the marketing strategies of private reserves in attracting guests (Williams et al., 2000 as cited in Macmillan et al 2012:1). This interlinks with Saayman (2013, 2014), who’s research looked into visitor motivation and the attractiveness of the ‘Big Five’, and how

important this attraction is in securing bed-nights. Saayman (2013) conducted a survey to investigate the importance of the 'Big Five' to overnight visitors to the Kruger National Park. Saayman (2013) indicated in his research that the conservation authorities use the Big Five as an attraction and is seen as a major draw card in attracting foreign tourists to the park, and indicated that when asked, tourists are quick to tell which of the five they had seen (2013:79). He also informed that the reserves used the 'Big Five' as a brand and that it remains one of the major draw cards and therefore a main motivation for visiting the reserve. Kerley et al. (2003:13, 2007:180) follows on from this research which looked at visitors only being concerned with large charismatic species when visiting reserves. Kerley et al. (2003) , indicated visitor perception of the Big Five and the importance of viewing elephant to the satisfaction levels of visitors to the Addo National Park indicating that visitors where only concerned with viewing charismatic mega fauna. Where in research by Bruyere at al. (2007:1465) looked at tourist motivation behind visiting three national parks in Kenya, indicating that the reason for tourist visitation to the reserves was to view wildlife and cultures and the entire satisfaction of the stay hinged on viewing the few charismatic species, from which allowed the reserves to develop tourist-orientated marketing strategies aimed at the 'Big Five' as a means to increase visitation.

The 'Big Five' or charismatic species are seen as flagship species according to Walpole and Leader-Williams (2001:543) and are used by reserves, destinations and lodges as a means to increase their marketability through advertising, encouraging tourists with the opportunity to view these flagship species in their natural environment. They indicated whilst the market identifies with the high profile charismatic species, providing examples of tigers, dolphins, rhinos, elephants and gorillas, there are efforts to enhance the public profiles of other animals to be seen as flagship species, but indicated that reserves understood the underlying fact that "big, cute, and furry" (Walpole and Leader-Williams 2001:544) sells and that every opportunity to use this notion to attract visitors should be used.

According to (Goodwin & Leader-Williams, 2000 as cited in Lindsey et al., 2007:21) the 'Big Five' are the most popular species amongst tourists and the most expensive to conserve, either because they cause damage to human livelihoods giving

examples of elephants, leopards and lions, or are targets for poaching such as rhino and elephant and require expensive anti-poaching operations.

It is the later aspect which was the focus of this research within a South African perspective and is seen as a gap in the literature is that of poaching and the impact it has on the marketability (attractiveness) of the safari lodges in the Eastern Cape. In order for the reader to fully comprehend the impact that poaching potentially has on the marketability (attractiveness) of the safari lodges sampled, a brief review of literature surrounding poaching and the impact poaching has had, providing a basis to this research.

The issue lies in South Africa and Africa that the demand for rhino horn, lion bones and elephant ivory affects the very attractions that motivate guests to visit the reserves (Boynton, 2014:4). According to the Department of Environment Affairs (2014), TRAFFIC (2014) and Boynton (2014), there are now more than 30,000 African elephants a year being poached for their ivory and in South Africa, which has more than 85% of the continent's remaining rhino, they are losing a rhino every 8 hours to poachers. Lion populations are also threatened, with five lions a day being killed illegally. At this rate these signature species could no longer exist in the wild within a generation or two (Boynton, 2014:1).

According to the Department of Environmental Affairs (2014) report on poaching, the current rate of rhino poaching has escalated with no real end in sight, a total of 333 rhino were killed in 2010, 448 in 2011, 668 in 2012, 1004 in 2013 and already over 748 rhino as of August of 2014. The African Parks Organization in their recent report published in June (2014), highlight the horror of poaching statistics, particularly of elephant and rhino, and its links to organised crime and the global war on terror (African Parks, 2014).

Research conducted by Adhikari et al. (2005) and Wilson and Tisdell (1999) was used to inform the approach taken by this research with regard to the impact of poaching.

Adhikari et al. (2005) conducted a stakeholder perspective survey, looking at the economic incentives and poaching of the one-horned rhinoceros in Nepal and its effects on number of visitors visiting the Royal Chitwan National Park. Survey results

indicated that the rhino was an important attraction to the reserve amongst its visitors, when asked if they would still choose this reserve if the rhino was not there, 40% said they would not have chosen the reserve. When hotel and tourism operators were surveyed, they had said that tourist numbers had dropped due to poaching of the rhino, as rhino numbers had decreased dramatically making it harder for tourists to view them, which was having a subsequent effect on their occupancies and financial returns.

Wilson and Tisdell (1999) had similar impacts on tourism, when looking at the non-consumptive tourism resource of sea turtles in Australia. They surveyed numerous hotels, tourism operators and conservation groups with regard to the importance of sea turtles to tourism and the effects of poaching on visitor numbers. The research looked at visitors being attracted to the coastal areas of Northern Australia to view the beaching, laying and hatching of sea turtles on an annual basis, but due to the increase in poaching, illegal harvesting of eggs and other human impacts, sea turtle tourism is being impacted by fewer numbers of turtles appearing each year to lay their eggs, which in turn has had a negative effect on visitor numbers.

Another example of specialised tourism being impacted by poaching can be viewed in Dan Stiles' (2013) article published in the Africa Geographic magazine entitled, "Africa's Lost Apes". Stiles (2013) describe the loss of nearly 4000 gorillas and chimpanzees a year to illegal poaching and trafficking to supply the demand from the Far East. Stiles (2013) indicated that due to the pressure on the wild populations, it has had an impact on tourism and those establishments that use gorilla viewing as a major tourism draw card. Poaching and trafficking has reduced viewing numbers, forcing remaining family groups of gorillas deeper into the forests, making it increasingly difficult for tourists to view these charismatic species (2013:49).

An article written by Carrington (2014) highlighted the impact of poaching, hunting and human conflict role in impacting tourism. The article indicated that the major draw cards of the Namibian tourism industry were the desert-adapted lions, elephants and rhino. Indicating that only a handful of lucky people have had the opportunity to view Namibia's desert dwelling lions and that they are highly sort after by tourists. With recent increase in poaching, hunting and human conflict has seen the senseless killing of numerous dessert black rhino, dessert elephants and dessert

lion. With most recently with the killing two of Namibia's most sought after attractions, two desert male lions named Roth and the Terrance Male. According to Carrington (2014) the tourist industry in Namibia utilising the attraction of desert dwelling animals, especially those of the 'Big Five', are already feeling the effects of the losses and would continue to get worse if a solution is not done to curb the losses of the iconic species.

Although not every story has to be doom and gloom, in an article by Caitlin (2014:48) indicated the impacts of poaching of iconic species such as rhino, elephant and lion are to the marketability (attractiveness) of the Majete National Park in Malawi. The national park in the early 80's was a thriving tourism destination, offering the 'Big Five' as a major attraction to the reserve, but with the introduction of poaching, the reserves iconic species, lion, elephant and rhino were all but lost, with the last elephant being killed in 1992. This had a dramatic effect, with the tourism all but stopping, with lodges and accommodation reduced to ruins in a few short years. Today it is a very different place, with the reintroduction of the iconic species and the government's involvement in curbing poaching and illegal activity, has brought the national reserve back to its former glory, and ear marking it as once again a major tourism destination being able to offer once again the iconic species it once lost (Carrington, 2014:50).

This current research could become important for South African reserves, as with the increasing competition, lodges are put under pressure to attract and maintain bed-nights, in a market demanding the 'Big Five' as one of its main prerequisite attractions. The research could aid lodges in understanding the importance of their attractions as a means of marketing and could outline the potential impact poaching could have on attracting guests to their lodges.

1.4 Methodology

This section details the research methodology and research method that was used in investigating the impact of poaching on the marketability of safari lodges in the Eastern Cape. This section outlines the goals of the research, the research paradigm, population and sample description, data collection and analysis and interpretation will be discussed. This section then discusses validity, reliability, the ethical considerations and limitations of the research that was conducted.

1.4.1 The objective(s) of the research

The primary objective of this research is to determine the marketability of three safari lodges in the Eastern Cape and investigate the impact of poaching on that marketability.

The secondary objectives are:

- 1:** Investigate guest motivations for visiting three sample lodges in the Eastern Cape
- 2:** Determine visitor perception of poaching and whether it would impact their motivations for visiting these three lodges.
- 3:** Compare results between the three safari lodges surveyed and make recommendations for improving their marketing.

1.4.2 Methods, procedures and techniques

The paradigm adopted is that of post-positivism. This paradigm aims to enquire information in more natural settings, collecting more situational information, and determining the meanings and purposes that individuals ascribe to their actions (Koekemoer & Mostert, 2010:13).

This research methodology was primarily conducted using exploratory and qualitative research methods, with some quantitative data aiding qualitative discussions. Qualitative survey interviews were the method used to conduct this research at three private game reserves in the Eastern Cape. Quantitative data was

also be gathered during the interview surveys, utilising Likert scale questions, prompting guests to choose their top attractions, from which basic descriptive statistics can be analysed to determine possible trends amongst respondents. The data collection was conducted in the first two weeks of August 2014 (during high season), where five days were allocated to each lodge to collect data and conduct surveys.

1.4.3 Population and sample size

Guests (from now on referred to as Respondents) of the three sample safari lodges were the focus point of the research. This would give the research a unique perspective of respondents who had already chosen that particular reserve and to form the basis of the research with regard to attractiveness and their perception of poaching and the impact it would possibly have if they were to make their decision again.

The potential population between the three reserves if running at full occupancy during the survey period would be 1650. The population was calculated by the number of bed nights available between the three lodges at full capacity during the data collection period of 15 days (five days per lodge). Lodge 1 (20 bed nights), Lodge 2 (54 bed nights) and Lodge 3 (36 bed nights) giving a total of 110 bed nights between the three lodges per data capture day giving a potential population of 1650, The initial proposed number of respondents for this research was 25 respondents per reserve (five surveys per day) as a means of conducting this research. 25 respondents per reserve were calculated as the optimum number of survey interviews the researcher could conduct during the respondent's free period (see research limitations) over the research period of 15 days, divided equally between the reserves to allow a comparison to be conducted, making it a total of 75 respondents. This was achieved with 75 short five-minute qualitative survey interviews being conducted.

1.4.4 Data Collection

Data for this research was collected by means of structured, face to face qualitative survey interviews. Interviews were conducted from the 1st to the 15th of August 2014.

Respondents were chosen randomly and were approached during free periods between daily reserve activities. The researcher introduced himself politely and asked respondents “would you mind participating in some research?” This was to allow all possible respondents to have the opportunity to decline or volunteer for the research. Interview survey questions (see Appendix 1) were designed to ensure that the interview process took approximately between 5 to 10 minutes in length, giving flexibility with regard to interest from the respondents.

1.4.5 Data analysis

For survey interviews conducted with guests, thematic analysis of the qualitative data was presented in narrative format, where cross case analysis was conducted deducing patterns appearing across the different survey respondents towards the attractiveness of the reserves and potential impact of poaching. Cross-comparative analysis was conducted between the three lodges to determine differences in data and potential impacts. Predominately qualitative data was used from the interviews with the use some quantitative frequency tables, having been used to analyse guest responses, allowing the researcher to deduce qualitative information to aid in the provision of recommendations.

1.4.6 Limitations

1. The time period from which to survey guests would be during rest periods (between activities), which would limit the amount of potential guests to be surveyed.
2. Language and literacy of respondents needs to be taken into account when considering responses and may limit results.

1.4.7 Validity and reliability

In order to ensure that the research reflect what is taking place (valid) and is credible (reliable), data was gathered randomly when conducting survey interviews with respondents. Hand-written notes were taken during interviews as well as brief recordings of the interviews utilising recording properties on the researcher's phone, this was to ensure reliability and accurate recording of all information.

1.4.8 Ethical Considerations

All reserves that offered to participate in this research were contacted beforehand and the purpose and scope of the research was detailed prior to permission being granted by the reserve managers for the research to be conducted.

It was agreed upon for the purposes of confidentiality, that all reserve names as well as respondent names to be kept anonymous. Respondents were approached randomly and were asked, if they would mind participating in the research, and were given the chance to decline or volunteer. The research interview questions do not ask for respondent's names, or any demographic information allowing for complete anonymity of respondents participating in the research.

Research questions (see Appendix 1) were also designed not to add unwanted pressure on the lodges participating in the research. This was seen as a potential concern for reserves allowing the research to be conducted. This was mitigated by explaining that all questions related to generic information pertaining to all reserves and are not reserve specific.

1.5 Results

This section will consist of two sections, each of which summarises the findings of the interviews with respondents sampled from the three sampled reserves. The first section briefly (high level) provides a background to the lodges/ reserves used in the research to provide an understanding of the principle being research in determining overall its marketability (attractiveness). The second section will address the three goals of the research, namely the investigation of respondent motivations for visiting the three sample lodges and to determine their perception of poaching and whether it would impact their motivations for visiting the lodges. In doing so, compared the results between the three safari lodges surveyed.

1.5.1 Background (description) of the Lodges/ Reserves in the research.

Due to confidentiality agreements, names of each of the three lodges of which respondents have being sampled have been kept anonymous and therefore represented in this research as Lodge 1, Lodge 2, and Lodge 3.

A brief description of the lodges are given prior to looking at the results collected, which provide a platform to what the results represent and allows for a comparative analysis to be viewed between the lodges.

The three lodges that were sampled also participated in the 2004, 2006, 2008 and 2011 studies conducted by INDALO and the Wilderness Foundation (Sims-Castley et al., 2004, Langholz et al., 2006, Snowball et al., 2008 and Kerley et al., 2011). The three reserves use wildlife-based ecotourism as their primary means of business. They are all Big Five game reserves and provide five-star accommodation and service. All reserves are situated approximately 120 kilometres from Port Elizabeth (Kerley et al., 2011) and range in size from 6000 hectares (ha) to 14000 (ha). The three reserves sampled range from one lodge to five lodges. The accommodation offered by the three reserves include lodges, guest houses, chalets and suites and are able to accommodate between 24-114 guests when fully occupied.

