TRACKING TOURISM PERFORMANCE:

CREATING A BAROMETER FOR THE NAMIBIA TOURISM BOARD

Sponsoring Agency: Namibia Tourism Board

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Date: 02 May 2008

ABSTRACT

The fast changing tourism industry requires a tracking method to update information on a timely basis. Our project assisted the Namibia Tourism Board in monitoring the industry's performance in four sectors: accommodations, vehicle rental and car hire, tour & safari, and trophy hunting. Through interviews, surveys, and the creation of a database, we developed a barometer to measure the industry's performance every two months and suggested a communication strategy to present the information to relevant stakeholders.

Acknowledgements

AUTHORSHIP

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EXECUTIVE SUMMARY

International travel and tourism has grown exponentially in the past five decades. In 1950, the number of tourists world-wide was close to 25 million, reaching up to 800 million in 2005 (Egmond, 2007). As a result, exotic tourist destinations, such as southern Africa, have also experienced an increase in the number of international tourists. The tourism industry is a valuable asset to a nation's economy in generating revenue and increasing the Gross Domestic Product (GDP) (The Namibia Economist, 2008). Travel & Tourism-related (TT) organizations, such as the Namibia Tourism Board (NTB), are responsible for optimizing the economic potential and developing monitoring systems to assess the overall health of the tourism industry. Current methods of monitoring the performance of the tourism industry rely on statistical reports produced every six to twelve months; however, this valuable information needs to be updated frequently to capture the fluctuations in the industry. The purpose of our project was to alert stakeholders[1] of the short-term performance of the tourism industry within the four sectors of accommodations, vehicle rental and car hire, tour & safari, and trophy hunting within Namibia.

Through the direction of our sponsor, the NTB, our project's two main goals were to develop a prototype tourism barometer and a practical communication strategy to present the information to relevant stakeholders. Through assessing each of the four above mentioned sectors, the aim of the barometer includes comparing changes in market performance with the same period from the previous year, identifying factors that influence those changes, and establishing future business prospects. The aim of the communication strategy is to distribute the tourism barometer to

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[1] Stakeholders are people or organizations with invested interest in the performance of the tourism industry.

stakeholders on a bi-monthly basis. This would provide them with valuable, time-sensitive information about the tourism industry.

We reached our goals by completing six objectives: (1) developing a list of key indicators[2] for each sector, (2) identifying and categorizing stakeholders, (3) developing survey forms for each tourism sector based on the key indicators, (4) selecting a trial panel of businesses to provide data for the barometer, (5) creating a prototype database, and (6) creating a prototype tourism barometer. Prior to our arrival to Namibia, we created preliminary lists of indicators for each sector, created survey forms called Tourism Data Entry Forms (TDEFs), and categorized relevant stakeholders into groups.

After arriving to Namibia, we compiled a list of Namibian stakeholders and grouped them into four categories: Government & Ministries, Travel & Tourism-related Associations, Conservation & Environmental Organizations, and Financial Institutions. After compiling these categories, we conducted interviews with twelve selected stakeholders in addition to our liaison and relevant NTB staff. The purpose of these interviews was to gain feedback about the feasibility, content, and organizational structure of our preliminary lists of indicators and the proposed survey forms—the TDEFs. Based on their feedback, we made revisions to our preliminary lists of indicators, creating a final list to be used in forming questions for the TDEFs. We tested our survey with the stakeholders and incorporated their recommendations into our final TDEFs. The finalized TDEFs were formatted in a Microsoft Excel file with eleven check box and open-ended questions.

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[2] Indicators are quantitative and/or qualitative data used to assess the performance of the tourism industry.

After finalizing the TDEFs, we E-mailed them to 877 registered businesses in the four sectors, along with 12 businesses suggested by our liaison. We gave the businesses one week to complete the form and return it to our team. Within two weeks, a total of 71 businesses had responded, garnering the most responses from the trophy hunting operators and tour & safaris operators. From these responses, we selected a representative sample of seven businesses from each sector, called the trial panel. We developed a database in Microsoft Access 2007 to store and analyze the incoming data from the TDEFs, which will aid in creating graphs for the tourism barometer. For the purpose of our project, we created graphs in Microsoft Excel 2007 to capture the performance of tourism in Namibia. The prototype barometer, a six-page document, was created in Microsoft Publisher 2007. It was designed to contain both text and graphs, which are properly labeled for each sector. In addition, we developed a schedule with recommendation on how to distribute and collect the TDEFs, input data entry into the database, and release the publication of the barometer to relevant stakeholder groups. We also provided additional recommendations to the NTB for the future implementation of the tourism barometer on a larger scale.

CHAPTER 1: INTRODUCTION

1.1   INTRODUCTION

Although tourism, according to Ton Van Egmond (2007), has grown into one of the world's largest economic sectors, it is still an area that is not well researched or understood. Tourism is a valuable asset to a nation's economy in terms of generating revenue and increasing the Gross Domestic Product (GDP) (The Namibia Economist, 2008). This industry can be especially important in developing countries to help alleviate poverty by increasing foreign exchange reserves and generating income that would otherwise be difficult to obtain. The number of international tourist arrivals worldwide has increased substantially in the past five decades. In 1950, the number of tourists was close to 25 million, while in 2005 that number reached 800 million (Egmond, 2007). As these numbers continue to grow, more research must be completed and suitable systems are needed to measure both the success and challenges of the tourism sector, as well as help in the marketing of a country as a tourist destination.

More specifically for tracking tourism performance, the major problem for the Namibia Tourism Board (NTB)[3] is that the current system for collecting data to measure tourism trends is infrequently updated and of uncertain accuracy; most of the information is only available after six to twelve months. Without having up-to-date information every two months, it is extremely difficult for the NTB to accurately assess the performance of the tourism industry. Additionally, the NTB must decide which specific tourism businesses to track, what type of information is most useful to analyze, and how this information should be presented to stakeholders.

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[3] The NTB is a government sanctioned body tasked with improving tourism in Namibia (see Appendix A).

In order to understand tourism tracking more thoroughly, a tourism barometer has been found to be useful in presenting statistical data in a graphical and textual format. The barometer is used to monitor the industry's performance, such as the general market performance of tourism, specific business performance, past and present trends, and future prospects for the tourism industry. Currently, the NTB uses a levy system to track the accommodation sector every two months, but this is only one aspect of the entire industry. The NTB staff is also working on updating their Tourism Satellite Account (TSA), which measures the economic impact of tourism (WTTC, 2006a). The TSA was developed by the World Travel & Tourism Council (WTTC) in order to provide countries with more detailed economic information about GDP and employment rates relating to tourism. An example of how the United States of America measures the performance of the accommodation sector is by using occupancy percentages, average room rates, and revenue per available room (revPAR) (WTO, 2007).

Although the NTB currently has some monitoring systems in place, this fast changing industry requires a tracking method that will update information on a timely and frequent basis. Many gaps exist in tourism research because most studies have focused on tourist attractions and their affects on tourists as opposed to the industry itself (Fennell, 1999). Current tourism-related companies are not meeting their economic goals for two reasons: they are either doing poorly in attracting tourists to the area or the tourists do not contribute enough economically due to limited spending. By establishing a more timely method for tracking tourism performance, the NTB should be able to assess how each sector is performing. As a result, the NTB could advise how to better market Namibia as a tourist destination depending on the seasonality and specific markets trends.

The purpose of our project was to assist the NTB in developing a more responsive and timely tracking method for Namibia's tourism industry. This included tourism performance within four

sectors: accommodations, vehicle rental and car hire, tour & safari, and trophy hunting. These are prominent areas of tourism that are important to the growth and vitality of Namibia's economy. The specific goals of our project were to develop a barometer to measure the tourism performance of these selected business sectors and to suggest a communication strategy through the use of the barometer to keep the stakeholders in the tourism industry informed of their progress every two months.

In order to successfully reach our goals, we identified a list of key indicators, which includes a list of indicators relevant to all sectors and a list for sector-specific indicators. From this, we devised a Tourism Data Entry Form (TDEF) for each sector, distributed them to NTB registered businesses, identified a list of seven tourism businesses from each sector to be included on the panel, determined guidelines for the collection of information needed for a barometer through the use of a database, and provided recommendations on the format of the barometer. We also identified an effective way to communicate this information to the stakeholders. A database will be updated every two months so that the information relevant to the tourism industry will be available frequently, and this information will then be released on the barometer. Overall, we hope that Namibia will benefit economically from this system since stakeholders will be able to anticipate when the majority of visitors will arrive, where visitors will arrive from, and how well the tourism industry performs over a particular time period.

CHAPTER 2: BACKGROUND RESEARCH

2.1 INTRODUCTION

Many countries rely on carefully gathered statistical data, such as the Tourism Satellite Account (TSA), to provide essential information in regards to the success of the tourism industry. While this information can be reported in a variety of ways, some countries have developed a sophisticated reporting system, called a barometer, to provide both a quantitative and qualitative measurement of tourism performance. Broad statistics on tourism are useful to all countries; however, more refined data relating to accommodations; vehicle rental and car hire operators; tour & safari operators; and trophy hunting operators would provide Namibia with the knowledge of how to further enhance the appeal of these specific tourism areas. By providing Namibian tourism companies with more up-to-date information on a regular basis, they may significantly improve their own revenue streams and help the Namibian economy by making timely adjustments. In order to fully understand the importance of collecting statistical data on these important divisions within the tourism industry, this chapter explores the essential aspects of Namibian tourism in the context of world travel, as well as focuses on the methods of tourism information collection and management.

2.2 METHODS OF TOURISM TRACKING AND STATISTICAL ANALYSIS

From January to April of 2007, the number of tourist arrivals worldwide rose nearly 6% from the previous year, resulting in approximately 252 million people arriving in foreign destinations (WTO, 2007). With worldwide tourism steadily on the rise, countries rely on the use of various tracking and recording systems to provide important statistical data to reveal tourism trends and the impact of tourism on a country's economy. Considering the range of data involved in tracking tourism, several methods have proven to be unreliable and imprecise; however, many countries have

found the use of the TSA and the tourism barometer to be effective methods for collecting and reporting tourism data. For example, the Scottish Tourism Board and the World Travel & Tourism Council both use a barometer to track tourism trends. While these methods have their limitations, such systems can provide stakeholders with important information regarding the contribution of tourism to a nation's economy.

2.2.1 THE TOURISM SATELLITE ACCOUNT: NAMIBIA

The TSA is an annual publication produced by the World Tourism Organization (WTO), which has enabled 176 countries to track the impact of travel and tourism on their economies. While tracking tourism is statistically possible, its numerical representations are hidden in various sectors of a nation's economy such as agriculture, imports, accommodations, and transportation (Smeral, 2006). Experts developed the TSA in an effort to interpret massive amounts of financial data, which can be tracked over time and compared to other economic sectors. Putting the TSA into practice has helped to identify tourism activities as a significant contributor to a country's GDP.

THE SYSTEM OF NATIONAL ACCOUNTS: THE FOUNDATION OF THE TSA

The TSA is based off of the System of National Accounts (SNA), which was revised by the United Nations in 1993 to provide an internationally agreed standard of market data collection and management (UNSD, 2001). Using the SNA, countries can compile and analyze vast amounts of economic data. While the SNA is essential to fully evaluate a country's economy, the TSA only focuses on commodities and industries related to tourism, thus making it a "satellite" or auxiliary portion of the SNA. By evaluating a country's SNA, a government is able to draw conclusions and make political and economic decisions based on the results.

Through the methodology invoked by the World Tourism Organization (WTO) in its document entitled "Tourism Satellite Account: Recommended Methodological Framework" (TSA:RMF), there are five main components which should be included in a country's TSA, as a supplement to the SNA (CEC, 2001):

1. A collection of macroeconomic data that provides an overall quantitative contribution of tourism to the economy, as well as its impact on the country's GDP.
2. Measures the extent of tourism consumption of both local goods and imported products.
3. Provides information on the production of goods in the tourism industry and its relationship to other economic industries within the country.
4. Presents information on the requirements to produce accurate models of tourism within a given country.
5. Develops a relationship between monetary values (e.g., cost of accommodation) and non-monetary values (e.g., length of accommodation and methods of transportation).

By combining these five factors, the standard TSA is produced, which enables a monitoring agency, such as a government funded tourism board, to fully evaluate the impact of tourism within a country.

SUPPLY AND DEMAND

According to the World Travel & Tourism Council (WTTC) (2007a), the TSA is divided into sections based on supply and demand. The demand focuses on consumption, such as personal travel and tourism, business travel, government expenditures (individual and collective), visitor exports, capital investments, and exports for non-visitors. Conversely, the information for the supply side of the TSA is formed from the travel and tourism industry's portion of GDP, travel and tourism industry imports, the economy's overall GDP, and economic imports.

Following similar strategies described in the TSA:RMF, the WTTC was able to develop clear definitions and categories to group supply products against demand products. Table 1 displays the variables used to determine the tourism demand in a standard TSA.

Table 1: Tourism Demand Variables (WTTC, 2006a)

Tourism Demand
Personal Consumption
Durables
Non-Durables
Services
Business Travel
Corporate
Government
Visitor Exports
Services
Merchandise
Government Expenditures - Individual
Tourism Consumption (Visitor Demand)
Government Expenditures - Collective
Capital Investment (Formation)
Private Sector (incl. Personal)
Public Sector
Non-Visitor Exports (World Tourism)
Merchandise Trade
Total Tourism Demand

According to the TSA:RMF, personal consumption, as shown in Table 1, considers the expenditures of residents relating to lodging, transportation, and food. Meanwhile, the types of visitor exports refer to the expenditures of foreigners for lodging, transportation, and food. While these variables may vary from country to country, an example of such expenditures in Namibia would be a safari through the Caprivi Strip or lodging at a guesthouse in Otjiwarongo. Appendix C shows a demand flow chart and its corresponding monetary value taken from a 2006 Namibia TSA report.

Table 2 displays the supply side of the TSA, specifically focusing on goods produced within the tourism industry and tourism economy. In this case, the "tourism industry" refers to companies directly related to the production of tourism goods, while the "tourism economy" is a broader term used to describe many different aspects of tourism production. Appendix D shows a supply flow chart and its corresponding monetary value taken from a 2006 Namibia TSA report.