1.5.2 Survey Interview Question Results.

The following data was collected in relation to goals 1 and 2 of the research, namely the investigation of guest motivations for visiting the three lodges being samples and

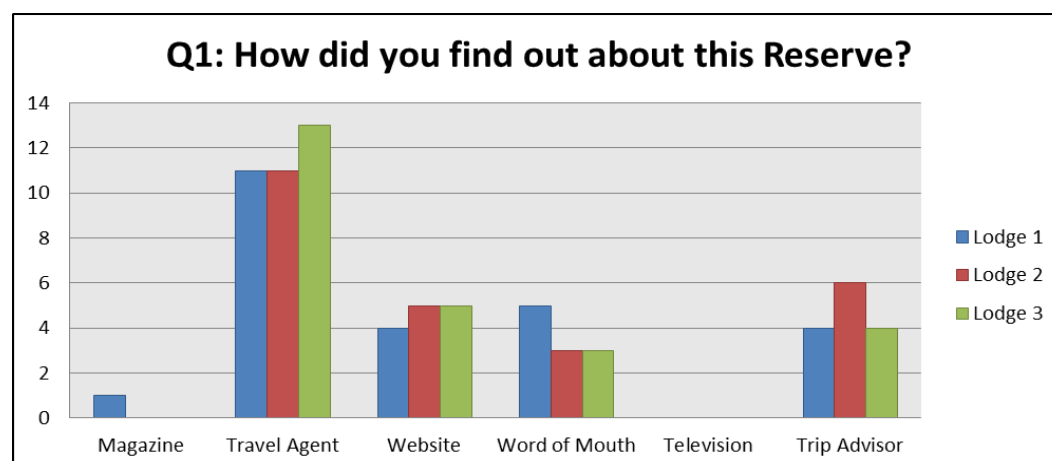
to determine their perception of poaching and whether it would impact their motivations for visiting that lodge/reserve. Twenty-five respondents from each reserve were interviewed giving a total interviews conducted to 75.

1.5.2.1 Question 1: How did you find out about this Reserve / Lodge?

This question was to determine the main vehicle used by guests to investigate, inform, persuade, and attract them into choosing the reserve. The results are outlined below in Table 1 and Graph 1. This could also aid reserves into understanding which vehicle is more influential in aiding the attraction of the reserves.

Table 1: Marketing vehicles used to choose the reserves as determined by guest responses?

Combined: How did you find out about this reserve?					
Vehicles	Lodge 1	Lodge 2	Lodge 3	Total Responses	%
Magazine	1	0	0	1	1%
Travel Agent	11	11	13	35	47%
Website	4	5	5	14	19%
Word of Mouth	5	3	3	11	15%
Television	0	0	0	0	0%
Trip Advisor	4	6	4	14	19%
Total	25	25	25	75	100%



Graph 1: Summary of marketing vehicles used in by respondents when determining the choice of reserve.

Results from respondent interviews at the three lodges, utilised numerous vehicles to find out about the reserve.

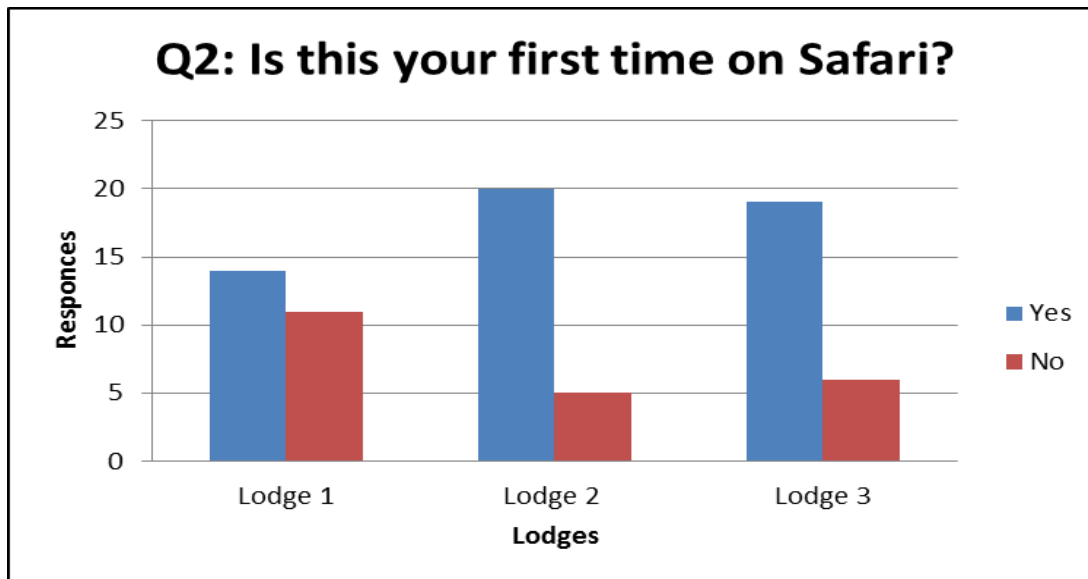
When combining all respondent responses across the three lodges, it is clear with the majority of respondents at 47% (35 respondents) utilised travel agents as their means of obtaining information regarding the lodges, followed by the official website and trip advisor both at 19% (14 respondents). Word-of-mouth was indicated by 11 respondents, thus 15% of respondents, with only one person indicating they had utilised a magazine, and no respondents using television.

1.5.2.2 Question 2: Is this your first time on safari?

This question was designed to determine what proportion of guests that are visiting the reserves are first time or experienced safari goers, as this could have an impact on their motivation to visit the reserves. The results are shown below in Table 2 and Graph 2.

Table 2: Summary responses to determine whether respondents were first time Safari travellers.

Combined: Is this your first time on safari?					
Answer	Lodge 1	Lodge 2	Lodge 3	Total Responses	%
Yes	14	20	19	53	71%
No	11	5	6	22	29%
Total	25	25	25	75	100%



Graph 2: Summary response to whether guests were first time safari travellers.

Lodge 1 had 56% (14 respondents) response rate from respondents indicating that they were first time safari travellers, with 44% (11 respondents) having been on safari before. Of the 11 respondents indicating they had been on safari before 8 of them indicated that they had been on safari outside of South Africa, mainly Botswana and Tanzania were the other 3 respondents indicated they were experienced safari travellers and were repeat guests at the lodge. Lodge 2 had an 80% (20 respondents) response rate to being first time safari goers, and only 5 respondents (20%) indicated they had been on safari before. Respondents who had been on safari before were experienced safari goers, and had visited the reserve on previous occasions. Lodge 3 had a 76% (19 respondents) to being their first time on safari. 24% (6 respondents) indicate they had been on a safari before. With 3 of those respondents indicating they were repeat guests at the lodge. When combining all respondents, an overwhelming majority of respondents interviewed were first time safari travellers at 71% (53 respondents) and 29% (22 respondents) indicating that they had been on safari before.

1.5.2.3 Question 3: What attracted you to this Reserve/ Lodge? What made you choose this reserve over other reserves in the Eastern Cape?

This question follows on from the question presented to respondents in the 2004, 2006, 2008 and 2011 surveys conducted by INDALO (Sims-Castley et al., 2004,

Langholz et al., 2006, Snowball et al., 2008 and Kerley et al., 2011), from which respondents were asked what had attracted them to the specific reserves. This survey asked respondents from their perspective to name - if they could - the **5 main** (5 responses per respondents) reasons they were attracted to the reserves they were staying at. The following results outlined in Table 1 are what they indicated as the main attractions to the reserves as a means of determining the marketability (attractiveness) of the three reserves. This information was used when discussing the impact of poaching on the marketability of safari lodges in the Eastern Cape.

Question 3: Lodge Summary Response results:

Table 3.1: Lodge 1 response results from respondents indicating the 5 main reasons they were attracted to the reserve.

Lodge 1: What attracted you to this reserve?			
Ranking	Responses	# responses	%
1	Wildlife / Game viewing/ Big 5	25	100%
2	Landscape and Scenery	21	84%
3	Accommodation	20	80%
4	Malaria Free	14	56%
5	Proximity to Garden Route	13	52%
6	Food	7	28%
7	Quality Service / Staff	6	24%
8	Price	5	20%
9	Cheetah	4	16%
10	Quite and Tranquil	3	12%
11	Spa Facilities	2	8%
12	Size / Boutique	2	8%
13	Attention to Detail	2	8%
14	Birding	1	4%
Total Responses		125	500%

Following on from previous research conducted in 2004, 2006, 2008 and 2011 (Sims-Castley et al., 2004, Langholz et al., 2006, Snowball et al., 2008 and Kerley et al., 2011), the results of this research from respondents from Lodge 1 remain constant with 100% (25 respondents) of respondents indicating that wildlife/game viewing / Big 5 remain their most import attraction when deciding on the reserve, with 84% (21 respondents) indicating that the natural landscape and surrounding scenery as being important attractions, followed by 'Five Star' accommodation 80% (20 respondents), malaria-free 56% (14 respondents) and the proximity to the Garden Route 52% (13 respondents) as the 5 main reasons indicated by respondents as the main attraction for choosing this reserve. The opportunity for viewing cheetah were indicated by 4 of the respondents as their main reason for visiting the reserve, although can be considered as part of the game viewing motivation, it is important to note that Lodge 3 does not have cheetah.

Table 3.2: Lodge 2 response results from respondents indicating the 5 main reasons they were attracted to the reserve.

Lodge 2: What attracted you to this reserve?			
Ranking	Responses	responses	%
1	Wildlife / Game viewing/ Big 5	25	100%
2	Landscape and Scenery	20	80%
3	Accommodation	14	56%
4	Proximity to Garden Route	13	52%
5	White Lion	12	48%
6	Malaria Free	9	36%
7	Quality Service / Staff	5	20%
8	Honeymoon	4	16%
9	Variety of Activities	7	28%
10	Spa Facilities	4	16%
11	Size / Boutique	4	16%
12	Kids Program	3	12%
13	Proximity to Airport	3	12%
14	Quality Food	2	8%
Total Responses		125	500%

Lodge 2, like Lodge 1, remained fairly consistent with the previous surveys conducted. 100% of respondents indicated that viewing wildlife, game viewing and the Big 5 as their primary attraction to the reserve they were visiting. This was followed by "landscape and scenery" (80%), "accommodation" (56%), "proximity to the Garden Route" (52%). Lodge 2, unlike any other lodge in the area, offers the opportunity to view the endangered white lion in the wild, and was indicated by 12 (48%) respondents as an important attraction to the reserve.

Table 3.3: Lodge 3 response results from respondents indicating the 5 main reasons they were attracted to the reserve.

Lodge 3: What attracted you to this reserve?			
Ranking	Responses	# responses	%
1	Wildlife / Game viewing/ Big 5	25	100%
2	Landscape and Scenery	21	84%
3	Malaria Free	15	60%
4	Proximity to Garden Route	15	60%
5	Accommodation	10	40%
6	Rhino	9	36%
7	Kids Program	7	28%
8	Price	5	20%
9	Quality Staff and Service	4	16%
10	Proximity to Beaches	4	16%
11	Variety of Activities	3	12%
12	Quality Food	2	8%
13	Birding	2	8%
14	Honeymoon	2	8%
15	Birding	1	4%
	Total Responses	125	500%

Lodge 3 represented similar results to Lodges 1 and 2, indicating 100% of respondents indicating that "game viewing", "wildlife" and or the "Big 5" were their

primary attraction for visiting the reserve. This was followed by “landscape” and “scenery” at 84%, “malaria-free” and proximity to the “Garden Route” each representing 60% (15 respondents). Accommodation was rated lower at 40%, compared to Lodges 1 and 2 which were at 80% and 56% respectively. 36% of respondents indicated that they had specifically chosen this reserve to view rhino, specifically to see one rhino that was involved in a horrific poaching incident and survived.

Results are unanimous across the board for all three lodges sampled and verifies findings captured in the 2004, 2006, 2008 and the 2011 studies (Sims-Castley et al., 2004, Langholz et al., 2006, Snowball et al., 2008 and Kerley et al., 2011), that “game viewing together with an authentic wildlife experience, particularly the Big Five”, is regarded as the most important draw card in attracting visitors to the reserves, with most respondents also mentioning “natural scenery and landscape” of the reserves as a draw card as well. Accommodation, the proximity to the garden route and being located in a malaria-free environment were also rated highly by respondents. Results from the three reserves indicated that each reserve had a unique attraction, which was not available at the each of the other reserves. Lodge 1 the opportunity to view cheetah, Lodge 2 opportunity to view the endangered white lions and Lodge 3 a survival story of a poached rhino.

1.5.2.4 Question 4: Out of the list of motivations given, what is the most important attraction of this reserve for you?

This question was presented to respondents to clarify from their perspective which attraction is the most important for them, when choosing the particular reserve. The following results indicate in Tables 4.1-4.3 their responses.

Table 4.1: Lodge 1 most important attraction as indicated by respondents.

Lodge 1: Most important attraction			
1	Game Viewing/ Big 5	22	88%
2	Accommodation/size/ F&B	2	8%
3	Scenery	1	4%
Respondents		25	100%

Table 4.2: Lodge 2 most important attraction as indicated by respondents.

Lodge 2: Most important attraction			
1	Game Viewing/ Big 5/ white lion	20	80%
2	Kids Program	1	4%
3	Accommodation	1	4%
4	Honeymoon Package	1	4%
5	Activities	1	4%
6	Value for money	1	4%
Respondents		25	100%

Table 4.3: Lodge 3 most important attraction as indicated by respondents.

No 1 Attraction for Reserve 3			
1	Game Viewing/ Big 5/ Rhino	23	92%
2	Honeymoon	1	4%
3	Children Friendly	1	4%
Responses		25	100%

Across the three lodges, Lodge 1 88% (22 respondents), Lodge 2 80% (22 respondents) and Lodge 3 92% (23 respondents) unanimously indicated that “Game Viewing”, ‘Big Five’ and or specific species of the ‘Big Five’ as the most important attraction for them when choosing the reserve. This has stayed consistent with previous research conducted in the 2004, 2006, 2008 and the 2011 by (Sims-Castley et al., 2004, Langholz et al., 2006, Snowball et al. 2008 and Kerley et al., 2011). With “viewing wildlife,” and seeing the ‘Big Five’ as the main attraction. Which is not consistent is that in Lodge 2, 4% (1 respondent) and Lodge 3, 4% (1 respondent), indicated the importance of child friendly facilities and honeymoon options as being main attractions for them in choosing the reserves, where in the previous four surveys, Landscape and Scenery were seen as important attractions.

1.5.2.5 Question 5: What are your top five most important fauna to see during your stay?

This question was presented to respondents as all indicated that game viewing and wildlife as part of their main attraction to the reserve, it was necessary to ask respondents their top five fauna to determine the importance of certain animals in the reserve which could be important when discussing the impact of poaching element to this research. Results are outlined in Tables 5.1-5.3

Table 5.1: Lodge 1 summary responses to respondents top five Fauna.

Lodge 1: Top 5 fauna			
Rank	Animal	# Responses	%
1	Lion	25	100%
2	Elephant	23	92%
3	Rhino	23	92%
4	Cheetah	13	52%
5	Leopard	12	48%
6	Giraffe	9	36%
7	Antelope	4	16%
8	Birds	4	16%
9	Zebra	3	12%
10	Warthog	3	12%
11	Aardvark	2	8%
12	Hyena	1	4%
13	Caracal	1	4%
14	Jackal	1	4%
15	Buffalo	1	4%
Responses (25x5)		125	500%

The top five most important fauna to be seen during their stay were lion with 100% (25 Respondents) response rate, elephant and rhino at 92% (23 respondents), cheetah at 52% (13 respondents) and leopard at 48% (12 respondents). Other species such as giraffe 36 % (9 respondents) antelope and zebra were also sort after animals to view during their stay.

Table 5.2: Lodge 2 Summary of responses to respondents top Five Fauna.

Lodge 2: Top 5 fauna			
Rank	Animal	# Responses	%
1	Lion	25	100%
2	Elephant	22	88%
3	Rhino	20	80%
4	Cheetah	11	44%
5	Leopard	10	40%
6	Giraffe	10	40%
7	Hippo	8	32%
8	Warthog	5	20%
9	Zebra	4	16%
10	Buffalo	2	8%
11	Birds	3	12%
12	Hyena	2	8%
13	Kudu	1	4%
14	Impala	1	4%
15	Aardvark	1	4%
Responses (25R)		125	500%

Like lodge 1, lion was the most sort after animal to be viewed on safari with a 100% (25 respondents) response rate, elephant 88% (22 respondents), rhino 80% (20 respondents), cheetah 44% (11 respondents), leopard and giraffe received an equal response rate of 40% (10 respondents), with hippo being popular choice at 32% (8 respondents).

Table 5.3: Lodge 3 Summary of responses of respondent's top five fauna.

Lodge 3:Top 5 fauna			
Rank	Animal	# Responses	%
1	Lion	25	100%
2	Rhino	24	96%
3	Elephant	23	92%
4	Leopard	14	56%
5	Giraffe	12	48%
6	Zebra	7	28%
7	Hippo	6	24%
8	Warthog	4	16%
9	Birds	3	12%
10	Buffalo	3	12%
11	Caracal	1	4%
12	Ostrich	1	4%
13	Jackal	1	4%
14	Aardvark	1	4%
Responses (25R)		125	500%

Lion once again received an 100% (25 respondents) response rate, where rhino 96% (24 respondents), elephant 92% (23 respondents), leopard 56% (14 respondents) and the giraffe rounding off the top 5 most important animals at 48% with 12 responses.

The results across the three reserves confirm that respondents primarily appreciate only a small portion of vertebrate diversity and tend to prefer as indicated the charismatic 'Big Five', namely the elephant, rhino, lion, leopard and buffalo (Kerley et al., 2003). As a result, these species are used as a major attraction/ draw card by the tourism market (Goodwin & Leader-Williams, 2000), Buffalo was not highly sort after by the respondents, with many of them saying it would be nice to tick them off the list, but not the end of the world if they don't get an opportunity to view the animals, with respondents preferring to view cheetah and giraffe during their stay.

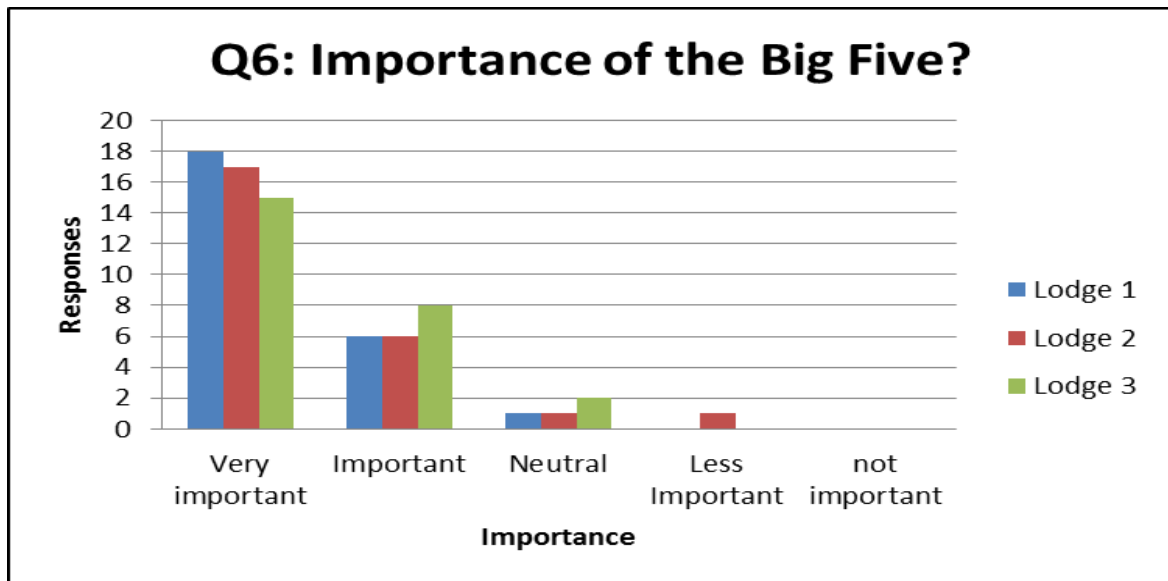
In the 2011 study conducted by Langholz & Kerley (2011:5), results indicated that the elephant was the most frequently mentioned, with lion and rhino being the next frequently listed. Results from this survey, indicate that lion is the most frequently listed by respondents as being the most sort after when choosing their destination, with rhino and then elephant making up the next most frequently responses , with cheetah, leopard and giraffe making up the next most frequented responses. All in all across the spectrum the same animals are consistently being mentioned within respondent's top five (5) "must see" fauna during their stay, and with game viewing/ wildlife and or viewing the 'Big Five' (see question 3) having been seen as the most important attraction represented by respondents when choosing the reserve, it is very important from a marketability (attractiveness) perspective that reserves are able to offer the opportunity to view these charismatic species, in order to ensure guests are attracted to their reserves in the foreseeable future.

1.5.2.6 Question 6: How Important is The "Big Five" with regard to your decision to visit this reserve?

Following on from the previous question asking respondents to name their 5 most important animals to view, this question focuses on using a Likert scale ranking of importance with regard to viewing the 'Big Five'. Results are outlined in Table 6 and Graph 6.

Table 6: Summary of the combined lodge respondent responses to the importance of the 'Big Five'.

Q6: Importance of "Big Five"						
	Importance	Lodge 1	Lodge 2	Lodge 3	# Responses	%
1	Very important	18	17	15	50	67%
2	Important	6	6	8	20	27%
3	Neutral	1	1	2	4	5%
4	Less Important	0	1	0	1	1%
5	not important	0	0	0	0	0%
Total Responses		25	25	25	75	100%



Graph 6: Combined responses of Lodge respondents to the “importance” of the ‘Big Five’.

Results are overwhelming from all three lodges responding in favour of the ‘Big Five’ being “very important” at 67% (50 respondents) and “important” 27% (20 respondents) when making the decision to choose the reserve they were staying at. Lodge 1 responses were 68% (17 respondents) and 24% (6 respondents) of respondents indicating that viewing the ‘Big Five’ is “very important” and “important” respectively with an overall combined importance of 92% (23 respondents), with only 8% (2 respondents) two respondents indicating that the ‘Big Five’ were either “neutral” (1 respondent) at 4% and “less important” (1 respondent) to making their decision to choose this lodge. The respondents that indicated “neutral” and the “less important” responses had indicated in their interviews that they were frequent safari travellers, and that they had seen the ‘Big Five’ before and had come to the lodge to enjoy the bush. They indicated that if they would see the ‘Big Five’, that it would be great, but it was not crucial in determining their decision to stay at the reserve.

Lodge 2, results indicated an overwhelming importance of 96% (24 respondents) combined response percentage with viewing the ‘Big Five’ being “very important”, 72% (18 respondents) and “important” at 24% (6 respondents) with regard to their decision to choose this reserve, with only 4% (1 respondent) indicating a “neutral” response to making their decision, but like with Lodge 1, this respondent had been on safari before.

Lodge 3 responses like Lodge 1 and Lodge 2, indicated that the 'Big Five' were "very important" at 60% (15 respondents) and "important" with 32% (8 respondents), with only 8% (2 respondents) indicating a "neutral" response.

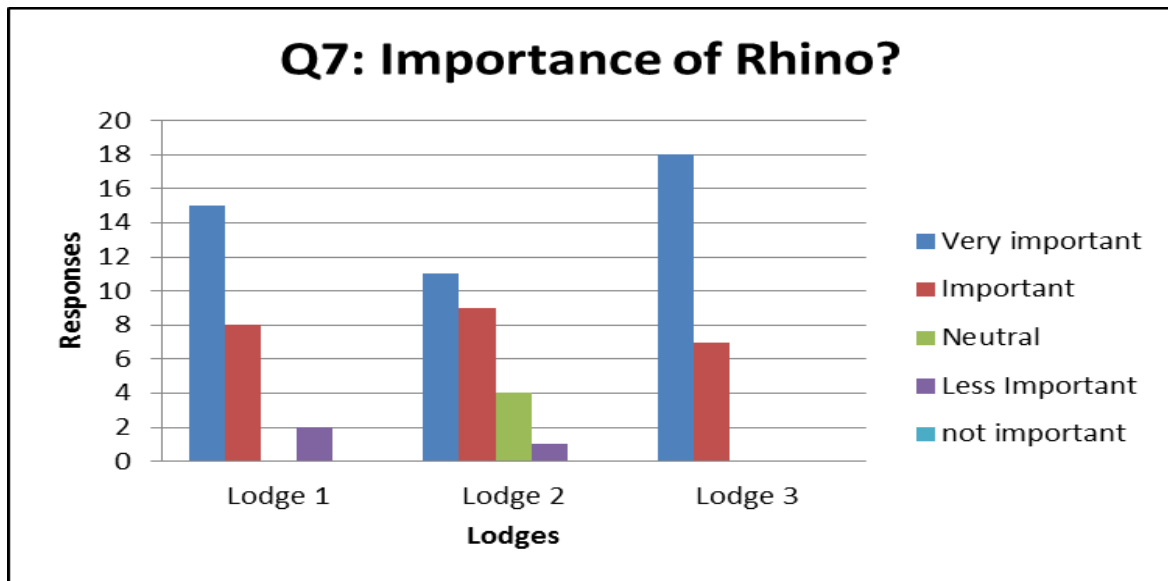
It is clear that from the survey conducted, that the 'Big Five' is "very important" and or "important" with regard to the decision of choosing the lodges they are currently staying at.

The following questions relate to the importance of each of the 'Big Five' animals are, with regard to the decision to visit this reserve. This will also provide crucial information relating to the discussion of the impact of poaching on the marketability of safari lodges in the Eastern Cape. Results will be outlined in tables and graphs pertaining to each question.

1.5.2.7 Question 7: How important is the opportunity to view rhino with regard to your decision to visit the reserve?

Table 7: Combined lodge results to respondents response to the importance of "rhino".

Q7: Importance of Rhino						
	Importance	Lodge 1	Lodge 2	Lodge 3	Total Responses	%
1	Very important	15	11	18	44	59%
2	Important	8	9	7	24	32%
3	Neutral	0	4	0	4	5%
4	Less Important	2	1	0	3	4%
5	not important	0	0	0	0	0%
Total Responses		25	25	25	75	100%



Graph 7: Summary of combined results on the importance of “rhino” for represented by respondents of each lodge.

Lodge 1’s response rate indicated that it was “very important” at 60% (15 respondents) and “important” with 32% (8 respondents) to have the opportunity to view rhino with regard to their decision in choosing this reserve. Two respondents (8%) indicated it was “less important”, and had indicated that they were aware of the poaching crisis, and that they were saddened when seeing rhino, and because of that, they indicated that it was “less important” to view the rhino.

Lodge 2’s respondents said it was “very important” at 44% (11 respondents) and “important” with 36% (9 respondents) to have the opportunity to view rhino with regard to the decision to visit the reserve, with 4 respondents indicating a “neutral” response at 16% (3 respondents) and 4% (1 respondent) indicating a “less importance” on viewing rhino in their decision to view the reserve. These respondents had been on safari before and had indicated the importance of other animals, and that the rhino was not a deciding factor in their decision to visit the reserve.