Table 2: Tourism Supply Variables (WTTC, 2006a)

Supply - Tourism Industry
Tourism Industry GDP (Direct GDP Derived From Tourism Consumption)
Direct and Indirect Tourism Industry GDP
Imports by Tourism Industries
Employment by Tourism Industries
Tourism Industry Imports
Tourism Industry Employment
Components of Tourism Industry GDP
Compensation, Operating Surplus, Depreciation, Subsidies, Indirect Taxes
Direct and Indirect Tourism Industry Measures
Supply - Tourism Economy
Tourism Economy GDP (Direct and Indirect GDP Derived From Total Tourism Demand)
Components of Tourism Economy GDP
Compensation, Operating Surplus, Depreciation, Subsidies, Indirect Taxes
Tourism Economy Imports
Tourism Economy Employment
Direct and Indirect Tourism Economy Measures
Total Tourism Supply

THE IMPLEMENTATION OF THE TSA IN NAMIBIA

According to the WTTC's report on implementing the Namibia TSA (2006a), a TSA revealed a 14.4% increase in tourism related activity in the country in 2004, resulting in an additional 69,000 seasonal and year-round jobs relating to the tourism industry. Due to the relatively small population of Namibia, approximately two million, residential tourism plays less of a role than foreign tourism when tracking statistics. It is therefore essential for Namibia to develop reliable data collection and presentation methods of foreign tourism to successfully track its tourism industry. By

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following the recommendations of the UN's TSA:RMF, the Namibian TSA remains one of the most important detailed sources of information.

In 2006, the WTTC (2006a) along with the Oxford Economic Forecasting Company (OEF) implemented the Namibian TSA through three main objectives: (1) computing demand through consumption, investment, and exports; (2) producing input-output tables to convert demand results into supply results through measuring employment compensation and depreciation; and (3) creating a forecasting procedure for tracking tourism performance.

PROBLEMS WITH THE TSA

Although the information provided by the TSA is useful and organized, there are still problems to overcome. For instance, there is no clear way of collecting exact data on tourism-related activities. Ideally, outputs of tourism-related industries would provide a clear measure of data. However, not all of the goods produced by a particular industry are directly related to tourism. While some of the goods may be purchased by companies in the tourism sector, other sectors, such as energy, transportation, retail, and government may use the goods as well (Planting, 1998). Consequently, a further break-down is needed to consider if a local person or a foreigner is buying specific tourism-related goods. Despite possible errors, the TSA uses tourism commodity ratios to evaluate this proportion of foreign or domestic purchases in the tourism sector.

The problem of defining terms must also be considered when analyzing and collecting data. According to the methodology implemented by the United Nations (CEC, 2001), the identification of tourism products is defined as either (1) tourism characteristic products, (2) tourism-connected products, or (3) tourism-specific products. Tourism characteristic products are defined as products that, without foreign visitors, would nearly cease to exist within a country. Meanwhile, tourism-connected products are items that may pertain to tourism specifically in a certain country, but not on

a worldwide basis. Finally, tourism-specific products are a combination of the previous two definitions. Overall, compiling an accurate TSA requires meticulous calculations and specific standards to follow. Due to this, the TSA of Namibia is updated infrequently, and therefore the implementation of a more timely tracking system is needed. Despite these shortcomings, the TSA still remains the most accepted way of calculating the economic contribution of tourism to a country.

2.2.2 CURRENT DATA COLLECTION IN NAMIBIA: THE LEVY SYSTEM AND IPPR

Presently, there are different forms of data collection in Namibia, for example, the levy system and the Institute of Public Policy Research (IPPR) surveys, which provide information about the markets and trends in the country. For example, the NTB uses a levy form to collect information from the accommodation sector at the end of every second month, making this a frequent form for data collection. The tourism levy is a non-taxable amount of 2% from the final charges in booking accommodations, which is paid to the NTB. The information gathered from the levy forms provides the NTB with the funds necessary to market Namibia as a tourist destination, especially in the tourist market abroad. The goal set by the NTB is to generate N$30 million per year in order to further the marketing of Namibia. The reasoning, stated by the NTB in the "Discussion Paper on Tourism Levy," for the taxation of some companies over others is because those who benefit (e.g., the beneficiaries) from tourism should pay the developmental and promotional costs associated with the business. The three beneficiaries include accommodation businesses, tourists, and the general public. Since the tourists do not see the fee associated with tourism, this fee is a hidden cost. The general public benefits from the industry because tourism enhances income and lowers taxes; therefore, the accommodation sector is required to pay a levy tax. In the future, the NTB will discuss

the possibility of a levy tax on the other sectors, including vehicle rental and car hire, tour & safari, and trophy hunting (Namibia Tourism Board, unpublished document).

Similar to the levy system in collecting data, the IPPR currently collects information on tourism statistics from businesses and is generated into reports (IPPR, 2007). Established in 2001, the IPPR's mission is to deliver research and information into an economic, social, or political issue that affects the development of Namibia. The monthly publication from the IPPR contains both text and graphs, though the topic for the report changes monthly. This information is relevant to all those involved in the tourism industry, and the publications are free of charge.

2.2.3 THE TOURISM BAROMETER

While some countries, including Namibia, rely on the use of the TSA, organizations such as the Scottish Tourism Board and the United Nations World Tourism Organization (UNWTO) have developed a tourism barometer to present tourism data in a clear and organized fashion (WTO, 2006). The barometer, considered a subset of the TSA, provides countries and stakeholders with clear statistical data marking trends in certain parts of the tourism sector. A tourism barometer uses indicators, which are data tools used to measure the condition of the tourism industry, as a way of recognizing the important factors influencing tourism, as well as where tourists are focusing their time and money. These indicators include both qualitative and quantitative measurements. By tracking the performance of certain sectors (e.g., accommodation, vehicle rental and car hire, tour & safari, and trophy hunting) over a period of time, the barometer can reveal what business sectors benefit the nation's tourism industry through reviewing market trends. The barometers generated by the Scottish Tourism Board and the UNWTO serve as examples for the type of barometer that the NTB is interested in developing. It is imperative for businesses to acknowledge that a barometer can

help their sector(s) by showing how the various markets are performing, both past and future trends, and what countries the tourists are arriving from.

SCOTTISH TOURISM BOARD – TOURISM BAROMETER

In the spring of 2006, the Scottish Tourism Board commissioned George Street Research Limited (GSR) to administer their tourism barometer (VisitScotland, 2007). GSR is a small independent research company specializing in market research and consultation services for businesses throughout the United Kingdom. Established in 1989, GSR is a member of the British Market Research Association (BMRA) and is located in Edinburgh, Scotland (GSR, 2007). In accordance with the Code of Conduct of the Market Research Society, GSR performs both quantitative and qualitative research for eleven economic sectors, including tourism, through three methods: customer satisfaction surveys, advertising, and branding.

GSR also plays a role in recruiting business members for voluntary participation in a panel, or a sample of businesses, creating the largest voluntary panel in Scotland. By developing this panel, the GSR has been able to provide advice to clients in order to optimize their business potential and increase revenue (GSR, 2007). In total, there are 400 businesses across multiple sectors within tourism including accommodation, tour, transport, and entertainment/event providers. This panel is surveyed to report on their performance in their specific businesses, and also examines trends within certain tourism sectors across Scotland (VisitScotland, 2007). As seen in Table 3, the business surveys are conducted three times a year, called waves, in order to capture important tourism times, such as holidays and seasonality peaks.

Table 3: Schedule for Tourism Barometer (VisitScotland, 2007)

Survey Schedule	Fieldwork	Performance Period Covered
1st Wave	May/Jun	Season to date (including Easter) and looks ahead to main summer season
2nd Wave	Sept/Oct	Season to date (including summer) and looks ahead to autumn/winter season
3rd Wave	Jan/Feb	Season to date (including Christmas and New Year) and looks ahead to spring season

GSR gives the commissioning agency, e.g., the Scottish Tourism Board, a list of dates available for a deadline, which they must agree on for the created questionnaires; lengths of fieldwork (data collection and retrieval); and availability of the results (GSR, 2007). The sampling structure for the panel of businesses is stratified based on size of the firm, region, and sector (GSR, 2007). GSR serves this panel with a questionnaire called an Omnibus survey.

In the UK, an Omnibus survey is a quick and low cost method of answering a small number of questions about markets and opinions (UK Industry-the Omnibus Station, 2008). GSR offers the Omnibus survey as a cost-effective alternative to their full market research services. They use Omnibus surveys with the general public, Scottish business audiences, and Independent Financial Advisers (IFAs) (GSR, 2007).

Based upon the format of the survey, the GSR has a range of prices for creating the Omnibus, depending on the type of question and whether the survey is formed as a cross analysis or weighted system. There are open-ended questions, pre-coded questions, and a rating scale system, which are listed in sequential order from most expensive to least expensive. The answers are analyzed, cross-referenced, and delivered to the client either in tables or as a report. For more general market research purposes, the Omnibus survey consists of three sections: (1) inventory, (2)

standard demographic/classification, and (3) client-specific questions. The methodology of conducting interviews for the Omnibus survey is performed in four ways, as shown below (MRS, 2008):

1. *Computer Assisted Telephone Interviewing (CATI)* is conducted on the telephone. The interviewer administers a computerized questionnaire over the telephone. The respondents listen to the interviewer's question and enter their answer directly into the computer using CATI software. CATI software can personalize the questions and check for illogical answers regarding percentages. CATI is advantageous for its ability to instantly compile data and update reports. CATI is the method that the GSR uses for Omnibus surveys.

2. *Computer Assisted Personal Interviewing (CAPI)* is conducted face-to-face and requires computer access. The respondent answers the questionnaire at a computer screen, while the interviewer serves as a sideline host to aid, if necessary. CAPI is common at business trade shows or conventions.

3. *Computer Assisted Web Interviewing (CAWI)* is conducted via the Internet, similar to CAPI and CATI.

4. *Postal Mail* is the least commonly used method for conducting Omnibus surveys, due to the volume of incoming paperwork and the need for manual labor to compile information, which is more tedious, time-consuming, and error-prone than the computer-assisted methods.

Business panel members are given a choice of their preferred method. After the surveys are compiled into results, the information is presented in a tourism barometer. For The Scottish Tourism Board, the tourism barometer is presented as a Portable Document Format (PDF) file available on their website. The format of the barometer is a combination of text and bulleted points, along with percentages of the panel who felt their tourism business sector was stagnant, growing, or decreasing

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as compared to what is expected for this time of year (VisitScotland, 2007). In addition, the Scottish tourism barometer monitors any changes in the nationality distribution of their visitors (domestic or international), and their type of stay (leisure or business) (VisitScotland, 2007).

As a supplement to the Scottish tourism barometer, the Scottish Tourism Board's Area Director of the Fife[4] region is working with the local council to utilize a Fife barometer, which consists of a comprehensive panel of 101 Fife businesses that answer a survey, which provides more region-specific updates about the state of the tourism industry (VisitScotland, 2006). The purpose of the Scottish Fife barometer is to establish a business confidence monitor (BCM). The BCM is a rating scale with +/- numbers depicting the confidence level of businesses as either optimistic or pessimistic about their industries, as shown in Table 4 (ICAEW, 2006).

Table 4: Key to Confident Index (ICAEW, 2006)

Variable	Score
Much more confident	+ 100
Slightly more confident	+ 50
As confident	0
Slightly less confident	-50
Much less confident	-100

Using the confidence index, the Fife panel originally consisted of 30 businesses; however, they recruited an additional 71 businesses in order to create a more robust sample (VisitScotland, 2006). During the First Term Survey in 2006, the panel was offered three options of conducting the

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[4] Fife is a region in Scotland, located between the Firth of Tay and the Firth of Forth.

survey—CATI, CAWI, or postal mail. Within three weeks, out of the 101 businesses, 29 completed the interview by telephone, 44 through a CAWI, and 28 through a hard copy (VisitScotland, 2006). The questionnaire for the Fife barometer includes similar topics as the tourism barometer, as listed below in Table 5 (VisitScotland, 2006).

Table 5: Topics of Fife Barometer Questionnaire

Topic	Type of reply
Compare the business situation for their sector at the start of the year	optimism /pessimism
Compare the season to previous years	good/average/bad
Total number of customers	increase/same/decline
The level of effect by terrorist threats	none/somewhat/a lot
Expected number of customers in the following season	increase/same/decline
Invest (or plan to invest) in their business in the last or next 12 months	yes/no
Take (or intend to take) online bookings in the last or next 12 months	yes/no
Ease of finding VisitScotland's activities	easy/hard

Using a combination of the regional approach of the Fife barometer and the Scottish tourism barometer, the Scottish Tourism Board has developed a way of monitoring changes throughout the country. In addition, the Scottish Tourism Board has gained insight on the past, present, and future of the health of the tourism industry and its contribution to the economy, which can serve as an example for Namibia's tourism industry.

UNWTO – WORLD TOURISM BAROMETER

Since June 2003, the WTO's World Tourism Barometer has been published three times per year (January, June, and October) (WTO, 2007). This barometer is prepared by the WTO's Market Intelligence and Promotion Department in conjunction with a consultant. The three regular sections of the WTO barometer include the short-term tourism data for that year, evaluations by the *WTO Panel of Tourism Experts,* and relevant economic data.

First, the short-term tourism data presented in the WTO barometer are only preliminary information. Compiled by the UNWTO Secretariat, information from institutions (e.g., central banks, statistics offices, tourism boards) is collected through web sites, news releases, bulletins, direct contacts with officials, or international organizations, such as the Caribbean Tourism Organization (WTO, 2007). The WTO barometer measures two sets of short-term tourism indicators: inbound tourism—international tourist arrivals and international tourist receipts, and outbound tourism—international tourist expenditures and outbound tourism based on origin of the tourists.

In addition, yearly forecasts for the WTO barometer are developed through econometric modeling by Fundación Premio Arce of the Universidad Politécnica de Madrid (WTO, 2007). Econometric modeling is based on the series of monthly data for the number of international tourist arrivals. The model analyzes the trend from the monthly series and makes projections for the short-term future. This model, however, does have its drawbacks—it does not account for external factors and is dependent on the quality and depth of the monthly data series, which are usually preliminary and proxy information.