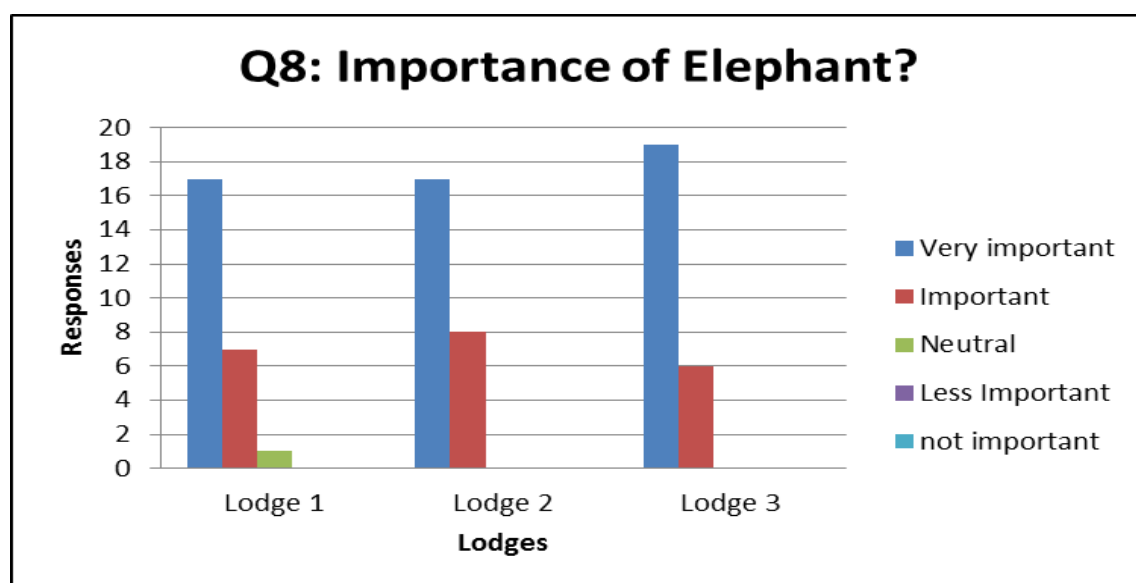
Lodge 3’s only had respondents indicating that the opportunity to view rhino was “very important” at 72% (18 respondents) and “important” at 28% (7 respondents) to their decision to visit the reserve. Many respondents indicated they were aware of the survival story of the poached rhino on the reserve and had specifically come to see that rhino, and was a contributing factor in the decision to visit the reserve.

The combined total of 91 % (68 respondents out of 75) of respondents indicated that rhino was either “very important” or “important” when deciding to visit a reserve.

1.5.2.8 Question 8: How Important is the opportunity to view “elephant” with regard to your decision to visit this reserve?

Table 8: Combined lodge results to respondents response to the importance of “elephant”.

Q8: Importance of Elephant						
	Importance	Lodge 1	Lodge 2	Lodge 3	# Responses	%
1	Very important	17	17	19	53	71%
2	Important	7	8	6	21	28%
3	Neutral	1	0	0	1	1%
4	Less Important	0	0	0	0	0%
5	Not important	0	0	0	0	0%
Total Responses		25	25	25	75	100%



Graph 8: Summary of combined results on the importance of “elephant” for represented by respondents of each lodge.

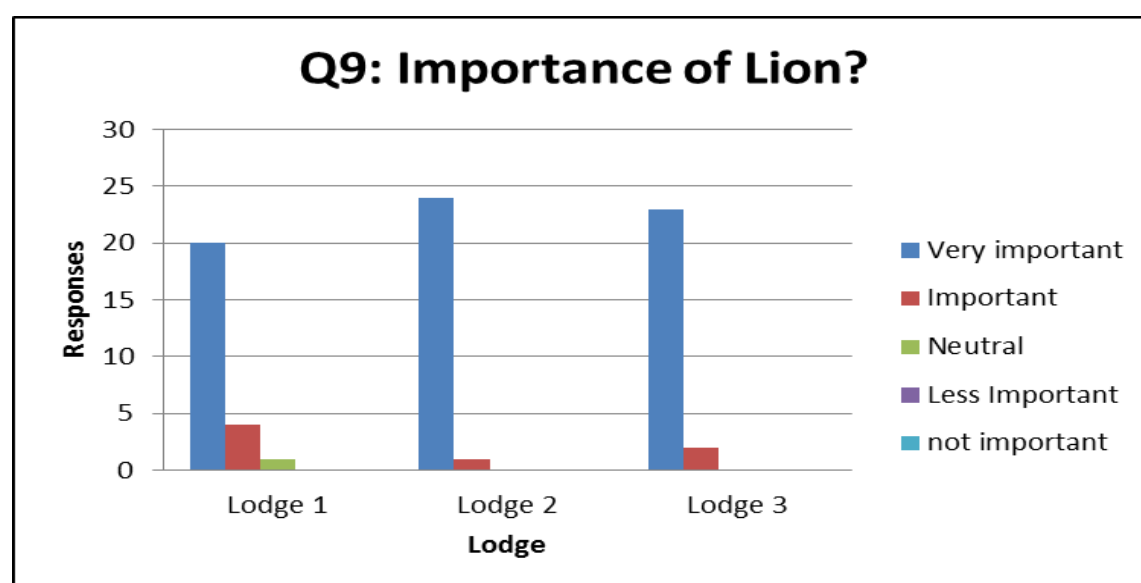
All three reserves had an overwhelming response to the question, indicating viewing elephant is very important and important to the decision to visit the reserve. With a combined percentage for Lodge 1 (96%), Lodge 2 and Lodge 3 both having a 100%

response rate in having the opportunity elephant as being either important or very important with regard to their decision to visit the reserve

1.5.2.9 Question 9: How important is the opportunity to view “lion” with regard to your decision to visit this reserve?

Table 9: Combined lodge results to respondents response to the importance of “lion”.

Q8: Importance of Lion						
	Importance	Lodge 1	Lodge 2	Lodge 3	Total Responses	%
1	Very important	20	24	23	67	89%
2	Important	4	1	2	7	9%
3	Neutral	1	0	0	1	1%
4	Less Important	0	0	0	0	0%
5	Not important	0	0	0	0	0%
Total Responses		25	25	25	75	100%



Graph 9: Summary of combined results on the importance of “lion” for represented by respondents of each lodge.

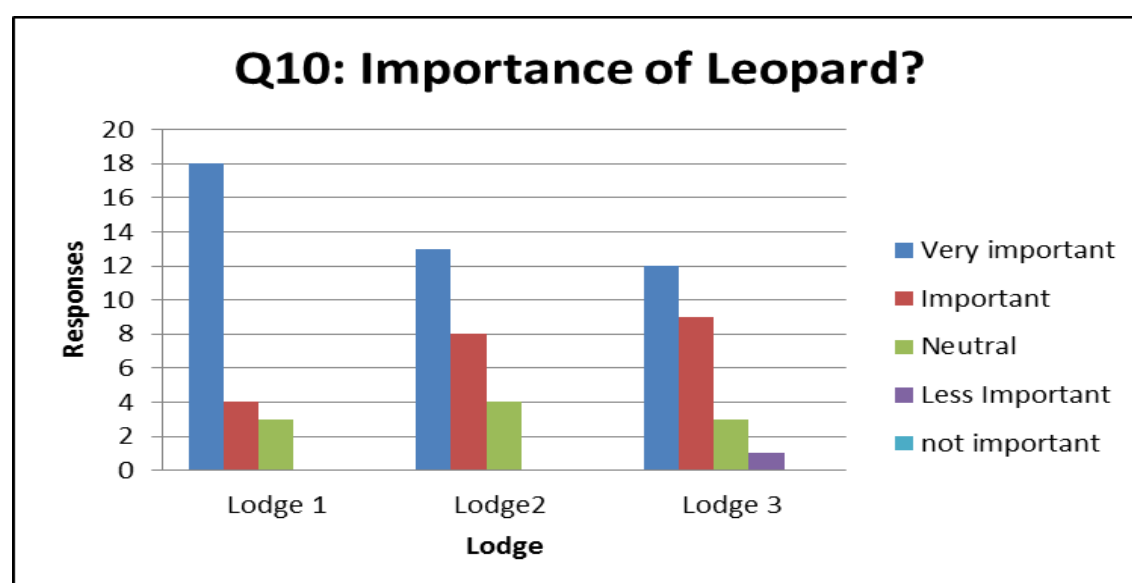
Similar to the importance of elephant, respondents indicated that having the opportunity to view lion during their stay as being important and very important with regard to their decision to visit the reserve. Lodge 1 (96%), Lodge 2 (100%) and Lodge 3 (100%) with only 1 respondent (4%) indicating a neutral response. This

respondent indicated that they would like to have the opportunity to view lion but it did not factor as an important factor when he had chosen the lodge.

1.5.3.10 Question 10: How Important is the opportunity to view “leopard” with regard to your decision to visit this reserve?

Table 10: Combined lodge results to respondents response to the importance of “leopard”.

Q10: Importance of Leopard						
	Importance	Lodge 1	Lodge2	Lodge 3	# Responses	%
1	Very important	18	13	12	43	57%
2	Important	4	8	9	21	28%
3	Neutral	3	4	3	10	13%
4	Less Important	0	0	1	1	1%
5	not important	0	0	0	0	0%
Total Responses		25	25	25	75	100%



Graph 10: Summary of combined results on the importance of “leopard” for represented by respondents of each lodge.

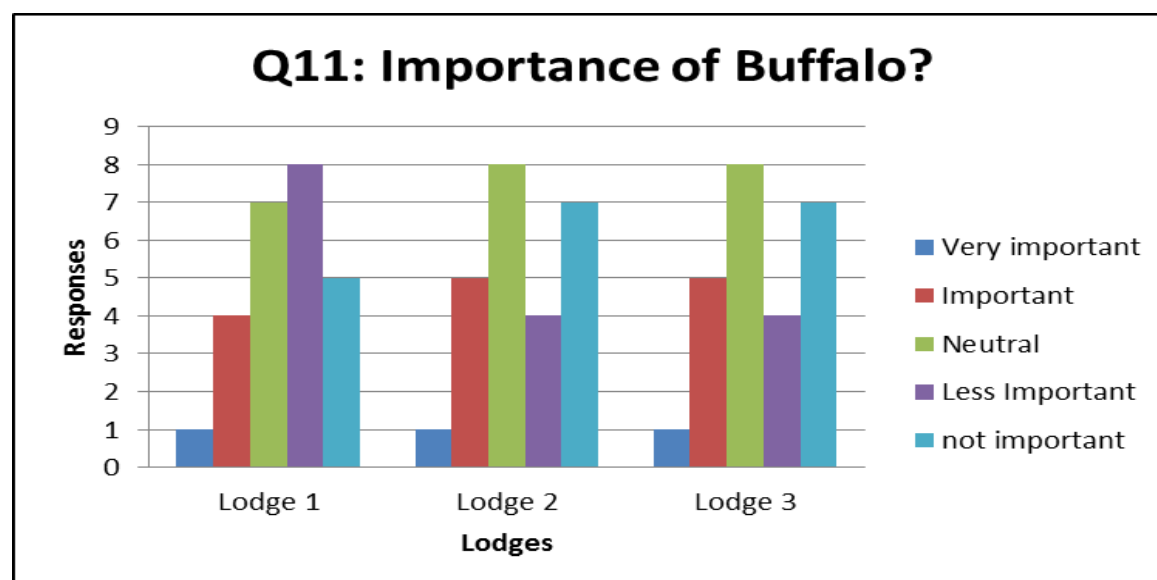
Results from respondents across the three lodges indicated that having the opportunity to view leopard was important and very important to their decision to choose the reserve. Lodge 1 (88%), Lodge 2 (84%) and Lodge 3 (84%) with the

remaining respondents either indicating neutral or less important. These respondents said they had understood that viewing leopard was very difficult, based on its illusive nature and that they would be lucky to view the animal, and therefore did not place an emphasis on the importance of the leopard to their decision to stay at the reserves.

1.5.2.11 Question 11: How important is the opportunity to view “buffalo” with regard to your decision to visit this reserve?

Table 11: Combined lodge results to respondents response to the importance of “buffalo”.

Q11: Importance of Buffalo						
	Importance	Lodge 1	Lodge 2	Lodge 3	Total Responses	%
1	Very important	1	1	1	3	4%
2	Important	4	5	5	14	19%
3	Neutral	7	8	8	23	31%
4	Less Important	8	4	4	16	21%
5	Not important	5	7	7	19	25%
Total Responses		25	25	25	75	100%



Graph 11: Summary of combined results on the importance of “buffalo” for represented by respondents of each lodge.

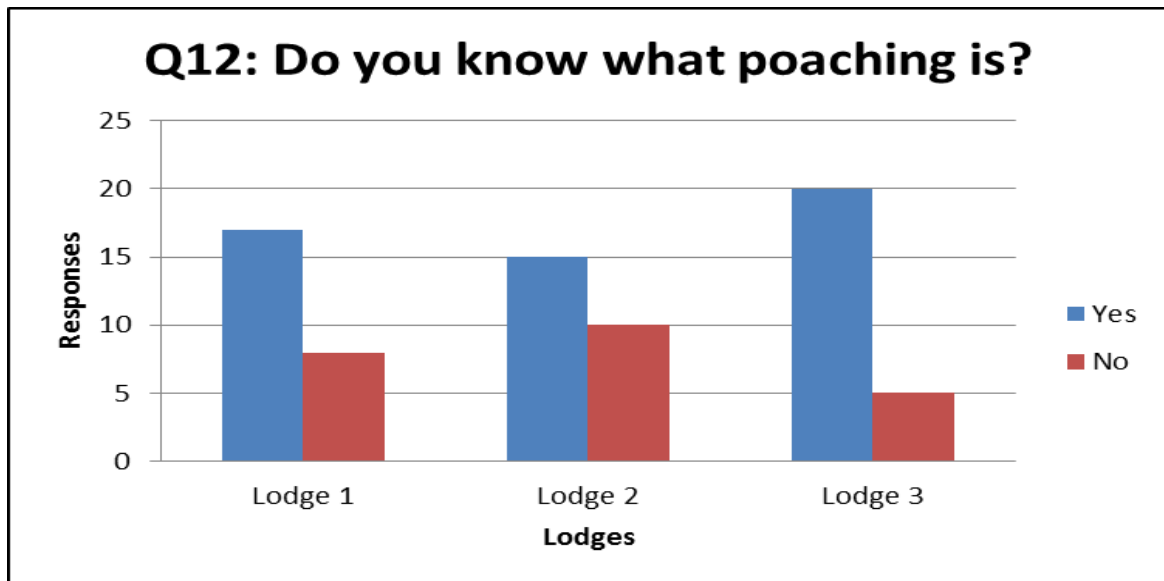
The buffalo was the least important member of the Big Five with regard to respondents to the importance of the animal to the decision made to visit the reserve. Lodge 1 (20%), Lodge 2 (24%) and Lodge 3 (24%) combined important and very important responses. The remainder of respondents either indicating a neutral, less important or not important response to the importance of having the opportunity to view buffalo with regard to their decision to visit the reserve. Many respondents indicated their desire to tick off the Big Five checklist, but often laughed saying that the buffalo was just another big cow to them.

Question 12, 13, and 14 all relate to the **concept of poaching**. Questions are asked around respondents understanding of the what poaching is, their awareness of what is happening in Africa with regard to poaching and the proverbial “what if” question, which assisted in determining the impact poaching and how likely would it affect the respondents decision to choose the reserve they are staying at if they could no longer provide the opportunity to view the desired attractions.

1.5.2.12 Question 12: Do you know what Poaching is?

Table 12: Lodge combined results to respondent’s responses to whether they knew what poaching was.

Q12: Do you know what poaching is?					
Answer	Lodge 1	Lodge 2	Lodge 3	Responses	%
Yes	17	15	20	52	69%
No	8	10	5	23	31%
Total	25	25	25	75	100%



Graph 12: Comparison of lodge respondent responses to whether they knew what poaching was.

Lodge 1's respondents when asked if they knew what poaching was, 68% (17) respondents indicated they knew what poaching was, with 32% (8 respondents) indicating that they didn't know what the word meant. Many respondents responded to the question by saying "is that hunting for food", with ideas of people hunting animals illegally for food. Where others knew what poaching was from the news and social media platforms.

Similar to Lodge 1, Lodge 2 had 60% (15) of respondents indicated "yes" that they knew what poaching was and 40% (10 respondents) responded with "no" they did not know what it meant.

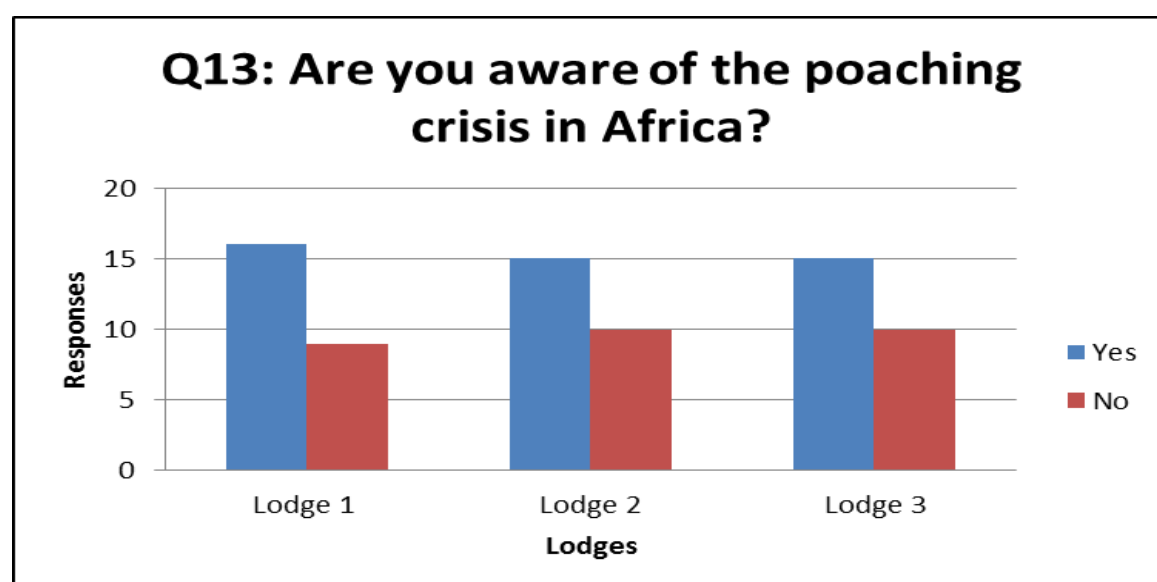
Lodge 3's results indicate that majority of the respondents interviewed at 80% (20 respondents) do know what poaching is, with 20% (5 respondents) indicating that they did not know what poaching was. Many of the respondents, who responded with a "yes" to the question, indicated that they had become aware of poaching through television and social media platforms, indicating that a main reason for coming to this reserve was to view and show support to the rhino that survived a poaching attempt.

Combined 69% of respondents indicated that they knew what poaching was.

1.5.2.13 Question 13: Are you aware of the poaching crisis currently going on in Africa?

Table 13: Combined lodge results of respondents responses to being aware of the poaching crisis in Africa.

Q13: Are you aware of the poaching crisis in Africa?					
Answer	Lodge 1	Lodge 2	Lodge 3	Total Responses	%
Yes	16	15	15	46	61%
No	9	10	10	29	39%
Total	25	25	25	75	100%



Graph 13: Comparison of lodge respondent responses to being aware of the poaching crisis in Africa.

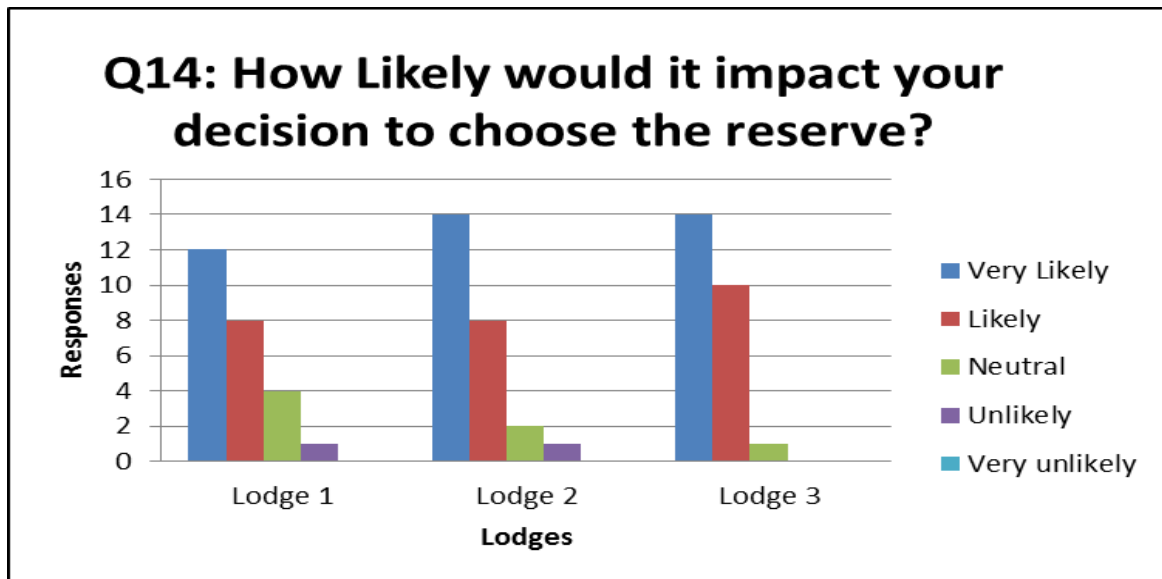
Overall responses of 61% (46 respondents) across the three lodges indicated an average response of “yes” that they were aware of the poaching crisis in Africa (Lodge 1 at 64% with 15 respondents, Lodge 2 and 3 at 60% with 15 respondents each) Where in the previous question (Question 12), 69% (52 respondents) indicated that they knew what poaching was, but did not know the extent of poaching in Africa (see question 12 and findings). With many people being shocked when informed that South Africa lost 1004 rhino in 2013, and Africa on average loses 35 000 elephant on an annual basis (DEA,2014). Those respondents indicating they were aware said they had stayed informed by the numerous media platforms available to them.

1.5.2.14 Question 14: If the unthinkable happened due to poaching and this lodge should no longer be able to offer the opportunity to view for example: “rhinos”, “lions” or “elephants”. “How likely” would this affect your decision to choose this lodge over another lodge that could?

This question focused on the proverbial “what if” question relating to respondents decision making to why they chose the lodge and how likely it would affect their decision to stay at the lodge, ‘If’ they would be unable to view the very attractions that attracted them to the lodges due to poaching. This was to determine the means of how important the attraction was to the lodge with determining the impact on marketability.

Table 14: Combined Lodge respondent responses to “how likely” would the absence of key species such as “lion”, “elephant” and “rhino” affect their decision to choose the reserve they stayed at over another reserve that could.

Q14: How likely would it impact your decision to choose the reserve/lodge?						
	Answer	Lodge 1	Lodge 2	Lodge 3	Total Responses	%
1	Very Likely	12	14	14	40	53%
2	Likely	8	8	10	26	35%
3	Neutral	4	2	1	7	9%
4	Unlikely	1	1	0	2	3%
5	Very unlikely	0	0	0	0	0%
Total Responses		25	25	25	75	100%



Graph 14: Lodge comparison of respondent results to “how likely” the absence of iconic species such as “lion”, “elephant” and “rhino” would affect their decision to stay at the reserve they were staying at over another that could.

This question was the proverbial “what if” question to respondents. Respondents from each lodge were asked at the end of the survey, after indicating their main attraction to the reserve, their 5 most important animals to view during their stay, the importance of the ‘Big Five’ and their individual importance to the decision to visit the reserve. Information pertaining to the current poaching crisis was given to provide a perspective to the question. “If the unthinkable happened due to poaching and this reserve could no longer offer you the opportunity to view: ”rhino”, “lion” or “elephant” as examples. How likely would this impact your decision to choose this reserve over another reserve that could?” This would be used to help assess the impact on marketability of safari lodges in the Eastern Cape.

An overwhelming response from respondents from all three lodges indicated that it would “likely” or “very likely” affect their decision to choose the reserve with a combined “likeliness” of 80% (20 respondents for Lodge 1), 88% (22 respondents from Lodge 2) and 96% (24 respondents from Lodge 3) as the opportunity to view the Big Five was a major attraction, draw card for them in choosing the reserve. This was especially emphasised by respondents visiting Lodges 2 and 3, as they had chosen those reserves based on specific animal attractions (white lion and rhino respectively). The lodges that had respondents indicate a neutral response and

unlikely responses, indicated that although these animals were important to them, they had viewed them in the past and had visited the reserves to enjoy the scenery and landscape and was a means to get away from the hustle and bustle of city life.

These results are discussed further in the discussion, but it is clear that poaching could have a major impact on the marketability of safari lodges, based on the results given by respondents within in this survey. The loss of charismatic species such as the lion, elephant and rhino, which are under threat from poaching, would be seriously impact the marketability (attractiveness) of the reserves, if they were no longer able to provide the main draw cards as a means of attracting visitors to their reserves. The majority 88% (66 respondents of respondents would “very likely” or “likely” choose another reserve that still has these animals having a detriment effect on the marketability of the lodges that don’t.

1.6 Discussion

1.6.1 Guest Motivations for visiting three sample Lodges in the Eastern Cape.

All previous studies conducted by Sim-Castley et al., (2004), Langholz & Kerley (2006), Snowball et al., (2008) and Kerley et al., (2011) all were taken from a management’s perspective pertaining to what attracted guests to their particular reserves. This current research allows those previous studies’ results to be confirmed or verified by looking at the research from the guest point of view, with the added benefit of the information being able to assist reserves in improving their marketing strategies in attracting guests to their reserves by understanding what makes them marketable (attractive) from the very guests that have chosen to visit them.

Results (see question 3, 4, 5 and their findings) were consistent with all previous surveys conducted by Sim-Castley et al., (2004), Langholz & Kerley (2006), Snowball et al., (2008) and Kerley et al., (2011), in that “game viewing together with an authentic wildlife experience, with particular interest in the Big Five” remained the most important draw card in attracting guests to the reserves (see question 3, 4, 6 and their findings). Followed closely by “natural scenery and landscape”, “luxury accommodation and service”, “the proximity to the Garden Route” and the “malaria

free” element of the location. Although responses such as being child friendly, the presence of spa facilities, honeymoon packages and the opportunity to view specific animals such as cheetah, white lion and rhino were indicated as important, although part of wildlife and game viewing, but it is important to mention as guest specifically mention their attraction to the reserve based on the presence of those specific attraction (see question 3, 4, 5 and their findings)

Results of this research (see question 2) can be justified based on the fact that 71% of respondents in this survey were first-time safari travellers and came specifically to the lodges to view wildlife. Majority of these respondents (47%) indicated that they used travel agents and (19%) Trip Advisor as a means to inform their decision to choose the particular lodge. This is important to note as travel agents and Trip Advisor promote the main attractions as perceived by the market, with media and information posted throughout websites promoting the brand of the ‘Big Five’ (Saayman, 2013), when marketing a location to potential travellers and is often a prerequisite for travels when choosing the reserve and this can be confirmed by the results above (see questions 3, 4, 5 and their findings).