The panel representatives were also selected from private and public sector organizations. In hopes of expanding the panel, experts who are not part of the current panel are encouraged to E-mail the UNWTO about their interest in participating. Conducted by the UNWTO Secretariat every four months, the panel is E-mailed a survey with two open-ended questions and space for qualitative assessment (WTO, 2007). Below are the two questions included in the survey:

1. What is your assessment of tourism performance in your destination or business for the four months just ended (or about to end) as against what you would reasonably expect for this time of year?
2. What are the tourism prospects of your destination or business in the coming four months compared with what you would reasonably expect for this time of year?

In response to those questions, participants are allowed to select from five options as part of the Tourism Confidence Index (WTO, 2007). The options include much worse [0], worse [50], equal [100], better [150], and much better [200]. These results are averaged, broken down by region and sector activity, and are then presented in a line graph over a period of five years. The prospects and evaluations from the WTO panel have their limitations, as the E-mail survey often yields low response rates for a particular sector, thus skewing the results. Other economic findings are based on projections of economic growth by the International Monetary Fund (IMF), which is dependent on Gross Domestic Product (GDP), oil prices, interest and unemployment rates, and exchange rates (WTO, 2007).

Finally, the results generated by the WTO are presented in their barometer and distributed to its members, which includes 157 countries and territories plus 300 Affiliate Members representing local governments, public and private sector companies—airlines, tour operators, and hotel groups—and tourism associations (WTO, 2007). Non-members are required to pay for the publication and can access the WTO barometer as a PDF in four ways: fax, telephone (to request), website, and E-mail.

2.3 COMMUNICATION STRATEGIES: PRESENTING DATA

The barometer is a useful tool in presenting the information collected on tourism statistics, however, collecting and compiling the information is not the final step. After the barometer is formed, the Scottish Tourism Board decided to make it available through their website in a PDF file. Other methods of presenting information include brochures, flyers, newspapers, and many other forms of communication. Newspapers, such as the *New York Times,* present data in a clear and informative manner. For instance, in the business section of a newspaper, a variety of topics may be

covered, such as stock market prices, the introduction of new companies, or discussing new patents on the market.

The *Namibia Economist* newspaper is one medium for publishing such data and has been active in Namibia since 1991 (*The Namibia Economist*, 2008). Marketing is considered to be a strongpoint for the newspaper and is used to keep the executives of both private and public sectors of the economy informed on current Namibian economic news. In addition to covering marketing, this newspaper also contains articles relating to tourism and its effects on the economy of Namibia. One such article refers to Namibia's expected GDP for 2008 to rise 4.7%, with tourism as a key factor in this rise, according to the Bank of Namibia. The article continues to describe specific areas that are expected to grow this upcoming year and named tourism related industries as one such sector. This online and printed newspaper provides Namibia with well researched, easy to read articles pertaining to its economy and upcoming market prospects.

In addition to using a newspaper, a shorter, more concise format is another option for sharing collected information. A flyer or handout differs from a newspaper because it is only one or two pages long and consists of the most important information each stakeholder group would need. An example is the executive summary of the 2007 Travel & Tourism Economic Research on Namibia that the World Travel & Tourism Council has created. The original document is thirty-six pages; however, they have created a one page overview as seen in Figure 1.
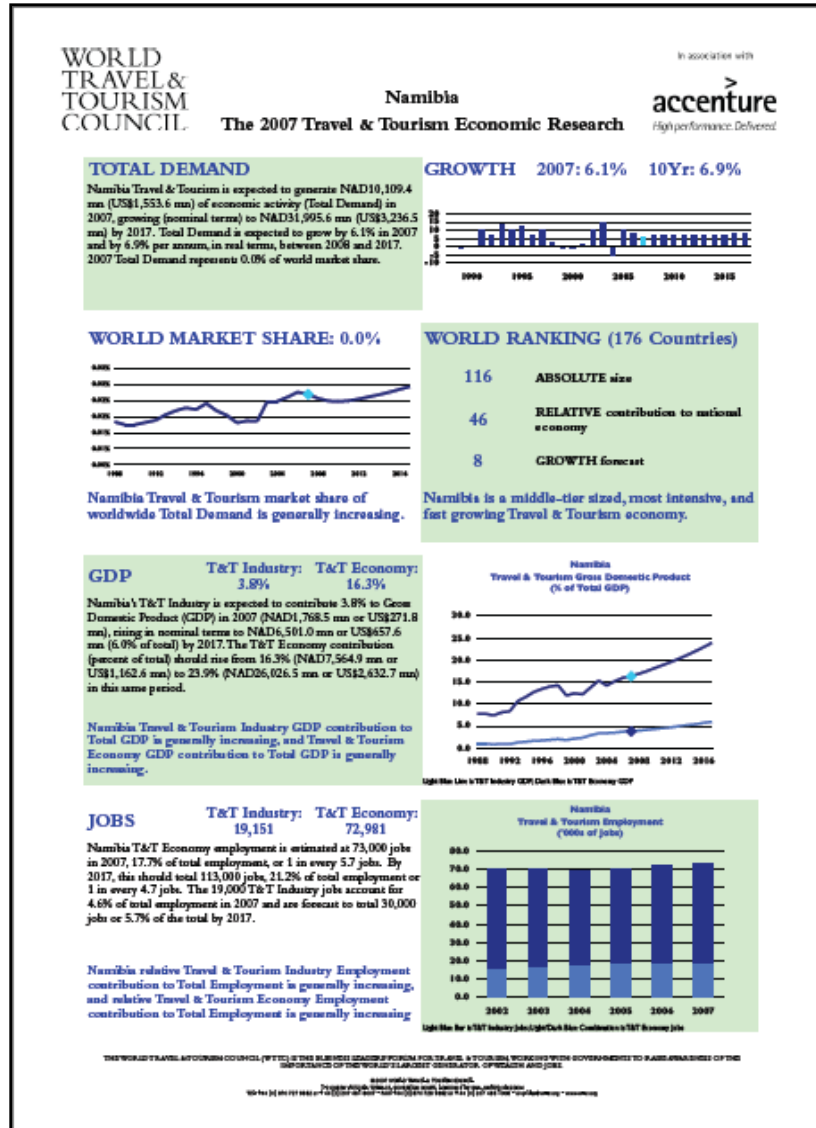
Figure 1: World Travel & Tourism Council Summary for 2007 (WTTC, 2007a)

2.4   TRACKING TOURISM IN FOUR SECTORS

Tracking tourism performance can be organized into different sectors, which is dependent on the type of services available. Some examples of sectors that are monitored internationally are accommodation establishments and vehicle rental operations. There are certain sectors; however, which may be exclusive to a particular country, culture, or region. Two examples of specialized

sectors in Namibia are tour and safari and trophy hunting operators. The following sections will discuss how these four specific sectors currently track tourism and the relevance to the tourism industry internationally.

2.4.1 ACCOMMODATIONS

Many different types of lodging opportunities are available around the world depending on the type of traveler. Since housing is a pivotal part of a tourist's experience, data collection from this sector provides a reliable indication of its performance in the tourism industry. The NTB has divided these establishments into different groups (see Appendix E) such as Bed & Breakfast Establishments, Campsites, Guest Farms, Guest Houses, and Hotels.

In the United States, according to the World Tourism Barometer, the approach to monitoring the tourism performance in the accommodation sector is through enlisting a company, Deloitte, specialized in regularly monitoring hotel performance through a survey, HotelBenchmarkSurvey™ (WTO, 2007). The barometer collects information regarding the occupancy percentage, revenue per available room (revPAR), and average room rate (WTO, 2007).

With the levy forms readily available to the NTB, the majority of the needed information for the barometer is already on hand for the accommodation sector. To expand on the pool of numbers and statistics, information is also available from all 370 members of Hospitality Association of Namibia (HAN) on a monthly basis. HAN is an organization that connects the various accommodation establishments in order to provide assistance. For example, on HAN's website, businesses can research information from previous years to assess the change in market trends over a period of time or take advantage of the E-mail communications through the monthly, quarterly and

annual report. With the extensive compilation of valuable data from both NTB and HAN, the performance of accommodation sector can be regularly tracked.

2.4.2 TRANSPORTATION OPERATORS

The transportation sector, which is comprised of rental car agencies, shuttle services, and other forms of transportation, is also an influential sector in the tourism industry. Enterprise Rent-a-Car is representative of the kind of company that compiles data related to tourist car rental activities. Knowing what information car rental agencies collect, where the information is stored, and how often it is updated, is beneficial when designing a method of collecting data on a frequent basis. According to Ashley Dassatti, an Enterprise employee participating in the management training program, Enterprise is the largest rental car agency in North America, and it continues to grow (personal communication, 06 February 2008). Of five rental categories—retail, corporate, insurance, dealership and body shop rentals—tourists make up a large portion of the rentals. According to the Enterprise office in Salt Lake City, Utah, retail (tourist) rentals and corporate rentals are more prominent near airports, whereas insurance, dealership, and body shop rentals are more prominent in urban areas. This is because tourists and out-of-town business travelers arrive mainly by air and require transportation as soon as they land.

The main category that the computer system uses to sort information is the type of rental, as described earlier as being retail, corporate, insurance, dealership or body shop. It is through this computer system that all of the customer's information is kept, such as credit card data, driver's license information, duration of rental, the type of car being rented, and the purpose of rental. Enterprise uses a computer software program called RALPH 1.0 and 2.0 (the newest version) to store this important information. All of these data are displayed in both a daily and monthly report.

The daily report displays what cars were rented for that day and how much revenue was acquired. They also have a 30-day report which tracks the revenue for that month, the number of cars rented, as well as the type of rental for each customer. Because the computer is able to sort data based on the type of car rental, it makes it easy to distinguish how well the tourism sector is performing relative to the other rental categories.

The current tracking system in the vehicle rental sector in Namibia is utilized by the Car Rental Association of Namibia (CARAN), which sets and reinforces standards for the car rental agencies and businesses. These businesses must meet the minimum standards in order to be members of CARAN. The minimum standards for each company include the following aspects as displayed on their website (CARAN, 2008):

1. Car rental companies must be legally registered corporations complying with the requirements of the Department of Trade and Industry of Namibia
2. Vehicle fleet must consist of at least five vehicles
3. Car rental companies must provide sufficient insurance
4. Sufficient 24-hour assistance in the case of breakdown or accident must be provided
5. Vehicles may not be older than 2.5 years or have completed more than 100,000 km for sedan vehicles and 150,000 km for 4x4 vehicles
6. Vehicles must be regularly serviced and maintained to ensure compliance with roadworthy requirements

Gielie van Zyl is the Vice Chairman for CARAN, the former general manager of a local branch for Avis Rent-a-car, and is currently the owner of B Mobile. He stated that there are 18 registered car businesses with CARAN in Namibia, making up 80% of the business. There is, however, more than three times that number of car businesses in the country of Namibia itself

(personal communication, 14 March 2008). Because vehicle rental and car hire is a major part of the tourism economy in Namibia, CARAN, its members, non-members, and relevant stakeholders, are important for both the gathering and presentation of the data for this sector.

2.4.3 TOUR & SAFARI OPERATORS

The tour and safari operating sector is another large contributor to the tourism industry. More specifically, nature-based (safari) tourism is prominent in many developing regions of the world such as Africa. The Inbound Tour Operating (ITO) sector is comprised of local tour operators that organize trips together on the ground, which has a large impact on tourism destinations (Mayaka and King, 2002). This is because the ITO is responsible for tour design and itinerary planning, formulating quotes, setting up tour packages, producing documentation, and group services such as safari operations and so called "meet-and-greets." Due to its growing demand, safari tourism has risen to be one of the main business sectors in Africa.

Over the years, safari tourism has become a profitable business in both the public and private sector. In Kenya (Akama, 2002), 10% of the country's landmass has been set aside for safari tourism. This is done by conserving the African savanna wildlife. Tourism is the second largest economic sector in this country, contributing over 12% to the GDP. Accommodations, such as first-class overnight lodging, camping, and other facilities, are provided to customers to meet their needs and expectations.

Currently, the NTB uses tour operator fact sheets to build up a collection of data to see what certain companies in Namibia offer, with respect to their facilities and operations. According to Shareen Thude, who is responsible for devising methods of implementing a market strategy for the NTB, if there is a demand for stargazing, someone can look to see which companies offer stargazing.

If there is no company that offers such a tour, then the NTB can notify companies that there is a current demand for stargazing. This is why it is important to have up-to-date information so that if there are any fluctuations in the market, stakeholders can be notified and adjustments can be made, including changes in marketing techniques specific to certain countries or specific seasons.

2.4.4 TROPHY HUNTING OPERATORS

While some tourists travel to Africa to see wildlife and enjoy a different environment, others come to experience a more expensive tourist attraction—trophy hunting—which can cost up to $14,000 USD in some cases (Binding, 2007). Trophy hunting is prevalent in only a handful of countries in Africa—South Africa, Tanzania, Cameroon, Central African Republic, Benin, and Namibia (AfricanHuntingSafaris.com, 2008). This popular sport is widely advertised over the internet and provides tourists with a new experience by allowing them to hunt animals such as leopards, cheetahs, and zebras (Africa Hunting Safaris, 2008). The hunting season occurs at different times and different areas in Africa. Some begin on the first of February and continue through the thirtieth of November. Others start in July and last until the end of December, while certain places do not have a set season at all (Binding, 2007). There are, however, restrictions on the months in which businesses in Namibia are not legally allowed to operate; these months include December and January.

Most hunting excursions offer accommodations, promising luxury, comfort, and amenities while away from home (African Hunting Safaris, 2008). The premier trophy hunting outfitter in Namibia, Ozondjahe, tracks the performance of its organization by seasonality, type of game hunted, duration of the hunt—usually nine to twelve days, number of four-wheel drive hunting vehicles rented, trophy fees paid based on the type of game, and daily rates charged per person.

Many operations also include online registration, requiring the names of each hunter, a telephone number, addresses, and many in-depth questions. Forms for hunters such as firearm permits, visas to enter the country, and fish and wildlife permits are required for expeditions. These forms are not only for the government of the African country being visited, but also for the government of origin the hunter is from and the airline they are traveling with, if the traveler plans on checking a firearm. With these forms, registrations, and visas, information about tourists participating in trophy hunting is easily available for use in developing a tourism barometer.

The permits for the hunters in Namibia can be obtained through the Namibia Professional Hunting Association (NAPHA), which has been active for 36 years and currently contains 460 members. According to Almut Kronsbein, the chief executive officer of NAPHA, the association acts as a communication point between its members and the Namibian government (personal communication 14 March 2008). Almut informed us that trophy hunting operators are separated into three separate categories: (1) farm hunting, (2) free-lance professional hunters, and (3) communal areas or concession areas, each differing in price, ownership of property, and many other aspects. Almut stated that trophy hunting is a lucrative part of the tourism industry in Namibia and continues to grow. The NTB does not currently collect information on this sector, which demonstrates the need for them to keep track of market trends and other statistics related to this business sector.

3.1   INTRODUCTION

This chapter outlines the steps we took in completing our methodology in our efforts to assist the NTB with tracking tourism performance on a more frequent basis. Our first goal was to develop a practical and informative tourism barometer for Namibia to measure trends focusing on four significant tourism sectors: accommodations, vehicle rental and car hire, tour & safari, and trophy hunting. In order to achieve this goal, we needed to develop a method to solicit information from each of the sectors. We chose to use a survey which asks each of the businesses questions based on information that the NTB and the stakeholders would like to see in the barometer. The aim of the barometer includes the following: measuring changes in market performance by sector, compared with the same period in the previous year or from the previous barometer; identifying factors that influence changes in each sector's market performance; and establishing future prospects for market performance by sector. Our second goal was to develop a communication strategy that could provide stakeholders with the timely and relevant information contained in the barometer.

We reached our goals by completing six objectives, as shown in Figure 2: (1) developing a list of key indicators for each sector, (2) identifying and categorizing stakeholders, (3) developing survey forms for each tourism sector based on the key indicators, (4) selecting a trial panel of businesses to provide data for the barometer, (5) creating a prototype database, and (6) creating a sample tourism barometer to serve as the prototype.
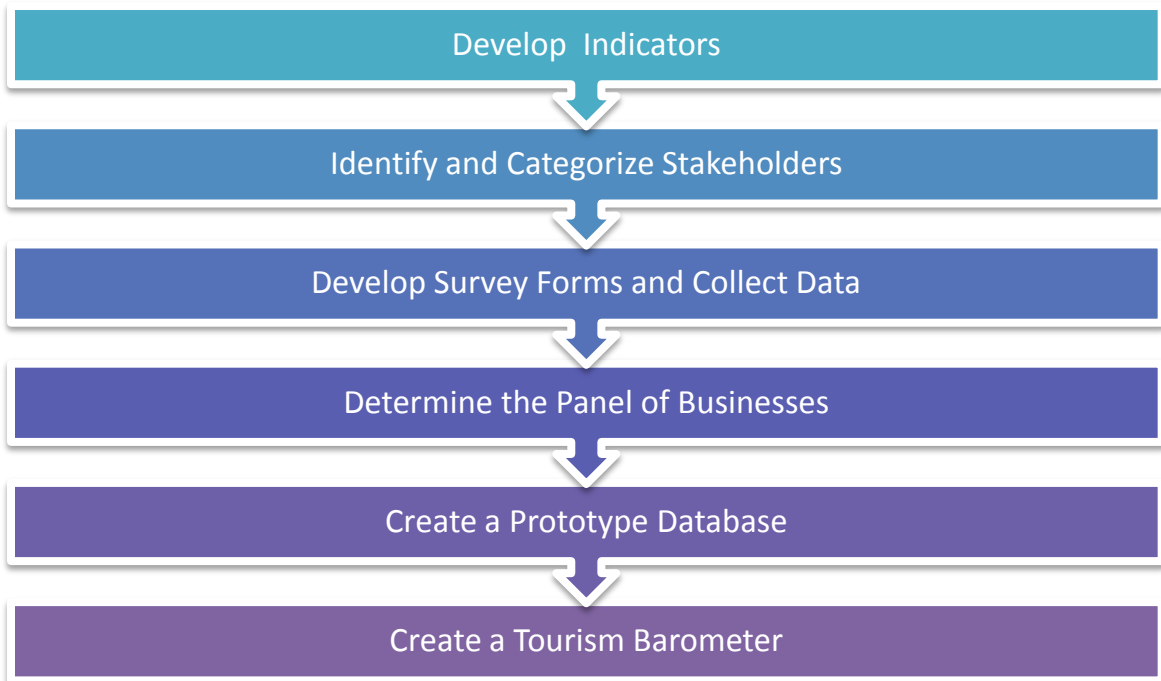
Figure 2: Six Project Objectives

3.2   IDENTIFY KEY INDICATORS

Objective 1: Identify key indicators for each sector that can be tracked regularly

There are two main aspects to consider when managing and collecting tourism data—the types of indicators that must be identified and the manner in which these indicators are organized. Indicators, as defined previously, are tools used to assess the condition of the tourism industry through both qualitative and quantitative measurements. In order to develop a tourism barometer, we focused on selecting key indicators from four sectors within the tourism industry targeted by the NTB. The indicators focused on our goals to measure changes in market performance of each sector, identify factors that influence the market performance in each sector, and establish future prospects for market performance. In order to present our initial list of indicators and make corrections, our liaison arranged interviews with FENATA and the following associations within FENATA:

CARAN, HAN, and NAPHA (see Appendices F for the interview schedule and G for the interview transcripts).

3.3   IDENTIFY AND CATEGORIZE STAKEHOLDERS

Objective 2: Identify a comprehensive list of stakeholders and assign each to an appropriate category.

Our second objective was to choose prominent associations, businesses, NTB staff, and other relevant stakeholders and categorize them into groups. For the purpose of our project, the stakeholders were divided into four categories: Government & Ministries, Travel & Tourism-related Associations, Conservation & Environmental Organizations, and Financial Institutions. The NTB provided our team with an initial list of companies and government organizations across the country, which enabled us to divide these organizations based on the selected categories. Each of these stakeholders is interested in our barometer because they have their own affiliation or interest in the tourism industry. Government & Ministries provide companies within a framework of laws and policies to follow. They also create awareness for the industry, especially when planning and budgeting. Travel & Tourism-related Associations, which includes the NTB, are interested in knowing the condition of the tourism industry for planning and marketing purposes. The Conservation & Environmental Organizations need general information pertaining to the industry. The conservation of the environment is essential to Namibia, especially when considering water management issues and its relation to tourism. The Financial Institutions are included as a stakeholder group because they desire to know how the sectors perform, mainly because tourism is subjected to volatile market conditions, especially concerning loan payments.

3.4 DEVELOPING SURVEY FORMS AND COLLECTING DATA

Objective 3: Develop survey forms for each tourism sector based on the key indicators

As the purpose of the barometer is to present compiled data from tourism businesses throughout Namibia, it is imperative to develop a standard form for data collection. Since some indicators differ among each sector, it required us to create four different data collection surveys. Upon developing a prototype design, we sought to collect data from all registered tourism companies using our survey form. The process of developing an efficient survey and collecting sample data involved creating a preliminary design, distributing the survey to businesses, and collecting the completed survey data.

3.4.1 CREATING A TOURISM SURVEY

In order to collect relevant data from companies within the four sectors, our team designed a survey form in Microsoft Excel for each sector prior to arriving in Namibia, called a Tourism Data Entry Form (TDEF). Using Microsoft Excel as the format for the TDEF allowed for an organized collection of data that could be easily incorporated into a database. The content of the first draft of our TDEF solicited two specific types of information: general information about the company and specific questions for each sector.

The first part of the TDEF collects rudimentary information. While these data may not change frequently, recording the information ensures that the NTB's database is always accurate and up-to-date. Meanwhile, the second part of the TDEF collects sector-specific information based upon the chosen indicators. Formatting the TDEF using a combination of check box questions and open-ended questions allows for the collection of both important quantitative and qualitative data. Due to the nature of the open-ended questions, this does require manual entry and evaluation.

After creating the TDEFs, we began conducting interviews with business representatives in different tourism sectors to review and critique our forms in regards to content, feasibility of collecting the information, the preferred mode of distributing the forms, and suggestions for improvement. Our liaison arranged interviews with FENATA, HAN, CARAN, NAPHA, the Ministry of Environment and Tourism, B-Mobile Car Rental, and the NTB staff. We also scheduled interviews with the Bank of Namibia, Springbok Atlas, CrissCross Namibia, Kea Campers, and Dollar Thrifty Car Rental. Based on feedback from these interviews, we finalized the TDEFs, leading us to our next step of distributing the TDEFs to businesses within the four tourism sectors.

3.4.2 DISTRIBUTING THE SURVEY TO BUSINESSES

After conducting interviews with the prominent associations, businesses, NTB staff, and other relevant stakeholders, we distributed our TDEF in an Excel file through E-mail to Springbok Atlas, Dollar Thrifty Car Rental, CrissCross Namibia Safaris, and Kea Campers. We chose E-mail as our distribution method due to time constraints and the ability of E-mail to return the completed form as an attachment. In addition to distributing the forms to these businesses that were interviewed, we also distributed the TDEF through E-mail to the entire list of NTB registered businesses. The order in which we E-mail the sector is as follows: trophy hunting, tour & safari, and the vehicle rental and car hire operators. Due to the large number of accommodation establishments in Namibia, we chose to E-mail businesses recommended to us by NTB, FENATA, and HAN, in addition to five from each of the thirteen different types of accommodation establishments (see Appendix E). In our E-mails, we explained the goals of our project, as well as the aim of the survey and its benefit to their businesses and all the Namibian tourism stakeholders. We also attached a letter from our liaison introducing our research project and its purpose (see Appendix H).

3.4.3 COLLECTING THE TDEFS FROM BUSINESSES

After the businesses completed the TDEF in an Excel file, each business was required to submit the form back to our project group in an Excel file or by fax, preferably within one week after receiving it. On each TDEF, the proposed due date was displayed on the form.

3.5 DETERMINING THE TRIAL PANEL OF BUSINESSES

Objective 4: Select a trial panel of businesses to provide data for the barometer

In order to develop a data sample for a preliminary barometer, we needed to choose a trial panel of businesses comprised of companies from all four sectors. Due to the uncertainty of the response rate, our liaison recommended that we try to collect five forms from each of the sectors.

3.6 DEVELOPING AND STORING DATA IN A DATABASE

Objective 5: Develop a database that will allow NTB employees to analyze information from each sector

In order to decide which database should be used to store the information from the TDEFs, there were certain considerations that had to be evaluated (see Appendix I). These considerations included who the users are and what tasks they perform; how often the data are updated and who makes these modifications; who provides IT support; what the budget is and what software is available to them; and who will maintain all of the data (Chapple, 2008). We conducted interviews with the IT staff in order to gain insight into the current database that is used by the NTB, the staff member in charge of updating and inputting the data, as well as who provides the IT support. In regards to software restrictions and availability, we conducted interviews with our liaison. After meeting with our liaison and the IT staff, we identified the best method for developing and storing data from the TDEFs into a database.

3.7   DEVELOP A TOURISM BAROMETER

Objective 6: Develop procedures for creating a tourism barometer

When creating Namibia's tourism barometer, there were several guidelines that had to be developed. These suggested steps included creating TDEFs containing questions for businesses in each sector, distributing and collecting the forms from businesses within each sector, selecting a trial panel of businesses from the responses, entering the data into a database, and then presenting the data in the form of a barometer.

3.7.1 PRESENTING DATA THROUGH A BAROMETER

Since tourism has an effect on nearly every economic sector in Namibia, it was essential to recognize what types of tourism-related information must be distributed to different stakeholders. By categorizing stakeholders, our team determined what types of tourism data and analysis were relevant to each category's needs.

In order to determine what information was appropriate to present in the tourism barometer, our team interviewed several representatives from each of the stakeholder groups, as well as businesses involved in the four tourism sectors. Our initial proposal involved separating the information into four barometers for each of the stakeholder groups based on the responses from the stakeholders and what types of data were important to them. Our visual presentation of the barometer was based upon the World Tourism Organization's tourism barometer, which presents both graphical and textual information to display trends in tourism data and future prospects relating to different areas of the industry.

3.7.2 DEVELOPING A DISTRIBUTION STRATEGY

After collecting and analyzing the data using the prototype database, as well as selecting the stakeholders for each sector, we determined the most effective method of distributing our findings to the identified stakeholder groups. Since stakeholders from each division must be provided with up-to-date information, the data must be presented in such a way that will provide useful and clear information.

Several formats had been suggested to present the barometer to stakeholders—an online website, brochures, flyers, as well as other forms of communication. Part of our methodology was to determine which of these forms of communication would be most appropriate and effective. Through interviews, set up by both our liaison and our team with different stakeholder groups and businesses, we asked how they are involved in the tourism industry, explained our project and what it entails, and then presented our ideas for the barometer. They shared with us what information they would like displayed within the barometer and how they would prefer to receive the barometer—whether through E-mail, fax, paper copy, or through an online webpage.

3.8 SUMMARY OF METHODOLOGY

There were several steps involved in carrying out our methodology. These steps involved developing a list of key indicators, categorizing stakeholders, developing the TDEFs for the four sectors, determining the panel of businesses, creating the prototype database, and thus ultimately creating the barometer template. In the proceeding chapters, we will discuss the results and analysis from our methods.

CHAPTER 4: RESULTS AND ANALYSIS

4.1 INTRODUCTION

In order to accomplish our main goals and objectives, we conducted interviews with prominent associations, businesses, NTB staff, and other relevant stakeholders, as outlined in the methodology chapter. Through these interviews, we were able to revise the TDEFs to a final prototype form in order to distribute them to all of the businesses. These interviews also aided us in designing a barometer with the proper layout of information pertaining to all four sectors. Producing an informative barometer allowed us to satisfy the needs of all the relevant stakeholder groups, as well as the individual tourism businesses across Namibia. The following sections present and analyze the results of our research project.

4.2 TDEF DEVELOPMENT

Our initial efforts were focused on finalizing the TDEFs to distribute to businesses with the modifications suggested to us from interviews. Collecting the necessary data was feasible through our TDEFs; and after processing the results, the data were later utilized to develop a prototype barometer. In developing the TDEFs, we updated the lists of stakeholders, gained feedback from interviews with selected stakeholders, finalized our lists of key indicators, and ultimately finalized the TDEFs.