The attractiveness of a reserve, especially as indicated by the respondents is based on their ability to view wildlife; especially the iconic ‘Big Five’ and other large charismatic species (see questions 3, 4, 5 and their findings). Results confirmed that Kerley et al. (2003) assumption that tourists “do” only appreciated a small portion of the vertebrate biodiversity and tend to prefer the charismatic ‘Big Five’, namely the elephant, rhino, lion, leopard and buffalo (see question 3,4,5,6 and their findings). The guests indicated in this survey that the top five animals to view during their stay were ranked as: 1. lion; 2. rhino; 3. elephant; 4. cheetah; and 5. leopard. Previous studies conducted by Snowball et al. (2008) and Kerley et al. (2011), have placed the elephant as the most important fauna to view, and followed by lion and rhino. It can be argued that the increased awareness of poaching and the plight of the rhino in recent years being highlighted particularly by Julian Radermeyer’s book “Killing for Profit” published in 2012, has opened the public eye to the plight of the rhino and the gruesome trade of rhino horn.(Carrington, 2014). The steady increase in poaching since 2010 with a total of 333 rhino killed, 448 in 2011, 668 in 2012, 1004 in 2013 and already over 748 rhino as of August of 2014 (DEA, 2014). Boynton (2014:1) indicated in his report that he believed that mankind could lose our signature species

with in a generation or two if something is not done to curb the poaching crisis. This is a very realistic scenario and with increased media (television and social networks) around the world, it seems that the rhino has increased its importance to the attraction to the reserve as seen in the data collected by this research (see questions 3,5,6,7 14 and their findings), indicating the importance of the rhino to the tourists' motivation for visiting the specific reserves..

Based on the individual species importance (see questions 7,8,9,10,11 and their findings), a part from the buffalo (see question 11), an average of 90% of respondents indicated that the opportunity to view the individual species of the Big Five was important or very important with regard to their decision to visit the reserve. Like previous surveys conducted by Sim-Castley et al. (2004) , Langholz & Kerley (2006), Snowball et al. (2008) and Kerley et al. (2011), the buffalo (although part of the famous 'Big Five') was not rated very important with regard to the decision to choose the reserve (see question 11 and its findings).

1.6.2 Perception of poaching and the impact on the motivations for visiting the three lodges.

In the past surveys by Sim-Castley et al., (2004), Langholz & Kerley (2006), Snowball et al., (2008) reserves described poaching as a minor problem, where research by Kerley et al., (2011), the survey indicating that the perception of lodges had changed highlighting poaching as a major problem. This can be confirmed by the increase in rhino being poached since the previous survey conducted by Snowball et al in 2008; the poaching reaching an all-time high of 1004 "rhino" in 2013, with more than 748 rhinos as of August 2014 (DEA,2014).. Poaching has become a global issue (Carrington, 2014), and lodges and ecotourism destinations that focus their main operations on wildlife tourism, need to understand the potential impact that poaching can have on their ability to attract guests to their lodges. Examples of the impact of poaching can be seen in the literature review (see Section 1.5 and 2) by Adhikari et al. (2005) and Wilson and Tisdell (1999). Adhikari et al. (2005) conducted a stakeholder perspective survey, looking at the economic incentives and poaching of the one-horned rhinoceros in Nepal and its effects on

number of visitors visiting the Royal Chitwan National Park. Similarly, the survey interview results from this current research indicated that the rhino was an important attraction to the reserve amongst its visitors, when asked if they would still choose this reserve if the rhino was not there, 40% (see questions 7 and 14) said they would not have chosen the reserve. Wilson and Tisdell (1999) looked at the non-consumptive tourism resource of sea turtles in Australia and its effect of poaching on visitor numbers. Their findings are similar to this current research's results (see question 14 and its findings), with regard to the potential impact poaching could have on the decisions of travellers in choosing the reserves surveyed.

It is important to note for discussion purposes that more than half (69%) of all respondents were aware of the concept of poaching and the on-going crisis represented by poaching in Africa as a whole (see questions 12, 13 and their findings). Respondents emphasised that they had become aware of poaching and the crisis in Africa, through different media channels, including blogs, social networks, television, newspaper articles and lodge website information pertaining to the awareness and plight of poaching. Although, when informed during the interviews of the extent of poaching namely of the rhino, elephant and lion as examples given, many respondents were shocked to hear of the actual numbers poached per year. These reactions were noted, although not originally apart of this research with regards to its goals, but it was important to note as it directly relates to providing a backdrop to the final question of the survey interview (question 14).

When discussing poaching during the interview questions 12 and 13, respondents were then asked the proverbial 'what if' question: "What if the unthinkable happened due to poaching and this reserve could no longer offer you the opportunity to view, rhino, elephant or lion as examples. How likely would this affect your decision to choose this reserve over another that could?" The findings of this can be seen in the results section under question 13, 14 above and shows, that when asked the proverbial question, respondents indicated

With the perspective that when choosing the reserves, as predominately first time safari travellers at (71%, question 1), who were directed by trip advisor (19%, see question 1) and travel agents (47%, see question 1) promoting the Big Five brand. The most important attraction of the reserves was the ability to view wildlife (100%,

see Question 4 and findings), placing very important and important emphasis on 4 of the Big Five and cheetah. Emphasising that having the opportunity to view these iconic animals was very important with regard to their decision to visit the reserve (see question 3,4,5,6 and their findings).

When the 'what if' question is added, with the insatiable demand for rhino horn, ivory and lion bones by the east (Radermeyer, 2012), how long before the tipping point is reached, where deaths outnumber birth rates. Is the proverbial "what if" questioned, not far from reality in the not too distant future? With Boynton (2014:2) indicating mankind could lose its iconic species within a generation or two. These are questions that need to be asked by lodges and reserves alike, as they are the very motivators that are attracting guests to their reserves.; it is what makes them marketable, attractive in determining their marketability (see question 3, 4, and their findings).

If the reserves were to lose any of those iconic species demanded by guests (examples given lion, elephant and rhino), such as in the case of Adhikari et al. (2005) survey of hotelier and tourism operators in the Royal Chitwan National park, due to the decline of the one-horned rhinoceros in the park, it was having an direct effect on the number of visitors to the reserve. The opportunity to view the rhino directly related to the decision of visitors to visit the reserve.

Whether it is in 10 years or in 100 years' time, the effects would be the same. The proverbial "what if" question, is exactly that, a "what if", it hasn't happened but it can be determined that the loss would have an impact on lodges being able to attract visitors to their reserves, With overall responses from respondents (88%) in this survey, indicating that "if" the reserves could not offer the opportunity to view the iconic species, it would likely and very likely impact their decision to choose that reserve over a reserve that could.

This research is important for lodges and reserves, not only in South Africa, but for all lodges providing a wildlife experience, since with the increasing competition, lodges are put under pressure to attract and maintain bed-nights, in a market demanding the "Big Five" in Africa (Saayman, 2013 and Kerley et al. 2013), tigers and rhinos in Asia (Adhikari et al. 2005), turtles in Australia (Wilson and Tisdell, 1999). This understanding of the importance of wildlife to the overall motivation to

visiting the reserves is undeniable, and the loss of any of the iconic species would likely impact the marketability of reserves dramatically. All is not lost, reserves that have suffered the loss of iconic species, like the Mejeete reserve in Malawi, who in the 70's was a thriving tourist destination offering the opportunity to view the Big Five, but with the introduction of poaching, the reserve lost its iconic species to poaching all together , with the last elephant being killed in 1992, causing tourism to all but dry up, but with the reintroduction of rhino, elephant and lion back into the reserve, it is once again a thriving tourist destination (Caitlin, 2014:48).

1.7 Recommendations

From this research and by using information gathered in previous studies and literature with regard to guest motivation and the importance of attractions , attributes perceived within the respondent's decision to choose a reserve (see question 3, 4 and their findings) , it allows an overall perspective of marketability and what makes a reserve marketable. The following recommendations have been made based on the research above to aid lodges in improving their marketing to ensure that their attractions, attributes are known to potential visitors and to ensure they remain marketable in a competitive industry.

All three lodges have established marketing strategies already focused on attracting the first time safari travellers as their primary clientele with results of Lodge 1 (56%), Lodge 2 (80%) and Lodge 3 (76%) all being first time safari travellers.

The lodges have utilised various forms of media, for example: (websites, trip advisor, and social media) to advertise their products, attractions and facilities to attract potential visitors (see question 1 and findings). It is recommended based on survey responses (see questions 3,4,5,6 and findings) that all three lodges should increase their marketing of their Big Five attractions and other unique reserve specific attractions such as cheetah (lodge 1 and 2), white lion (lodge 2) and rhino (all three lodges) in order to remain marketable.

Lodges in more established regions of Mpumalanga and Limpopo focus primarily on attracting first time safari travellers (DEA, 2014), but do so promoting statistically how many times they view lion, leopard or rhino a year, indicating to potential guests that if they decide to visit their reserve they would be guaranteed sightings of the desired Big Five (DEA, 2014) (see question 6, the importance of the Big Five). One

such example illustrated by David Ryan (the founder of Rhino Africa, an inbound travel company), is the world renowned Mala Mala Game Reserve located in the Sabi Sands Reserve who has become very successful in attracting guest by doing just that, focusing on their most desire attractions and pushing marketing and media of it, making them more marketable than reserves that don't (Ryan, 2014). This may be a sore point for some lodges as many lodges want to exhibit that they are more than just a Big Five experience, but based on the results from this current research (see question 5/6 and findings), reserves need to be able to provide the Big Five. And to facilitate safari lodges' improved marketability, the marketing strategies of these types of reserves in the Eastern Cape could benefit from adopting this approach used by successful reserves in the north of South Africa.

1.8 Conclusion

The objective of the research was to determine the marketability of three safari lodges in the Eastern Cape and to investigate the impact of poaching on that marketability.

The research focused on obtaining data from a guest's perspective from guests that had already chosen to stay at the reserves. The data gathered from the survey interviews was used to too determine guest motivations and their perception of poaching in determining the lodges marketability and impact that it would have on that marketability.

Data gathered by the survey interviews indicated that 71% of respondents were first time safari travellers, who had utilised travel agents (47%) and Trip Advisor (19%) to aid in their decision to choose the reserves. Guests were asked to list what had attracted them most to the reserve they had chosen. Results were consistent with previous surveys conducted by Sim-Castley et al., (2004) , Langholz & Kerley (2006), Snowball et al., (2008) and Kerley et al., (2011) with Wildlife and the opportunity to view the big five remaining the most important attraction to the reserve with 100% of respondents indicating its importance to their decision (see questions 3,4,5,6 and findings). Followed by the availability of natural scenery and landscape, the lodge's proximity to the Garden Route, luxury accommodation and service and that the lodge was located in a malaria-free area these were seen as the top 5 most important attractions. Other attractions, such as the availability of kids' programs,

health spas, and honeymoon packages were other motivators given by respondents (see questions 3 and its findings). The 'Big Five' was highlighted as the major draw card for all respondents at 92% of all respondents either indicating that having the opportunity to view the 'Big Five' and its individual species as being either important or very important with regard to their decision to visit the reserve (see questions 6-10 and their findings).

Respondents from each reserve also indicated the importance of an individual species that had attracted them specifically to that reserve, Lodge 1, respondents indicated the opportunity to view cheetah was a very important attraction. Where at Lodge 2, respondents indicated that they had specifically chose the lodge based on its ability to offer the chance to view the endangered white lion in the wild and Lodge 3, respondents indicated their desire to visit the reserve to view a now famous poaching surviving rhino, and attributed this attraction to media informing them of the poaching crisis in Africa (see questions 3, 4 and their findings).

From results it can be determine that the main motivation for respondents in choosing their respective reserves was the ability to view the 'Big Five' and other iconic species. Other motivations recorded are important to note for lodges in aiding their marketing strategies towards attracting more guests, but the importance of wildlife as key draw cards cannot be underestimated in the overall marketability of the lodges. As with the proverbial "what if" question proposed to respondents. If the unthinkable happened due to poaching and the reserve was unable to offer you the opportunity to view: rhino, elephant or lion. How likely would it affect their decision to choose that lodge? With 96% of respondents either indicating likely or very likely, that it would affect their decision to visit that reserve.

It is determined from these results that based on responses represented in the survey by respondents, that poaching has the potential to impact the marketability (attractiveness) of the three sample lodges as it directly affects their decision to choose one reserve over another based on its attractiveness, which is its ability to provide the iconic species currently being poached. It is therefore important for lodges to protect and maintain their attractions (see question 3, 4) in order to remain marketable in the future.

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Section 2: Literature Review

2.1 Introduction

In order to research the impact of poaching on the marketability of safari lodges in the Eastern Cape, it is important to understand from the literature the concept of marketability and its relationship to the consumer decision making process, looking at primarily the purchase decision when determining the marketability of the three safari lodges being sampled. The review built a foundation for the research, providing an insight into the concept of marketability, and its ability to attract based on its attractiveness, desirability, characteristics and attributes from which motivates guests, customers alike in choosing a product or a destination. The review will then look at literature focusing on guest motivations for visiting safari lodge destinations giving an insight into previous literature providing a precedence to this research, while then focusing on the concept of poaching and literature surrounding the impact of poaching on the concept of marketability. This will pave the way to this research within a South African perspective, which is seen as a gap in the research.

2.2 Marketability

The concept of marketability for this thesis needs to be defined and conceptualized to provide a platform for the research been undertaken. The American Society of Appraisers Business Valuation Standards (2002) as cited in Emory Sr (2002:1) defines marketability as being highly valued by investors and the relative absence (lack) of marketability generally reduces an asset's fair market value. This definition interlinks with Menger's (1976:232, cited in Stenkula 2010:2) theory of marketability where he likens marketability to the liquidity of money, and being able to transfer a product into cash, indicating the attractiveness of a product to the consumer and its ability to be sold quickly providing revenue for the seller. Furthermore, Zaccai (1994:234) defines marketability as "where the physical, social and emotional needs of the consumer are solved when purchasing a desired product." Stenkula (2010:5) defines marketability as the "ease at which a good can be sold, indicating its

attractiveness to the buyer". Marketability is further defined in literature by Jones et al (2005:10) as "what appeals to customers when choosing a product." Dawson (2013:11) defines marketability of a product as its relative attractiveness and desirability to a buyer. Saayman (2013:79) defines marketability within the safari industry as providing "a product that is most desired by your clients."