4.2.1 UPDATED LISTS OF STAKEHOLDERS

Prior to our arrival in Namibia, we had compiled a list of Namibian tourism stakeholders and originally grouped them into four separate categories–Government & Ministries, Travel-related Associations, Conservation & Environmental Organizations, and Financial Institutions. Through interviews with stakeholders and the NTB staff, we added more stakeholders to our list; they are

indicated in the following Table 6 and 7 by an asterisk (*). The stakeholders that contain a dagger (†) next to their name refer to associations from which we interviewed representatives. Table 6 shows the updated list of stakeholders from governmental organizations, while Table 7 shows the stakeholder categories from non-governmental organizations. As seen in Tables 6 and 7, we have four stakeholder groups. We have also changed the original name of one category from "Travel-related Associations" to "Travel & Tourism (TT)-related Associations," as suggested by our liaison.

Table 6: Updated List of Stakeholders from Governmental Organizations

Category	List of Organizations, Associations, and Ministries
Government & Ministries	- Ministry of Environment & Tourism† - Ministry of Fisheries & Marine Resources - Ministry of Foreign Affairs - Ministry of Mines & Energy - Ministry of Trade and Industry - Ministry of Defense* - Ministry of Agriculture, Water, and Forestry* - Ministry of Education* - Ministry of Finance* - Ministry of Gender Equality & Child Welfare* - Ministry of Health and Social Services* - Ministry of Home Affairs & Immigration* - Ministry of Labour & Social Welfare* - Ministry of Regional, Local Government & Housing & Rural Development* - Ministry of Safety & Security*

Table 7: Updated List of Stakeholders from Non-Governmental Organizations

Category	List of Organizations and Associations
Travel & Tourism (TT) Related Associations	- Hospitality Association of Namibia (HAN)† - Car Rental Association of Namibia (CARAN)*† - Namibia Tourism Board (NTB) * - Association of Namibian Travel Agents (ANTA)* - Tour Guide Association of Namibia (TAN)* - Namibian Academy for Tourism and Hospitality (NATH) - Air Namibia - B & B Association - Namibia Holiday & Travel - Desert Express Luxury Train - Tour and Safari Operators Association (TASA) - Namibia Wildlife Resorts - Tourism Related Namibian Association (TRENABA) - Other TT Businesses, not affiliated members with any association*
Conservation & Environmental Organizations	- Namibian Professional Hunters Association (NAPHA)† - Namibian Association of Protected Desert Areas (NAPDA)* - Cheetah Conservation Fund - Desert Research Foundation of Namibia - Namibia Community Based Tourism Assistance Trust (NACOBTA) - Namibia Nature Foundation - World Wildlife Fund - Regional Tourism Organization of Southern Africa - Scientific Society of Namibia
Financial Institutions	- Standard Bank of Namibia† - Bank Windhoek Limited - City Savings and Investment Bank - Commercial Bank of Namibia - First National Bank of Namibia Ltd

4.2.2 STAKEHOLDERS' FEEDBACK ON TDEFs

From our interviews conducted with twelve stakeholder representatives as well as our liaison, we were able to receive feedback of our forms in regards to content, feasibility of collecting the information, the preferred mode of distributing the forms, and suggestions for improvement. We incorporated their criticism into our preliminary lists of indicators and our initial TDEF design. Table 8 is a compilation of the comments contributed by the stakeholders, such as information that

may be difficult to collect, terminology that should be revised for clarification, and other relevant information recommended to be included on the final TDEFs. Appendix G provides the interview transcripts we conducted with the stakeholders.

Table 8: Stakeholder Commentary

Category	Comments
Possibly difficult to collect	• Type of guest (holiday, business, conference) • Any financially sensitive information, e.g. revenue
Revise terminology	• List of vehicles offered • Change "prices" to "rack rates"[5] • Change "nationality of clients" to "country of present residence"
Recommended to include	• Length of stay • Nationality of clients • Average length of car rental (billed days) • Cost of car rental • Occupancy in accommodations • Average room rates • Number of hunters • Average daily rates and trophy prizes • Age groups of visitors in tour & safaris • More opinion-based questions • Major capital investments • Comparison of business performance across 3 years

4.2.3 FINALIZED INDICATORS

In response to the feedback gained from our interviews with the stakeholders, we made revisions to our preliminary list of indicators, creating a final list to be included in the TDEFs. Table 9 displays the sector-specific indicators. The recently added indicators are designated with an asterisk (*).

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[5] Rack rates are published rates or full prices charged for services provided by a business.

Table 9: Finalized List of Key Indicators for the TDEFs

Accommodation Establishments

- Type of guest (holiday, business, conference)
- Compare changes in rack rates from the same two-month period of the previous and current year, e.g. Jan-Feb 2008 vs. Jan- Feb 2007*
- Factors influencing changes in rack rates*

Vehicle Rental and Car Hire Sector

- Type of vehicles offered
- Average billed days
- Total number of rentals*
- Compare changes in rack rates from the same two-month period of the previous and current year*
- Factors influencing changes in rack rates*

Tour and Safari Sector

- Type of tours offered
- Average length of trip
- Compare changes in rack rates from the same two-month period of the previous and current year*
- Factors influencing changes in rack rates*

Trophy Hunting Sector

- Total number of all game hunted
- Number of each type of game hunted
- Compare changes in trophy fees and daily fees from the same two-month period of the previous and current year*
- Factors influencing changes in trophy and daily fees*

All Four Sectors

- Total number of clients*
- Total number of clients based on their country of present residence*
- Expectations for the number of clients in the upcoming two-month period*
- Specify the amount spent on major capital investment(s)*

There were two indicators deleted from our updated list, not depicted in Table 9. We removed revenue as an indicator, because businesses were reluctant to provide such financially sensitive information, especially when it is not required by law. Additionally, we removed what types of services are offered as an indicator, because the NTB registration number already encodes for this information.

4.2.4 TDEF DESIGN

The finalized TDEFs (see Appendix J) were created in a Microsoft Excel 2007 file, as seen in Appendix F. The top portion contains a few rudimentary details, e.g., the name of the business, the NTB registration number, the date of the submission, and the contact person. In formatting the TDEFs, we also inserted the NTB logo, a specified two-month marking period, and a deadline to return the TDEFs to the NTB. The latter portion of the TDEFs contains eleven questions, formatted as check box or open-ended questions to collect opinions from the trial panel of businesses. In designing a feasible and informative data collection form for the NTB, we identified several key characteristics of our TDEFs in relation to their content, organization, and style that are listed in Table 10.

Table 10: Key Characteristics of the TDEFs

Attributes	Features
Content	• Responses to the questions directly measure the indicators • Information solicited was feasible to be collected every two months • Requested very little confidential information • Solicited opinion-based questions to gain, more responses about their business performance • Carefully considered word choice • Avoided jargon and abbreviated words • Included an 'other ' option as a response to enable businesses to record additional relevant information • Contained a concluding comments/suggestion box
Organization	• Concise 2.5-page form • Local sequence flow and transition between the questions, e.g., all client-related questions placed together • User-friendly questions • Used a balanced rating scale of increase/ no change/ decrease
Style	• Memorable name of the data collection form, e.g. Tourism Data Entry Form (TDEF) • Visually appealing • Used color scheme based on the NTB logo • Designated rows of answers in an alternating color-coded fashion • Emphasized key words within the question as bold and underlined • Accompanied the TDEF with a cover memo

4.3 TDEF Findings

The distribution and collection of our TDEFs to NTB's registered businesses were quite successful. We received 71 responses from all four sectors, a yield of 8.0%. Through these responses, we improved upon our communication strategy, gathered information about response rates, and collected the comments and concerns of businesses from the TDEFs. Most importantly, we formed a panel of seven businesses within each sector with the responses we received; the information from these businesses will be included on our sample barometer.

4.3.1 Distribution and Collection of TDEFs to Businesses

In order to collect information to construct a prototype barometer, we sent E-mails to 877 registered businesses in the four sectors. Our liaison suggested an additional 12 businesses within the tourism sectors to E-mail because she felt that these establishments would be the most helpful in responding. The E-mails contained a brief overview of what our project entailed, along with a request to complete our attached TDEF for the marking period of January to February of 2008. We also requested each business to fill out and return the attached TDEF by E-mail in a Microsoft Excel 1997-2003 file.

We gave the businesses one week to complete the form and return it to our team. We began receiving TDEFs within the same day, and compiled a total of 43 responses within the first week. We then sent out a reminder E-mail after one week to businesses in the vehicle rental sector. We explained our project again, attached the letter from our liaison further explaining our project (see Appendix H), attached the TDEF to the E-mail, and gave them one more week to complete the form. After two weeks, a total of 71 businesses had responded. Tour & safari operators and trophy

hunting operators provided the most responses, with 30 and 28 businesses, respectively. Seven accommodation establishments as well as six car rental operators also returned the forms.

When considering the responses to our survey, we received both positive and negative feedback. While most businesses that responded were comfortable with filling out the TDEF, others expressed their apprehension and requested to be omitted from our project. A few businesses were responsive, but called for clarification about the confidentiality of the TDEFs and the intended use of the information. In response to the inquiries, we assured the businesses that their information would remain confidential, and that the information collected through the TDEFs would be used to form a barometer. We further explained the value of their input on the TDEFs and the benefits of the barometer, which includes a display of market trends, international visitor influx to Namibia, and future trends for their respective sector — all categories relevant to the success of their business.

Many trophy hunting operators also sent us E-mails, informing us that the marking period of January to February 2008 is not applicable because it is illegal to hunt in January; the official season begins the first of February and ends the thirtieth of November. Therefore, we re-sent the forms through E-mail, asking them to fill out the revised forms for the months of February and March 2008 instead. Although some trophy hunting operators filled out the corrected TDEF, others still filled out the original form for the time period of January to February 2008. After discussing this issue with our liaison, we have decided that in the future, the TDEFs will collect information from the trophy hunting sector for the months of January to February, as well as November and December, even though no information about January or December will be included. A note will be added to these forms explaining that the NTB understands that January and December are not within the hunting season, and to only fill out information for February and November on these forms.

4.3.2 Responses From TDEFs and Forming a Panel

We distributed 877 E-mails with attached TDEFs to all registered business in the three sectors of vehicle rental and car hire, tour & safari, and trophy hunting. For the accommodation sector, we distributed TDEFs to five businesses from each of the thirteen subcategories such as bed and breakfast, hotel, and guest farm. Despite many faulty E-mail addresses, we received a total of 71 responses. Table 11 shows the number of TDEFs sent out through E-mail with the number of responses.

Table 11: TDEF Distribution and Number of Reponses

Tourism Sector	Number of E-mails Sent	Number of Responses
Accommodation	76	7
Vehicle Rental & Car Hire	62	6
Tour & Safari	377	30
Trophy Hunting	362	28

The distribution and number of responses listed in Table 11 were then inputted into percentages. Figure 3 displays the breakdown of the 71 TDEF responses in percentages, which yielded the following: accommodation–9.9%, vehicle rental and car hire–8.5%, tour & safari–42.3% and trophy hunting–39.4%. This graph shows that the tour & safari and trophy hunting sectors were the most responsive to our TDEFs.
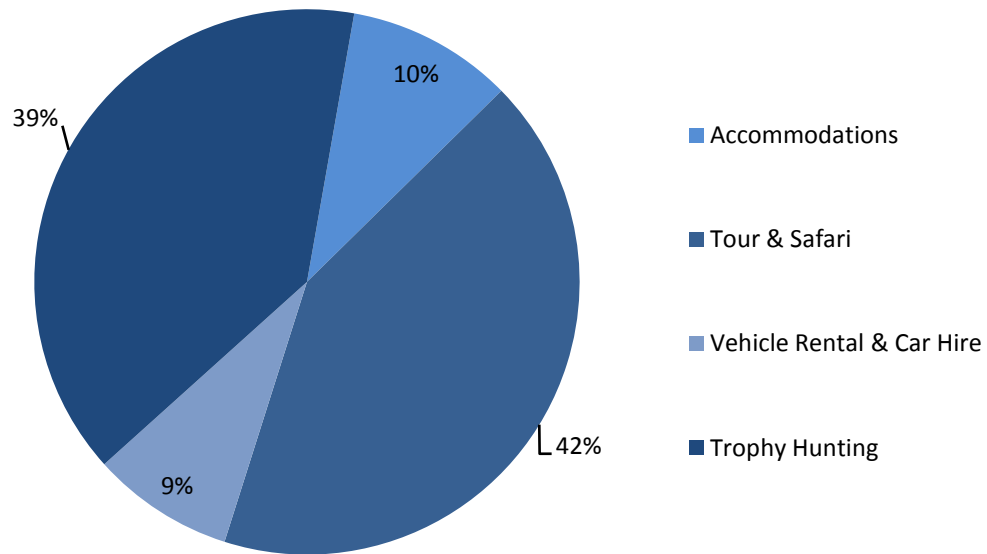
Figure 3: TDEF Response Percentage per Sector

We then calculated the percentage of TDEF responses per sector out of the total 877 businesses as seen in Figure 4. Based on the number of TDEFs distributed, we received a range between 7.73% and 9.68% response rate across the four sectors. This amount of responses provided adequate information to help generate graphs, which were later inputted into our prototype barometer.
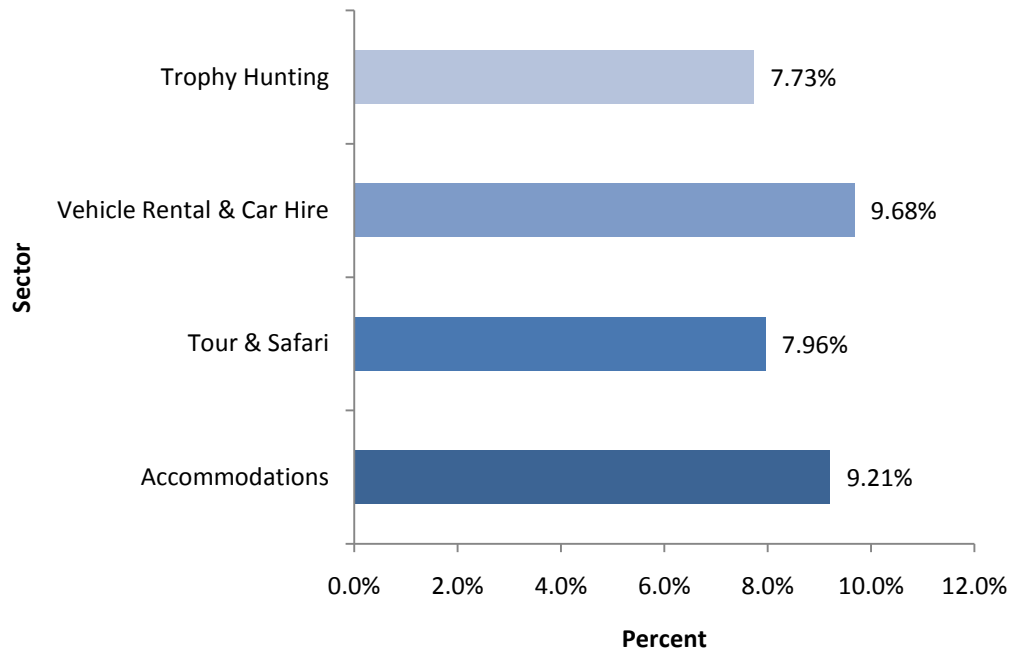
Figure 4: TDEF Response Percentage for 877 Registered Businesses

From the voluntary number of responses we received, we then formed a small nonscientific sample of businesses called a trial panel. This trial panel included seven businesses from the three sectors of accommodations, vehicle rental and car hire, and trophy hunting; because we wanted to include multiple subcategories within each sector during our limited timeframe. We then included only six business responses for this panel due to the lower response rate. Additionally, this sector has a much smaller number of registered vehicle rental and car hire businesses (62 with E-mail addresses) relative to the other sectors. The information supplied from our trial panel served as the prototype data for the initial barometer. According to Gitta Paetzold of HAN, a 10% response rate should provide an adequate sample size for analysis. However, we used an 8.1% response rate as sufficient data to put together the trial panel of businesses. Table 12 lists the 27 businesses that served as the trial panel.

Table 12: List of Trial Panel Business

Sector	Businesses
Accommodation	Oshakati Country Hotel (Pty) Ltd, Kashima B&B, The Bahnhof Hotel Aus, Beach Lodge, Twyfelfontein Country Lodge, Solitaire Country Lodge, Hotel Prinzessin Rupprecht
Vehicle Rental	Dombusch Car Hire, M. Steencamp, Impala Car Hire CC, Cross Roads Car Hire, Cheetah Car Hire
Tour & Safari	CrissCross Namibia, Ndandi Safaris CC, Suricate Tours & Safaris t/a ECCO, Omanda Desert & Wildlife Tours, Afri Xperience Tours CC, Bwana Tucke-Tucke CC, African Elephant Tours
Trophy Hunting	Keerweder Hunting Safaris, Trophy Trackings Hunting Safaris, Vieranas Safaris, Farm Kuduberg, Jan Oelofse Hunting Safaris, Otjinuke Hunting Ranch, Khan River Lodge

Although the sample size of businesses and the response rate may seem miniscule, the time frame for the businesses to respond was one week, supplemented by a one week extension for the car rental sector. We are hoping that in the future, when the businesses are notified well in advance, the response rate will increase substantially. Through our findings, we also identified mechanisms to increase the response rate for the future once implemented, which we discuss in Chapter 5.

4.3.3 COMMENTS AND CONCERNS FROM BUSINESSES

While the TDEFs were being distributed and collected, we compiled a list of problems that we had encountered with our methods, including:

1. The hunting season for the trophy hunting sector (as discussed previously)
2. Some businesses incorrectly reported numbers instead of checking boxes for particular questions on the TDEF
3. Some businesses did not use Excel when sending the form back to us, and inserted the information into the body of an E-mail

4. Some businesses did not send the TDEFs, as requested by E-mail, but preferred to fax the form instead
5. Some E-mail addresses from the NTB's list were expired or invalid

Based on the problems mentioned above, we made several corrections to our TDEF and our method of distribution. First, we corrected the marking period on the trophy hunting TDEFs to reflect the months of February and March 2008. Second, we revised the check box questions by including more precise instructions in the question to check one response. Third, we specified that each business should submit the TDEF in a template Excel file through E-mail. This was done after realizing that the first E-mail did not specify how the TDEF should be returned to us. However, those who initially E-mailed us did return the forms to us by E-mail regardless of the fact that they were not asked to do so. Therefore, we included this request in the remainder of our E-mails to the businesses in order to reduce confusion. Fourth, we accepted the faxed TDEFs in lieu of the E-mail copies. Finally, we compiled a list of the incorrect E-mail addresses and informed our liaison so that the NTB could correct its E-mail distribution list.

4.4   DATABASE DESIGN

After the TDEFs had been finalized for the four sectors, the next step was the design of a database that would store the information collected from the forms. When considering which database to use, Microsoft Access was chosen because of its reliability and level of efficiency for the NTB, and most importantly, because of its availability. The NTB currently uses Microsoft Access for its levy system data, implying that this database is the one that the NTB is familiar with. Due to its compatibility with Microsoft Excel, Microsoft Access can compile submitted data from companies to provide a master data source, including all the NTB registered companies nationwide.

Additionally, since Microsoft Access is part of the NTB's Microsoft Office package, it was the most suitable choice.

After meeting with Leslie Tjiramba from the NTB IT department, he informed us that he will be able to set up the system after we provide him with recommendations. He also informed us that the NTB has employees who currently input data from the accommodation levy forms when they are sent into the NTB. These employees could also input data from the TDEFs. The NTB also contracts IT technicians to update its system. These are all viable options in terms of data input for the TDEFs. Furthermore, there are NTB staff members in the marketing department who are able to update the information for the barometer when necessary. This made it possible to implement our ideas for the database design in Microsoft Access, knowing that there will be staff members able to monitor it and make any necessary updates (see Appendix K for database design PROCESS).

4.4.1 THE PRACTICALITY OF A DATABASE SYSTEM

While is it not essential to understand every technical aspect of how the database was designed, Appendix K provides a detailed description of how the system was created. It is crucial to understand how the received TDEFs were turned into a barometer. The following visual diagram of the implementation process can be viewed in Figure 5. Once all the TDEFs were received, they were manually inputted into Microsoft Access for storing and organizing purposes. At the end of the TDEF collection period when all needed forms were inputted, an organized table was compiled that contained all data received within each cycle. This information was then be divided into two groups—qualitative and quantitative data. For the quantitative data, information was exported into an Excel format at which point graphs could be generated to show patterns and trends. The qualitative data was complied to provide written results that inform interested parties with items

which cannot be describe with graphs and charts. The combination of the two was inputted in a barometer format which is then distributed as a finished document to stakeholders.
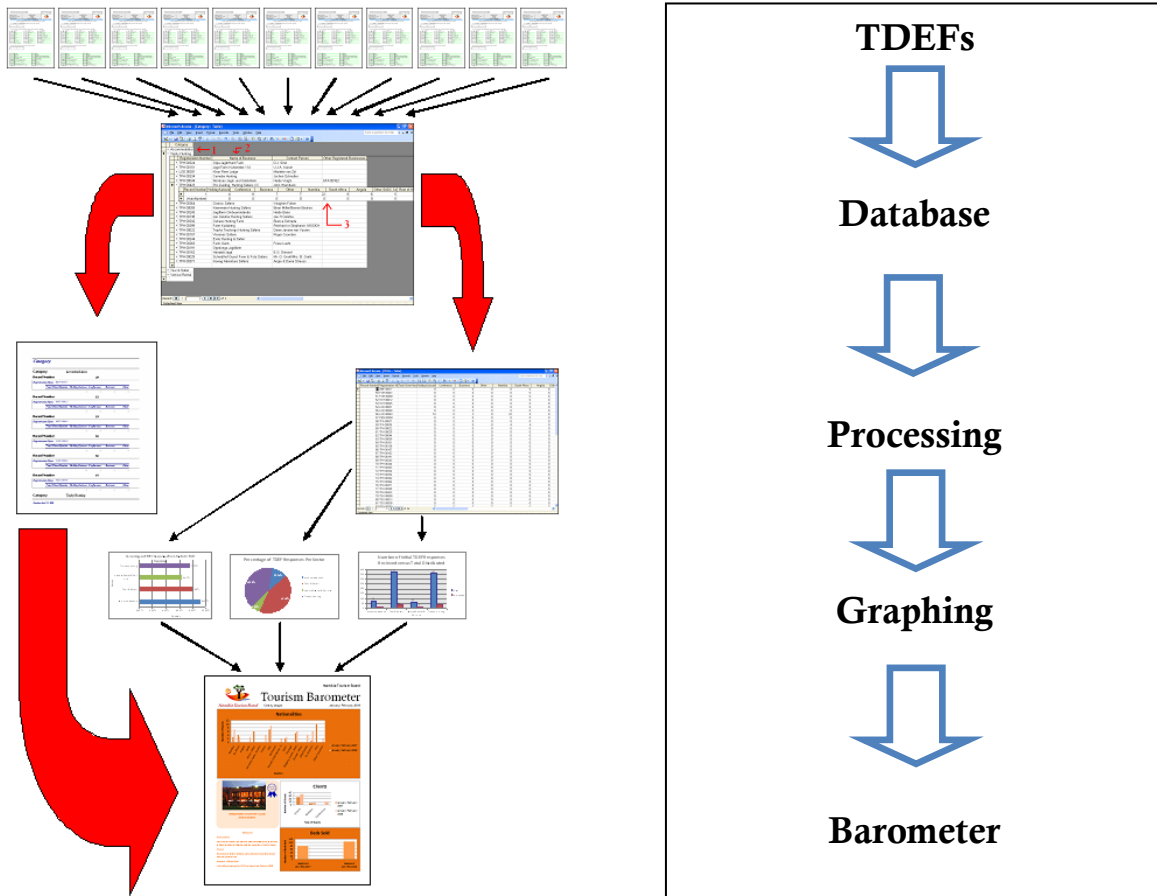
Figure 5: Process of the TDEFs through a Database and into the Barometer

4.5   BAROMETER DESIGN

One of our major goals was to create a barometer to present tourism-related data to the relevant stakeholders. From the interviews we conducted, it became evident that we needed to create a six-page document that summarizes all of the important information pertaining to the four sectors. The information on the barometer corresponds to a two-month period as indicated in the top right corner of the barometer: January & February, March & April, May & June, July & August, September & October, and November & December. Because the trophy hunting sector does not operate in December and January, the TDEFs for November & December for this sector only include the information from November. Similarly for January & February, only the data from February will be included.

The barometer was created using Microsoft Publisher 2007 (see Appendix L). It was designed to contain both text and graphs, which are properly labeled for each sector. The data that are collected and stored in the database are easily converted into graphs, which are then inputted into Publisher. Through many interviews, we gained insight into what to include in the barometer, as well as how to format it. We learned that stakeholders interested in accommodations prefer to see the occupancy rate, country of present residence of guests, changes in rack rates, and the type of guest. When stakeholders involved with vehicle rental and car hire viewed our initial idea for the barometer, they suggested we include length of stay, number of billed days, and the client's country of present residence. Similarly for the tour & safari sector, stakeholders were interested in the types of tours offered, average length of trip, change in the number of clients and change in rack rates. For stakeholders interested in the trophy hunting sector, they recommended we include the hunter's country of present residence, their average length of stay, and the average cost of trophy animals. With the feedback we received, we made the necessary corrections to our TDEFs, thereby enabling

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the creation of a barometer that includes all of the information relevant to the stakeholders. Because some stakeholders may be interested in more than one specific sector, we included all sectors into a composite barometer that could be distributed to the stakeholders in all tourism sectors.

The color scheme for the barometer matches that of the NTB logo, which is brown, orange, yellow, red, green, and blue. The barometer layout will remain the same from publication to publication; however, the information will be updated according to the months it corresponds to. All four sectors are displayed in the barometer; the information pertaining to all sectors is included on the cover and back page and the sector-specific information is included in the appropriate sections of the barometer. To alleviate any confusion and also enable greater legibility of the graphs, the six-page barometer contains a cover page with a contents box, a back page and a page specific to each sector. In order to include all the necessary graphs and text, each sector required its own page. The following tables and graphs, presented in the subsequent sections, are those used in the sample barometer, and contain only the information collected from the trial panel of businesses. The organization of the barometer is as follows: Cover Page, Accommodations, Tour & Safari, Vehicle Rental and Car Hire, Trophy Hunting, and Back Page. The complete layout for the barometer is displayed in Appendix L.