Literature surrounding the use of marketability focusses on the appeal; desirability and attractiveness of individuals, products or places as a means to being marketable to the consumer and its ability to be bought or visited as means of competitiveness. All literature defining marketability relates directly to a consumer, a buyer and or with reference to travellers. Therefore making it important for the reader to understand briefly the consumer decision making process as it will give an insight into the motivations of guests in determining the marketability of the three safari lodges and the literature that will provide a frame work for this research.

2.3 Consumer Decision making process and its role in marketability

It is important to understand the notion of the consumer decision making process when determining the marketability of this research. Although this research focused on investigating guest motivations for visiting the three sample reserves, it was also be important to understand the consumer decision making process and ultimately the motivation behind the 'purchase' decision made when choosing a particular lodge. The consumer decision making process, according to Kotler (2002:153), is the combination of processes undertaken by consumers in regard to a potential market transaction before, during, and after the purchase of a product or service. Kotler (2002:155) further indicated that the decision making process is made up of five stages: the recognition of a problem or need; searching for information on the need; evaluation the alternatives; the purchase decision; and the post purchase decision. This definition and notion by Kotler interlinks with earlier literature by Crompton (1979, cited in Hsu et al., 2008:290, Devesa et al., 2009:547) who view the consumer decision making process within a travel destination context. Crompton indicated people are motivated to travel because they are "pushed" into traveling by internal reasons or factors, or because they are "pulled" by a destination's attributes. Following on from Crompton's theory (1979) on why travellers choose destinations ,

Devesa et al. (2009: 258) indicated that the “push factors” were more related to internal or emotional aspects, such as the desire for escape, rest and relaxation, adventure, or social interaction. “Pull factors” were linked to external, situational or cognitive aspects, of which, attributes of the chosen destination, leisure infrastructure and cultural or natural features are all attributed to attracting the traveller and ultimately in the choice to visit that destination. In research by Hsu et al., (2008:290) their article indicated Crompton’s “Push , Pull” as the method to understanding travel motivations , highlighting the push motivation as being useful in explaining the desire to travel while the pull motivations are useful in explaining the actual choice in destination.

As important the consumer decision making process is, this research focused on the purchase decision of the process, focusing on the pull motivation theory as a means to determining guest motivation / attraction to the three sample lodges being reviewed as a means to determining marketability and the potential impact that poaching would have on those lodges ability to attracting guests. Poaching and the impact of poaching will be reviewed later on in this literature review. To understand pull motivations and its relationship to the purchase decision, it is important to review examples of this in the literature to give the reader a clearer perspective to the research being undertaken in this thesis.

2.4 Marketability and pull motivations

The following literature highlights examples of marketability that focus on the consumer decision making process , primarily the purchase decision or choice decision , and the role played by pull motivations in the attractiveness of the product, individual and destination as a means to providing a framework to determining the marketability of the safari lodges being sampled.

Zamkova and Blaskova (2013:219) look at marketability of organic products in Greece as a means of enhancing the appeal of the products to increase their sales and attractiveness to the younger generation. Cracolici and Nijkamp (2008:337) indicate the marketability of different tourist destinations in Italy as key to the

destination being able to attract interest from travellers, they focused on a tourist destination as no longer being seen as a set of distinct natural, cultural , artistic or environmental resources, but as an overall appealing product available in a certain area, a complex and integrated portfolio of services offered by a destination that supplies a holiday experience which meets the needs of the tourist. They concluded that the success of the destination depended on their tourist competitiveness in terms of their attractiveness characteristics or attributes that motivated tourists to visit those particular destinations. Following on from this Kozak (2000:222) indicated that the appeal and attractiveness that makes a destination marketable is based on its unique characteristics and products it offers, prompting the buyer to choose that destination , and according to Gunn, 1997 as cited in (Hu & Wall 2008:617) it is the attraction of the destination that pulls visitors too it. Further research by Etudor-Eyo (2014:80) on marketability of universities in Nigeria focused on the appeal and desirability of its courses as means to attracting students. The main focus of the study was to investigate reasons why students chose the University of Uyo in Nigeria and the extent to which each reason determines the student's choice. Students chose Uyo based on the attractiveness of the institutions characteristics (low tuition, well-credentialed faculty, research orientation and financial Strength) which appeared as the important motivators in raising the institutional attractiveness and drawing students to choose the University. A similar study by Brown (2007:30), examined the factors that make a medical school attractive to potential students and found that categories of medical school attributes stood out as positive motivators of choice, those where academic factors (reputation), location factors (city preferences) and intangibles (gut feelings and recommendations). All literature above indicate that key characteristics, attributes or attraction are key to determining the decision to either, buy, visit or choose that particular product, institution or destination. Now by understanding this notion with relation to marketability based on attractiveness, it is important to review existing literature surrounding guest motivations to visit safari lodges, to provide a platform to this research.

2.5 Marketability motivations / push factors within a safari lodge context

This research was inspired by previous research commissioned by the Wilderness Foundation and INDALO, the Eastern Cape Private Nature Reserve Association. They commissioned four survey-based assessments of the socio-economic significance of ecotourism-based private game reserves in the Eastern Cape. The surveys were to investigate the social economic profiles of private game reserves in the Eastern Cape, circulating questionnaires to the private reserves. The questionnaire was divided into five sections dealing with: the establishment of the reserve, tourism related activities, employment, conservation issues and policy issues. This research focused its attention on the tourism related activities as an insight into guest motivations. These surveys were conducted in 2004 (Sims-Castley et al. 2004), 2006 (Langholz et al. 2006), 2008 (Snowball et al. 2008) and 2011 (Kerley et al. 2011) and was used as a framework to this research, providing an insight into guest motivations based on what attracted them to the reserves.

As part of the investigation conducted within these surveys, respondents were asked why they had been attracted to the reserves they had visited. The results from all four surveys indicated that viewing the 'Big Five' and providing "an authentic wildlife experience" remained the most important attractions for visitors to the reserves while the availability of natural scenery and landscape, high-end accommodation, excellent service and fine dining were also seen as attractive attributes of the lodges (Kerley et al. 2011:2).

In the Sims-Castley et al. (2004) survey, when respondents were asked what attracted them to the reserve, they unanimously agreed on three factors, (1) the game, (2) the scenery and landscape and (3) the high quality accommodation and service. Other factors presented by respondents were for example, the proximity of the reserve to an airport; the reserves malaria free location; neighbouring communities and safe hiking were mentioned. The responses clearly indicated that the essential resource that attracted them to the reserves from which the industry depends on is the wildlife they support and the environment (Natural and Built) in which they can enjoy a unique African Experience.

In Langholz and Kerley's (2006) follow up survey, results were fairly consistent with the 2004 study with respondents confirming that wildlife was the single most important attraction. Nine out of Ten respondents listed "big game", "biodiversity" or some other wildlife descriptor as a major draw card. Also being consistent with the 2004 study was the second most important feature was that of the landscape, and six respondents commented on landscape attributes such as "pristine nature", "scenic beauty," and "beautiful unspoiled wilderness", as well as lack of noise and visual pollution. Rounding off the list of most frequently mentioned attractions were the "proximity to Port Elizabeth and the Garden Route" and "high quality accommodation and service."

In the final two studies conducted by Snowball et al. (2008) and Kerley et al. (2011) results were consistent with previous studies conducted in 2004 and 2006, with "game viewing together with an authentic wildlife experience, particularly the Big Five", was regarded as the most important draw cards in attracting guests to the reserves. As noted in the previous studies, guests only appreciate a small portion of vertebrate biodiversity and tend to prefer the charismatic 'Big Five' (Kerley et al. 2003). When respondents were asked to list the most important fauna to see, nine of the ten respondents, mentioned Lion, rhino and elephant, where two mentioned leopard.

With results from all surveys being very consistent, Kerley et al. (2011:9) indicated that "it sends a very clear message to current and future Private game Reserve owners: "that the most important asset is wildlife. But this wildlife must occur in as natural a setting as possible and in conjunction with a high quality tourist accommodation and service."

This research followed on from the above surveys, investigating the current, main attractions represented by three safari lodges in the Eastern Cape to determine each lodge's marketability. Utilising this information the research then investigated the potential impact of poaching on the marketability of the three lodges, based on the impact on the desired attractions as determined by each lodges' visiting guests.

Previous research conducted by Bresler (2007), Bruyere et al. (2007) and Saayman (2013, 2014) was used to form a framework as a means to discussing and comparing the three reserves. The Bresler (2007) study investigated whether wildlife

viewing at private game reserves in South Africa, creates a memorable and differentiated experience as a motivation as to why guests are attracted to Safari lodges. The study was to establish the behaviour and experience of tourists while visiting privately owned game lodges in Mpumalanga and the Northern Province, with the aim to unveil the consumer behaviour of wildlife tourists and to delineate the component and levels of the game lodge product in order to ascertain what attracts visitors to the game lodges and what they find is most appealing. The core attraction according to Bresler's results was for tourists to experience something unusual, to have an intimate new emotional experience, and the fascination with seeing animals in a genuine wilderness, especially the 'Big Five'.

The 'Big Five' are the "holy grail" of the nature based tourism industry according to (Goodwin & Leader-Williams, 2000) and are seen as the most important flagship species for conservation (Williams, Burges & Rahbek, 2000), a term coined by big game hunters to refer to the five most dangerous species to hunt on foot in the African savannah (Mellon, 1975 as cited in Macmillan et al. 2012:1). In reality the Big Five consists of six species namely the Lion (*Panthera Leo*), Leopard (*Panthera Pardus*), Elephant (*Loxodonta Africana*), Buffalo (*Syncerus Caffer*), Black Rhino (*Diceros Bicornis*) and the White Rhino (*Ceratotherium Simum*) and are seen as key to the marketing strategies of private reserves in attracting guests (Williams et al. 2000 as cited in Macmillan et al., 2012:1). This interlinks with Saayman (2013, 2014), who's research looked into visitor motivation and the attractiveness of the "Big Five", and how important this attraction is in securing bed-nights. Saayman (2013) conducted a survey to investigate the importance of the 'Big Five' to overnight visitors to the Kruger national park. Saayman (2013) indicated in his research that the conservation authorities use the 'Big Five' as an attraction and is seen as a major draw card in attracting foreign tourists to the park, and indicated that when asked, tourists are quick to tell which of the five they had seen (2013:79). He also informed that the reserves used the 'Big Five' as a brand and that it remains one of the major draw cards and therefore a main motivation for visiting the reserve. Kerley et al. (2003:13, 2007:180) follows on from this research which looked at visitors only being concerned with large charismatic species when visiting reserves. Kerley et al. (2003) , indicated visitor perception of the 'Big Five' and the importance of viewing elephant to the satisfaction levels of visitors to the Addo National Park indicating that visitors

where only concerned with viewing charismatic mega fauna. Where Bruyere et al. (2007:1465) research looked at tourist motivation behind visiting three national parks in Kenya, indicating that the reason for tourist visitation to the reserves was to view wildlife and cultures and the entire satisfaction of the stay hinged on viewing the few charismatic species, from which allowed the reserves to develop tourist-orientated marketing strategies aimed at the 'Big Five' as a means to increase visitation.

The Big Five or charismatic species are seen as flagship species according to Walpole & Leader-Williams (2001:543) and are used by reserves, destinations and lodges as a means to increase their marketability through advertising, encouraging tourists with the opportunity to view these flagship species in their natural environment. They indicated whilst the market identifies with the high profile charismatic species, providing examples of tigers, dolphins, rhinos, elephants and gorillas, there are efforts to enhance the public profiles of other animals to be seen as flagship species, but indicated that reserves understood the underlying fact that "big, cute, and furry" sells and that every opportunity to use this notion to attract visitors should be used.

Lindsey et al. (2007) research into wildlife viewing preferences of visitors to protected areas in South Africa confirm previous literature, stating that viewing preferences were very narrow with the sole focus on the importance of the 'Big Five' to the success of the tourism operations. According to Goodwin & Leader-Williams (2000 as cited in Lindsey et al., 2007:21) the 'Big Five' are the most popular species amongst tourists and the most expensive to conserve, either because they cause damage to human livelihoods giving examples of elephants, leopards and lions, or are targets for poaching (rhino, elephant) and require expensive anti-poaching operations.

It is the latter aspect which was the focus of this research within a South African perspective and is seen as a gap in the literature is that of poaching and the impact it has on the marketability (attractiveness) of the safari lodges in the Eastern Cape. In order for the reader to fully comprehend the impact that poaching potentially has on the marketability (attractiveness) of the safari lodges sampled, a brief review of literature surrounding poaching and the impact poaching has had, providing a precedence to this research.

2.6 Poaching and its impact

In order for the reader to understand the intention of this research, a brief description of the definition of poaching is given and will also be given reference to the current poaching statistics which puts the poaching crisis into perspective and the potential impact it could have on the marketability of the three safari lodges sampled. Muth and Bowe (2008:11) define poaching as “any act that intentionally contravenes the laws and regulations established to protect wild, renewable resources, such as plants, mammals, birds, insects, reptiles, amphibians, fish, and shellfish. These behaviours most often are illegal harvesting activities, but they also may include the illegal sale, purchase, transport, possession, and use of wild resources or their parts that are protected by law.”

The issue lies in South Africa and Africa that the demand for rhino horn, lion bones and elephant ivory affects the very attractions that motivate guests to visit the reserves (Boynton, 2014:4). According to the Department of Environment Affairs (2014), TRAFFIC (2014) and Boynton (2014), there are now more than 30,000 African elephants a year being poached for their ivory and in South Africa, which has more than 85% of the continent's remaining rhino, they are losing a rhino every 8 hours to poachers. Lion populations are also threatened, with five lions a day being killed illegally. At this rate these signature species could no longer exist in the wild within a generation or two (Boynton, 2014:1).