4.5.1 COVER PAGE

The cover page of the barometer, which follows an orange, red, and blue color scheme, contains the Namibia Tourism Board logo in the top left corner, the title and slogan of the barometer in the right hand corner, with the volume number, issue number, and month of publication underneath the title on the right-hand side. The first page of the barometer also contains an introductory paragraph explaining the barometer, its purpose, and the sectors and months it pertains

to. It includes a contents box to enable quick and easy viewing. Along with the introduction and contents box, the barometer contains one graph for the country of present residence of the guests in the accommodation, tour & safari, and vehicle rental and car hire sectors (see Figure 6) according to the 22 respondents, and two text boxes containing information on the changes in the country of present residence and the top five markets to enter. Based on the responses, the top five markets businesses would like to enter include: (1) United States of America, (2) Sweden, (3) Norway, (4) Spain, and (5) United Kingdom.
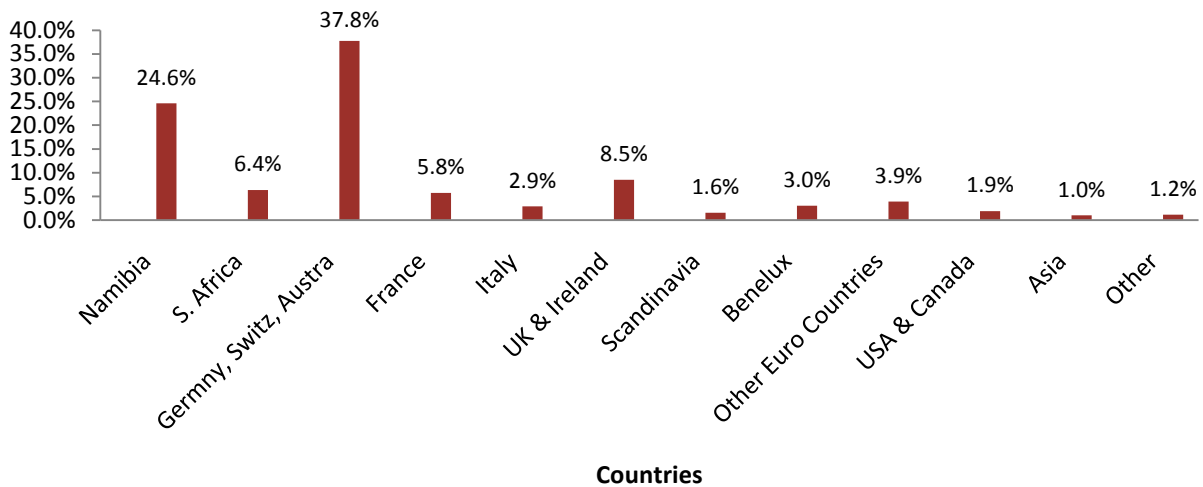
Figure 6: Country of Present Residence for Accommodation, Tour & Safari, Vehicle Rental and Car Hire: Jan-Feb 2008

4.5.2 ACCOMMODATIONS

The accommodation sector is displayed in blue on the second page of the barometer. The first graph, Figure 7, displays the average number of clients based on the type of visit. This allows

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one graph to represent the responses from two questions from the TDEF, leaving more room in the barometer for other information. According to this graph, 75.3% of the visitors were on holiday/leisure, 23.8% were on business, and 0.9% were visiting for a conference during this two-month marking period.
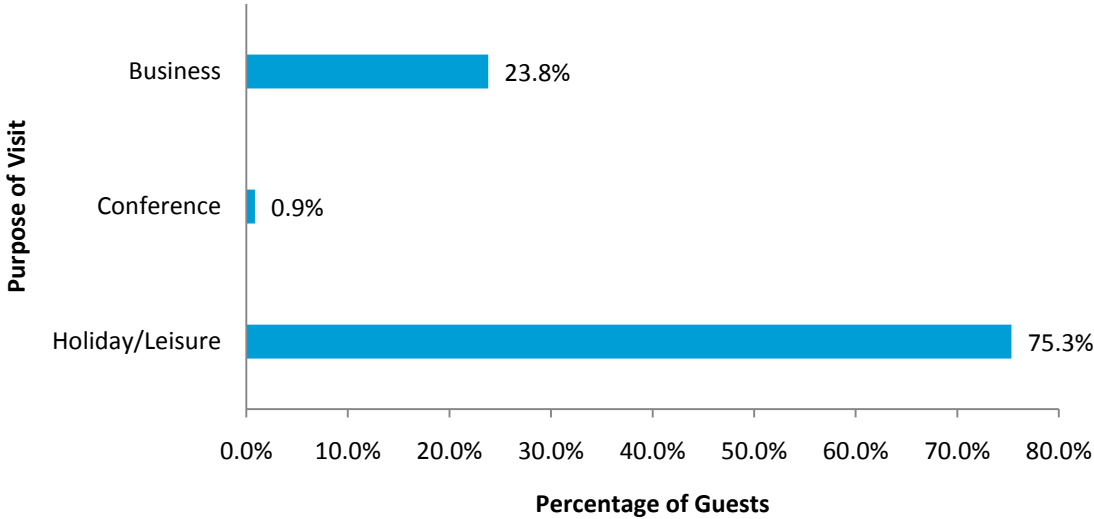
Figure 7: Average Number of Clients Based on Type of Visit

Figure 8 shows the expected changes in the number of clients for the months of March and April 2008 from seven respondents. This question is used to gather information on the future prospects of the industry, allowing stakeholders to anticipate future trends and fluctuations. This graph will be used to compare the expected and the actual values as more issues of the barometer are published.
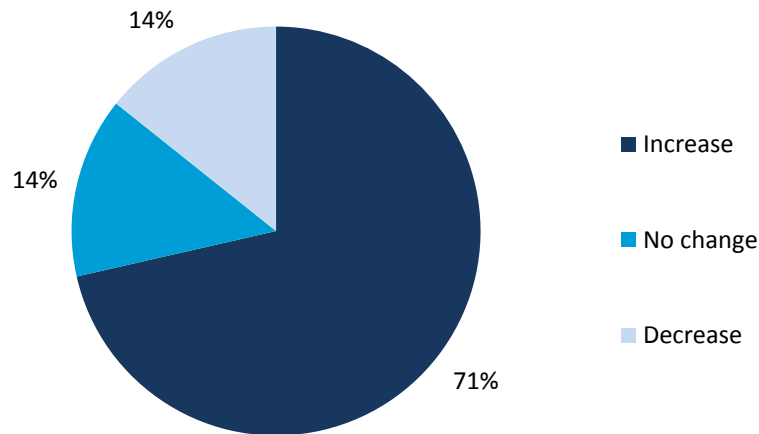
Figure 8: Accommodations: Expected Change in Number of Clients: March-April 2008

In terms of rack rates, these data can be seen in a text form, and therefore a graph is unnecessary for this type of data. According to the seven respondents, rack rates have increased at an average rate of 8.3% from January to February 2007 to January to February 2008. In conjunction with the average increase in rack rates, the page for the accommodation sector contains a graph of the factors that influence rack rates (see Figure 9). The options include electricity, exchange rate, food prices, gas prices, interest rates, labor costs, natural disasters, seasonality, taxes, and other. Of those, 22.7% of the respondents reported food prices as being the most influencial factor affecting rack rates.
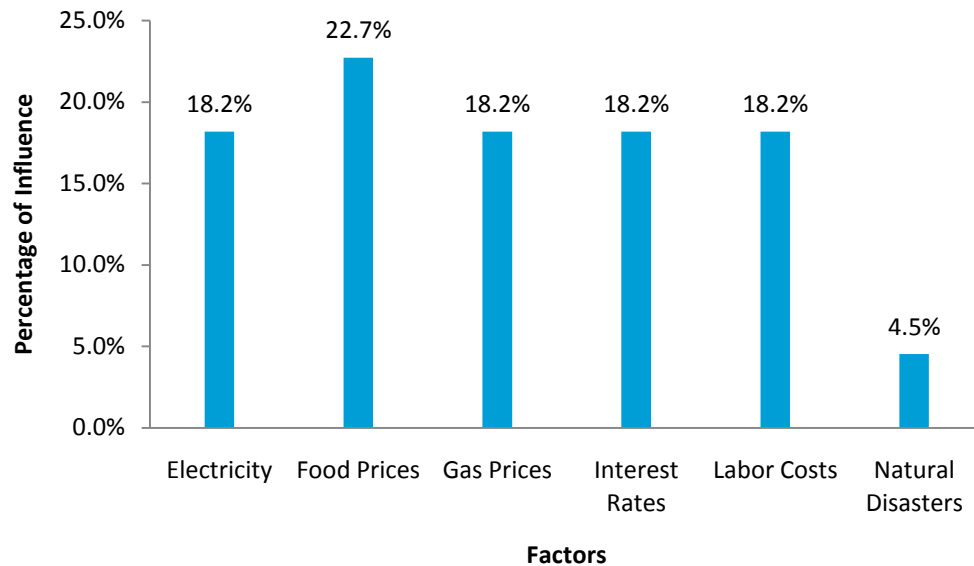
Figure 9: Accommodations: Factors Influencing Rack Rates: Jan-Feb 2008

4.5.3 TOUR & SAFARI

The tour & safari sector is displayed in green on page three of the barometer, showing graphs for the percentages of the types of tours given, factors influencing rack rates, average length of trip, and the expected change in the number of clients for the upcoming months. The number of respondents for each graph was seven; however, only six responses were given for the expected change in the number of clients for March to April 2008.

The barometer for this sector contains a graph showing the division of the types of tours offered, such as scheduled, self-drive/fit, camping, special interest, group, overland, fly-in, and other. According to Figure 10, 21.4% of the businesses offered self-drive/fit tours and 17.9% offered special interest tours. The overland tours and "other" tours made up 0% and 7.1% of the offered tours, respectively, and thus were the least popular tours offered in January to February 2008.
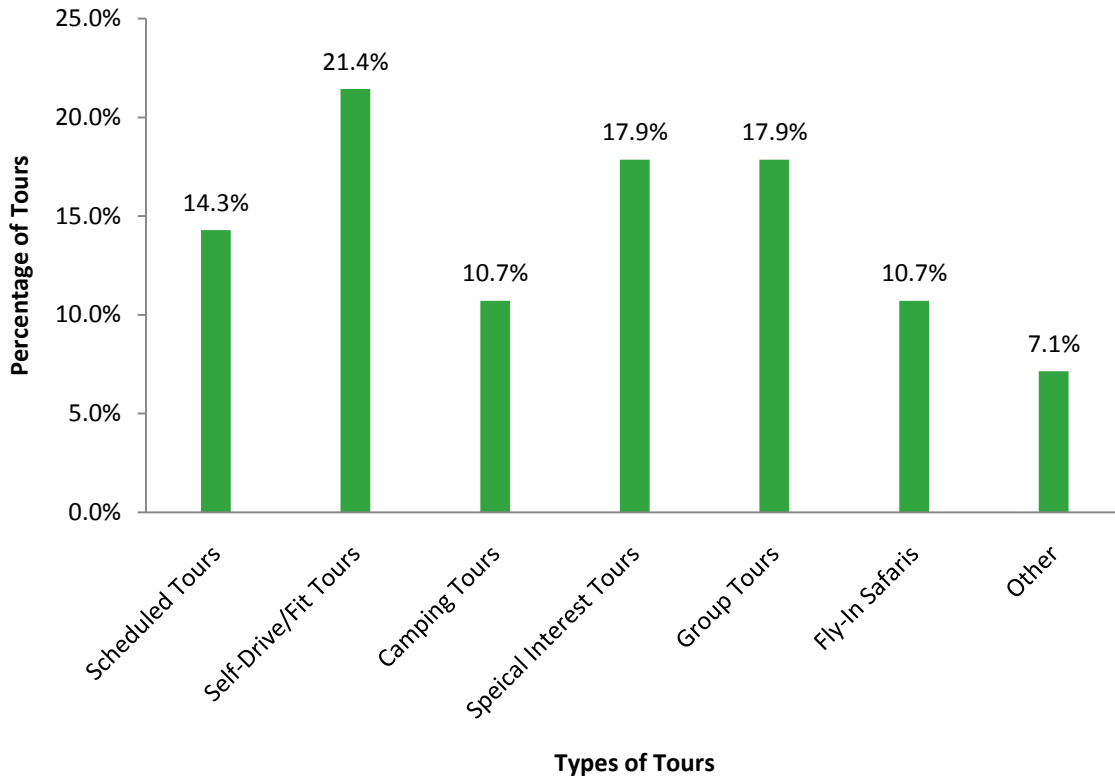
Figure 10: Percentages for Types of Tours Given

Figure 11 displays the information on the rack rates. From the seven respondents, 25% reported that gas prices influenced rack rates and 20% reported that food and interest rates also affected the rack rates. Overall, according to the respondents, rack rates have increased at an average rate of 8.75% since January to February 2007.
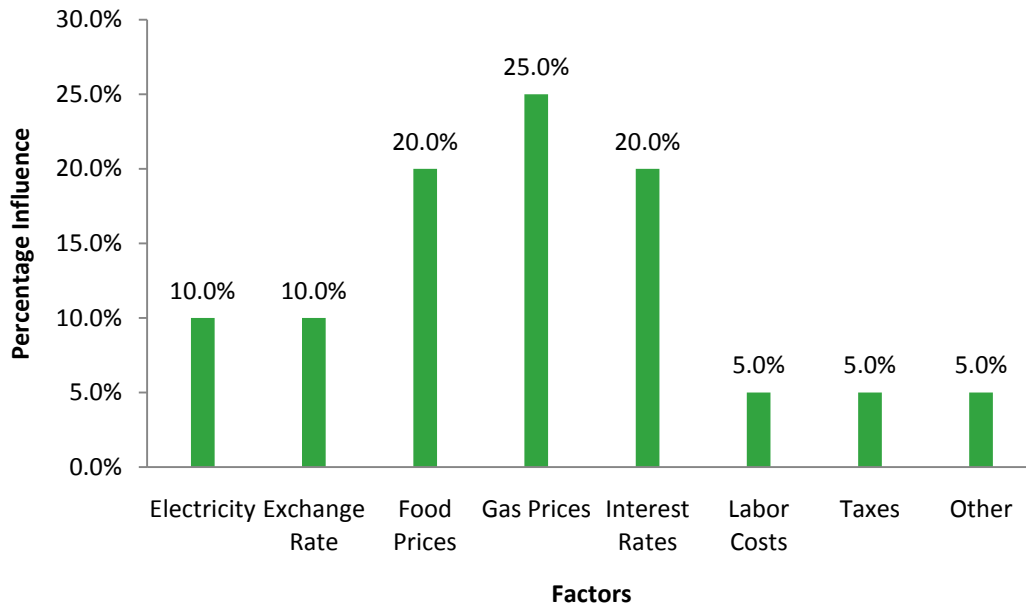
Figure 11: Tour & Safari: Factors Influencing Rack Rates: Jan-Feb 2008

The most common trip duration, according to the seven respondents for the January to February 2008 months, were the 9-12 day and the 13-16 day trips, both representing 43% of the total respondents. The 1-4 day trip, which made up 14%, was the third most popular length of trip.
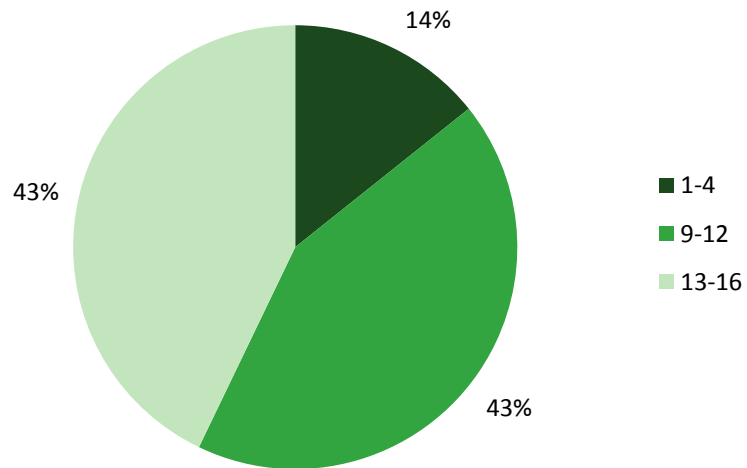
Figure 12: Average Length of Trip (Days)