According to the Department of Environmental Affairs (2014) report, the current rate of poaching has escalated with no real end in sight, a total of 333 rhino were killed in 2010, 448 in 2011, 668 in 2012, 1004 in 2013 and already over 748 rhino as of August of 2014. The African Parks Organization in their recent report published in June 2014, highlight the horror of poaching statistics, particularly of elephant and rhino, and its links to organised crime and the global war on terror. Their report focused on the poaching crisis and how it had amplified, reinforcing that in 2013, over 1,000 rhinos were lost to poaching as were some 30,000 elephants and indicated the dire situation in Africa, with recent results of several credible studies indicating that there are no more than 400 lions, comprising just four viable

populations, remain in West Africa; Tanzania's famous reserves of Selous and Ruaha have lost 67% of their elephants in four years and central Africa has lost 64% of its forest elephants in ten years (Africa Parks , 2014)

With no end in sight, the question remains in this research, how long would it take to reach the tipping point, where rhino deaths out number rhino births, signalling the downward spiral to extinction (Radermeyer, 2012). The proverbial "what if" question was asked while investigating the potential impact of poaching on the marketability of safari lodges. What if rhino's, lions, elephant were to become extinct? , What if they became too expensive for private reserves to conserve? If reserves were not able to provide viewing opportunities of these charismatic species, would this affect the attractiveness of the reserves and the decision for visitors to visit those reserves who do not have these iconic species?

Research conducted by Adhikari et al. (2005) and Wilson and Tisdell (1999) was used to inform the approach taken by this research with regard to the impact of poaching.

Adhikari et al. (2005) conducted a stakeholder perspective survey, looking at the economic incentives and poaching of the one-horned rhinoceros in Nepal and its effects on number of visitors visiting the Royal Chitwan National Park. Survey results indicated that the rhino was an important attraction to the reserve amongst its visitors, when asked if they would still choose this reserve if the rhino was not there, 40% said they would not have chosen the reserve, where the remaining respondents either didn't answer the question or said they would of still visited the reserve based on is other attractions. When hotel and tourism operators were surveyed, they had said that tourist numbers had dropped due to poaching of the rhino, as rhino numbers had decreased dramatically making it harder for tourists to view them, which was having a subsequent effect on their occupancies and financial returns.

Wilson and Tisdell, (1999), had similar impacts on tourism, when looking at the non-consumptive tourism resource of sea turtles in Australia. They surveyed numerous hotels, tourism operators and conservation groups with regard to the importance of sea turtles to tourism and the effects of poaching on visitor numbers. The research looked at visitors being attracted to the coastal areas of Northern Australia to view the beaching, laying and hatching of sea turtles on an annual basis, but due to the

increase in poaching, illegal harvesting of eggs and other human impacts, sea turtle tourism is being impacted by fewer numbers of turtles appearing each year to lay their eggs. This has had according to their surveys of the tourism operators has had an effect on the number of visiting tourists and subsequently the financial returns, with many of the operators forced to stop operating.

Another example of specialised tourism being impacted by poaching can be viewed in Dan Stiles' (2013) article published in the September issue of the Africa Geographic magazine entitled, "Africa's lost Apes". Stiles (2013) describe the loss of nearly 4000 gorillas and chimpanzees a year to illegal poaching and trafficking to supply the demand from the East. Stiles (2013) indicated that due to the pressure on the wild populations, it has had an impact on tourism and those establishments that use Gorilla Viewing as a major tourism draw card. Poaching and trafficking has reduced viewing numbers, forcing remaining family groups of gorillas deeper into the forests, making it increasingly difficult for tourists to view these charismatic species. (2013:49).

An article written by Carrington (2014) highlighted the impact of poaching, hunting and human conflict role in impacting tourism. The article indicated that the major draw cards of the Namibian tourism industry were the desert-adapted lions, elephants and rhino. Indicating that only a handful of lucky people have had the opportunity to view Namibia's desert dwelling lions and that they are highly sort after by tourists. With recent increase in poaching, hunting and human conflict has seen the senseless killing of numerous dessert black rhino, dessert elephants and dessert lion. With most recently with the killing two of Namibia's most sorts after attractions, two desert male lions named Roth and the Terrance Male (Carrington,2014). According to Carrington (2014) the tourist industry in Namibia utilising the attraction of desert dwelling animals, especially those of the Big Five, are already feeling the effects of the losses and would likely continue to get worse if a solution is not done to curb the losses of the iconic species.

Although not every story has to be doom and gloom, in an article by Gemma Caitlin (2014:48) indicated the impacts of poaching of iconic species such as rhino, elephant and lion are to the marketability (attractiveness) of the Majete National park in Malawi. The national park in the early 80's was a thriving tourism destination,

offering the Big Five as a major attraction to the reserve, but with the introduction of poaching, the reserves iconic species, lion, elephant and rhino were all but lost, with the last elephant being killed in 1992. This had a dramatic effect, with the tourism all but stopping, with lodges and accommodation reduced to ruins in a few short years. Today it is a very different place, with the reintroduction of the iconic species and the government's involvement in curbing poaching and illegal activity, has brought this national reserve back to its former glory, and ear marking it as once again a major tourism destination being able to offer once again the iconic species it once lost. (Carrington, 2014:50).

This research could become important for South African reserves, as with the increasing competition, lodges are put under pressure to attract and maintain bed-nights, in a market demanding the "Big 5" as one of its main prerequisite attractions. The research could aid lodges in understanding the importance of their attractions as a means of marketing and could outline the potential impact poaching could have on attracting guests to their lodges.

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Section 3: Methodology

3.1 Introduction

This section details the research methodology and research method that was used in investigating the impact of poaching on the marketability of safari lodges in the Eastern Cape. This section outlines the goals of the research, the research paradigm, population and sample description, data collection and analysis and interpretation will be discussed. This section then discusses validity, reliability, the ethical considerations and limitations of the research being conducted.

3.2 The objective(s) of the research

The primary objective of this research is to determine the marketability of three safari lodges in the Eastern Cape and investigate the impact of poaching on that marketability.

The secondary objectives are:

- 1:** Investigate guest motivations for visiting three sample lodges in the Eastern Cape
- 2:** Determine visitor perception of poaching and whether it would impact their motivations for visiting these three lodges.
- 3:** Compare results between the three safari lodges surveyed and make recommendations for improving their marketing.

3.3 Methods, procedures and techniques

The paradigm adopted is that of post-positivism. According to (Babbie, 2008:34 as cited in Schmidt., 2011:79), research paradigms are “fundamental models or frames of reference that are used to organise out observations and reasoning”. Two principle components underlie the nature of paradigms, ontological and epistemological. Epistemology refers to the relationship between what is being observed and the observer, or as Babbie (2008:6) describes it, “the science of

knowing". Ontology describes the philosophical view of reality, described by (Gruber 1993:1 as cited by Schmidt, 2011:79) as "a systematic account of existence". It determines whether the observer believes that the universe exists independently of observation, or whether it can only be defined by what can be observed and the outlook of the observer. This study is located in the post-positivism paradigm within the broad field of qualitative research (Guba & Lincoln, 1994). The methodology used in this paradigm aims to enquire information in more natural settings, collecting more situational information, and determining the meanings and purposes that individuals ascribe to their actions (Koekemoer & Mostert, 2010:13).

This research methodology was primarily conducted using exploratory and qualitative research methods, with some quantitative data aiding qualitative discussions. Qualitative survey interviews were the method used to conduct this research at three private game reserves in the Eastern Cape. Quantitative data was also be gathered during the interview surveys, utilising Likert scale questions, prompting guests to choose their top attractions, from which basic descriptive statistics can be analysed to determine possible trends amongst respondents. According to Pinnsonneault and Kraemer (1993:7), interview surveys can be utilised when "the central questions of interest about the phenomena are "what is happening?", and "how and why is it happening?" It is well suited to answering questions about what, how much, how many and to a greater extent, questions about how and why. For the purpose of this research, interviewer surveys was the method used, where Babbie (2011:263) defines interviewer surveys as "a data collection encounter in which one person (an interviewer) asks questions of another (a respondent)". This had become important as considerations of guest literacy and language need to be taken into account. The data collection was be conducted in the first two weeks of August (during high season), where five days were be allocated to each lodge to collect data and conduct surveys.

3.4 Population and Sample size

Guests (from now on referred to as respondents) of the three sample safari lodges were the focus point of the research. This would give the research a unique perspective of respondents who had already chosen that particular reserve and to form the basis of the research with regard to attractiveness and their perception of poaching and the impact it would possibly had if they were to make their decision again. Permission from reserve management was given prior conducting the research. Interview questions were provided and authorised. Respondents were approached between activity times and were asked randomly “if they would be interested in participating in some research” and were therefore given the opportunity to voluntarily participate in the research.

The potential population between the three reserves if running at full occupancy during the survey period would be 1650. The population was calculated by the number of bed nights available between the three lodges at full capacity during the data collection period of 15 days (five days per lodge). Lodge 1 (20 bed nights), Lodge 2 (54 bed nights) and Lodge 3 (36 bed nights) giving a total of 110 bed nights between the three lodges per data capture day giving a potential population of 1650 over the collection period. The initial proposed number of respondents for this research was twenty five respondents per reserve (five surveys per day) making it a total of 75 respondents... Twenty five respondents per reserve were calculated as the optimum number of survey interviews the researcher could conduct during the respondent's free period (see research limitations) over the research period of 15 days, divided equally between the reserves to allow a comparison to be conducted. This number was proposed due to the limited timeframe available to interview respondents (over a two week period) and sensitivity towards the overall experience of respondents. This was achieved with seventy five short five minute qualitative survey interviews being conducted.

3.5 Data Collection

Data for this research was collected by means of structured, face to face qualitative Survey interviews. Interviews were conducted from the 1st to the 15th of August 2014.

Respondents were chosen randomly and were approached during free periods between daily reserve activities. The researcher introduced himself politely and asked respondents “would you mind participating in some research?” This was to allow all possible respondents to have the opportunity to decline or volunteer for the research. Interview survey questions were designed to ensure that the interview process took approximately between five to ten minutes in length, giving flexibility with regard to interest from the respondents.

3.6 Data analysis

For survey interviews conducted with guests, thematic analysis of the qualitative data was presented in narrative format, where cross case analysis was conducted deducing patterns appearing across the different survey respondents towards the attractiveness of the reserves and potential impact of poaching. Cross-comparative analysis was conducted between the three lodges to determine differences in data and potential impacts. Predominately qualitative data was used from the interviews with the use some quantitative frequency tables, having been used to analyse guest responses, allowing the researcher to deduce qualitative information to aid in the provision of recommendations.

3.7 Limitations

1. The time period from which to survey guests would be during rest periods (between activities), which would limit the amount of potential guests to be surveyed.
2. Language and literacy of respondents needs to be taken into account when considering responses and may limit results.

3.8 Validity and reliability

In order to ensure that the research reflect what is taking place (valid) and is credible (reliable), data was gathered randomly when conducting survey interviews with respondents. Hand-written notes were taken during interviews as well as brief recordings of the interviews utilising recording properties on the researcher's phone, this was to ensure reliability and accurate recording of all information.

3.9 Ethical Considerations

All reserves that offered to participate in this research were contacted beforehand and the purpose and scope of the research was detailed prior to permission being granted by the reserve managers for the research to be conducted.

It was agreed upon for the purposes of confidentiality, that all reserve names as well as respondent names to be kept anonymous. Respondents were approached randomly and were asked, if they would mind participating in the research, and were given the chance to decline or volunteer. The research interview questions do not ask for respondent's names, or any demographic information allowing for complete anonymity of respondents participating in the research.

Research questions (see Appendix 1) were also designed not to add unwanted pressure on the reserves participating in the research. This was seen as a potential concern for reserves allowing the research to be conducted. These was mitigated by explaining that all questions related to generic information pertaining to all reserves and are not reserve specific with regard to the questions relating to wildlife and expectations and would not put any pressure on reserves.

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Appendix 1: Questionnaire

To whom it may concern:

I am a student currently completing my MBA at the Rhodes Business School. I have been given permission by the university to conduct this interview. Your participation in this research is very much appreciated and I thank you.

Should you have any queries regarding the research and information pertaining to the permission of this interview survey?

Please don't hesitate to contact Ms Leticia Greyling at the Business School

(telephone number provided)

Kind regards

Rory James Loader

Student Number # g12l7340

Email address provided

+27 Telephone number provided

Interviewee #:

Reserve #:

Impact of poaching on the marketability of Safari Lodges in the Eastern Cape

Questions:

Q1: How did you find out about this Reserve?

A1: (Internet) (Magazine) (Agent) (Word of mouth) (television) or _____

Q2: Is this your first time on Safari? / How many times have you been on Safari?

A2:

Q3: What attracted you to this Reserve? What made you choose this reserve over other reserves in the Eastern Cape?

A3:
.....
.....

Following Questions depending on Answers:

Q4: Out of the list of motivations, what is the most important attraction of this reserve for you?

A4:

Example: Game viewing as part of main attraction.

Q5: What are your top 5 most important Fauna to see during your stay?

A5:
.....
.....
.....

Q6: How important is the “big 5 “with regard to your decision to visit this reserve?

Not important	Less important	neutral	important	Very important

The following questions are dependent on Answer:

Q7: How important is the opportunity to view Rhino with regard to your decision to visit this reserve?

Not important	Less important	neutral	important	Very important

Q8: How important is the opportunity to view Elephant with regard to your decision to visit this reserve?

Not important	Less important	neutral	important	Very important

Q9: How important is the opportunity to view Lion with regard to your decision to visit this reserve?

Not important	Less important	neutral	important	Very important

Q10: How important is the opportunity to view Leopard with regard to your decision to visit this reserve?

Not important	Less important	neutral	important	Very important

Q11: How important is the opportunity to view Buffalo with regard to your decision to visit this reserve?

Not important	Less important	neutral	important	Very important

Poaching Questions

Q12: Do you know what poaching is?

Q13: Are you aware of the poaching crisis currently going on in Africa?

Q14: If the unthinkable happened due to poaching and this reserve could no longer offer you the opportunity to view: Rhino, Lion or Elephant as examples. How likely would this affect your decision to choose this reserve over another reserve that could?

Very unlikely	Unlikely	neutral	Likely	Very likely

[illegible]