The expected change in the number of clients for the months of March and April 2008 are seen in Figure 13. Out of the six responses, 57% of them surmise that there will be an increase in the number of clients, and 43% believe that there will be no change in the number of clients. There were no responses anticipating a decrease in the number of clients.
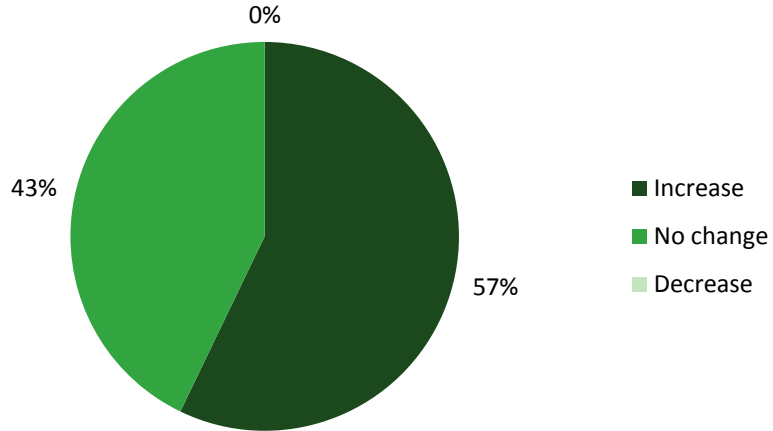
Figure 13: Tour & Safari: Expected Change in Number of Clients: March-April 2008

4.5.4 VEHICLE RENTAL AND CAR HIRE

Six businesses responded to the TDEF from the vehicle rental and car hire sector, which comprised the initial panel. From the data collected from the six businesses, we constructed a graph of the types of vehicles offered, which can be seen in Figure 14. The two most popular types of rentals offered at all six businesses were the Group G (premiums) and Group H (vans).
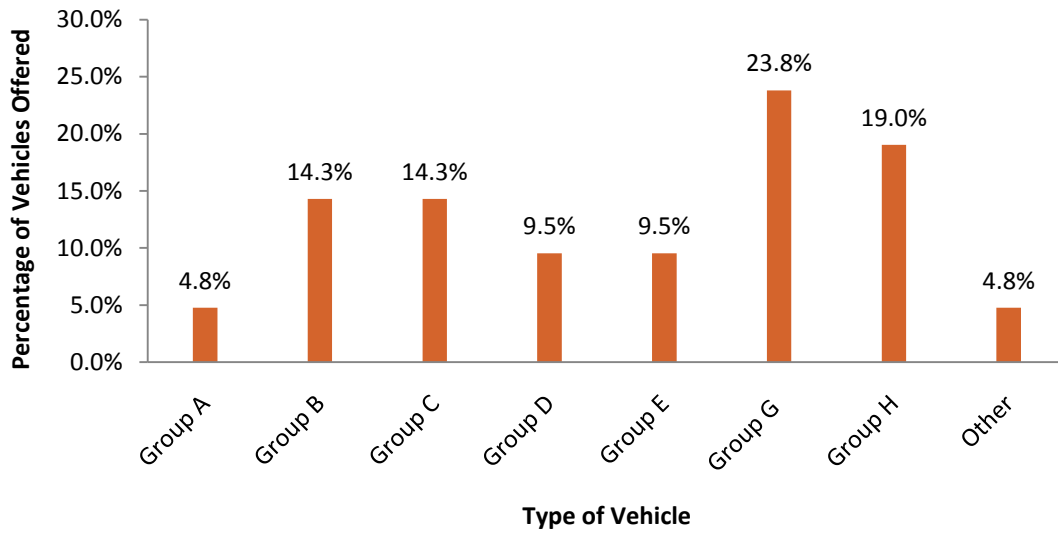
Figure 14: Types of Vehicles Offered

Along with the types of vehicles offered and average number of clients, the barometer also consists of the average number of billed days (9-12 and 13-16), the change in rack rates (an average increase of 1.2%), and four factors that influenced the rack rates: (1) gas prices (42.9%), (2) exchange rate (14.5%), (3) labor costs (14.3%), and (4) seasonality (14.3%). This information is displayed in a textual format next to the graphs.
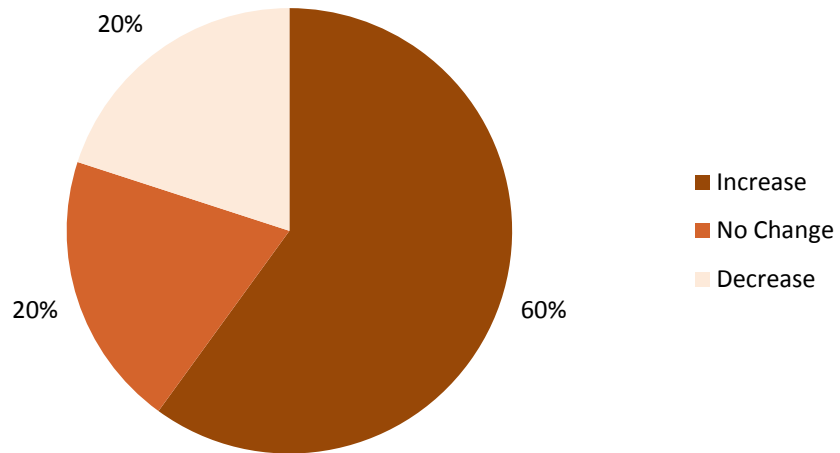
Figure 15: Vehicle Rental and Car Hire: Expected Change in Number of Clients: March-April 2008
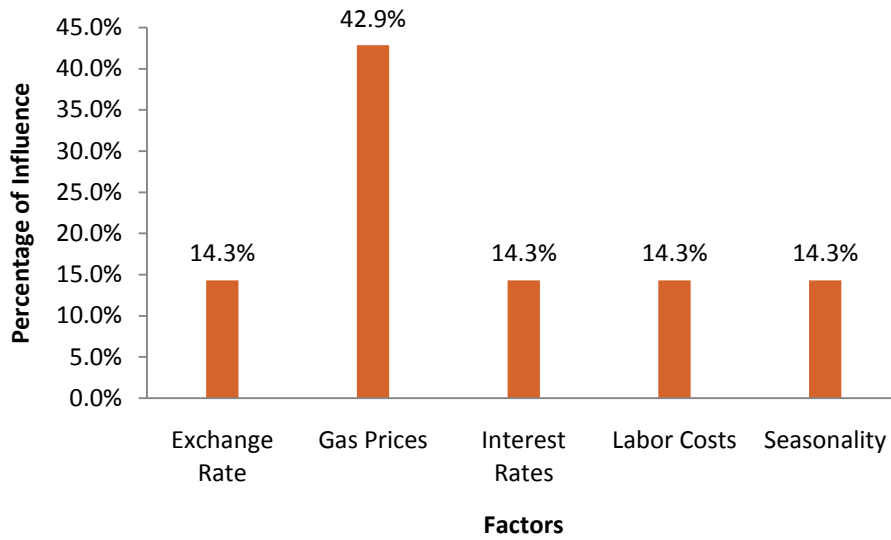
Figure 16: Vehicle Rental and Car Hire: Factors Influencing Rack Rates: Jan-Feb 2008

4.5.5 TROPHY HUNTING

The trophy hunting sector is displayed on page four of the barometer. The graphs that we included on this page were the factors influencing daily fees and trophy fees, the animals hunted during the months of February and March 2008, the expected change in the number of clients for April and May 2008, and the clients' country of present residence.

According to the seven respondents in Figure 17, there are many factors that influence both the daily fees and the trophy fees for the trophy hunting sector. The most prominent factors that influence both the daily fees and the trophy fees are gas and food prices. There are, however, some differences between the two. By juxtaposing the fees for daily rates and that of the trophy fees, there are more factors that affect the daily fees than the trophy fees. The factor that was noted affecting only the trophy fees was natural disasters, according to this graph. The exchange rate also affected the trophy fees more than the daily rates; whereas the other factors represented on the graph affected the daily rates more than the trophy fees.
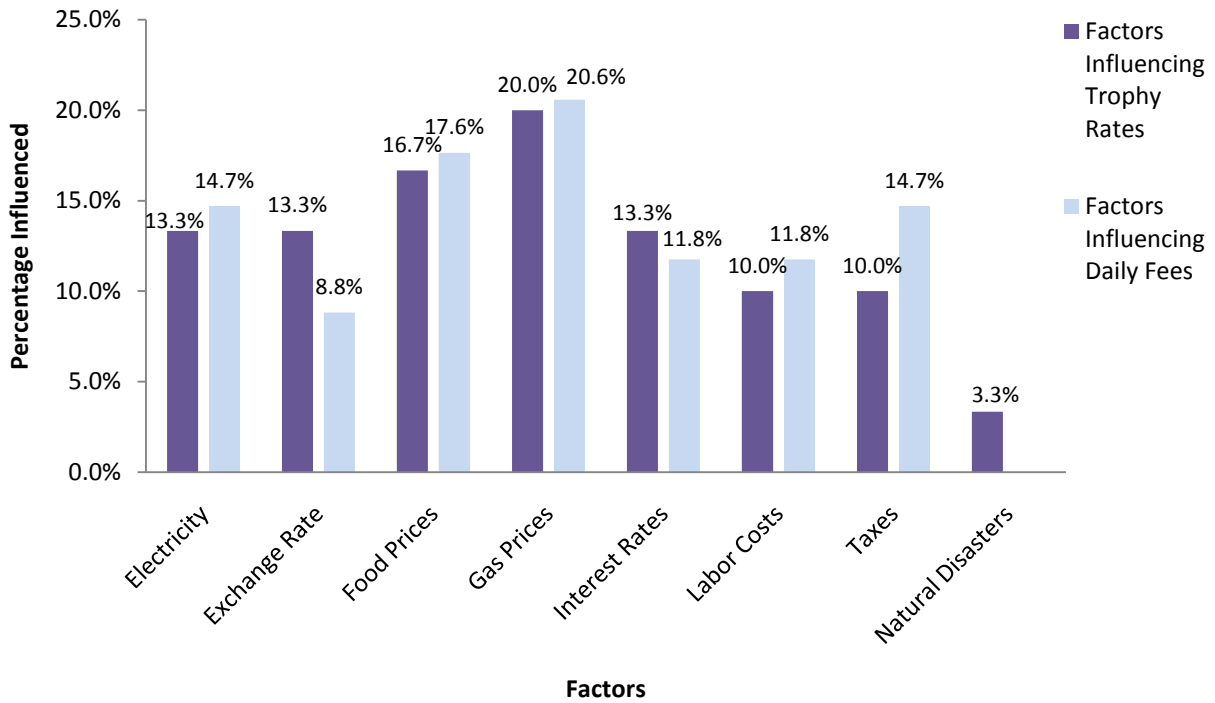
Figure 17: Factors Influencing Daily and Trophy Fees: Feb-Mar 2008

According to Figure 18, of the four businesses represented in this graph, 32.7% of the animals hunted for the months of February and March 2008 were the blesbok, oryx, and springbok (10.9% each); whereas 9.1% of animals hunted during February and March 2008 were the red hartebeest.
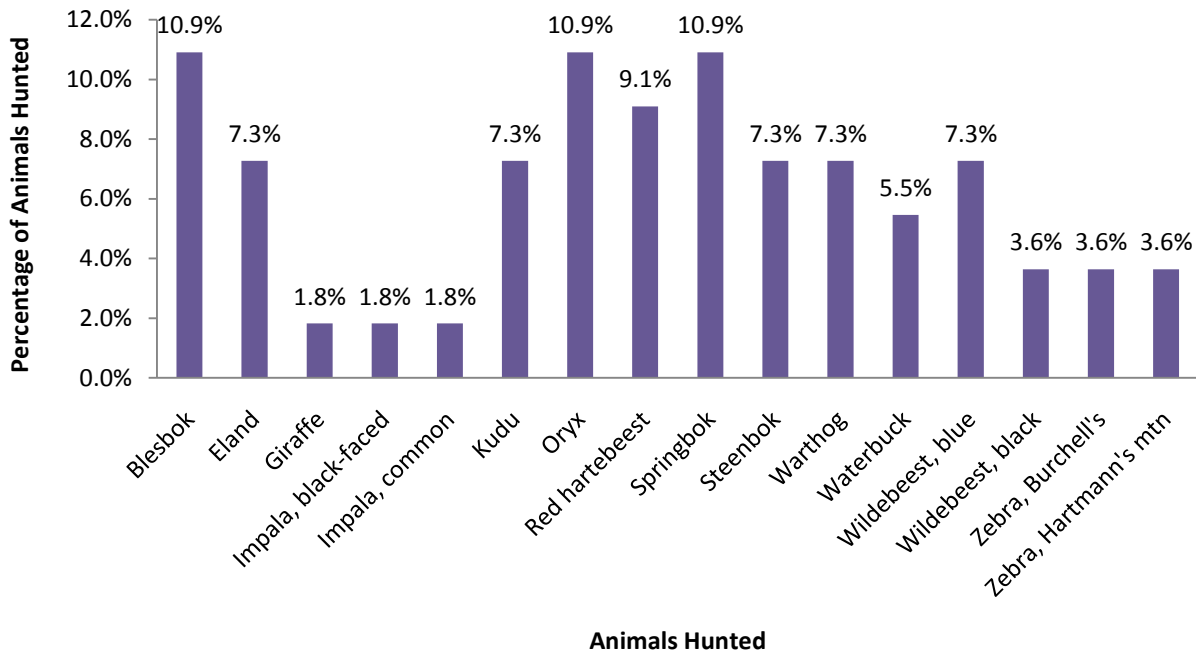
Figure 18: Animals Hunted: Feb-March 2008

Also included on the trophy hunting page in the barometer are two graphs representing the expected change in the number of clients in April and May 2008 and the clients' country of present residence. According to Figure 19, 43% of the seven respondents believe that there will be no change in the number of clients and 57% believe that there will be an increase in the number of clients. Figure 20, which shows the country of present residence for February and March, indicates that 33% of the clients were from Germany, Switzerland or Austria; 25% were from Portugal; and 42% were from the United States of America and Canada.
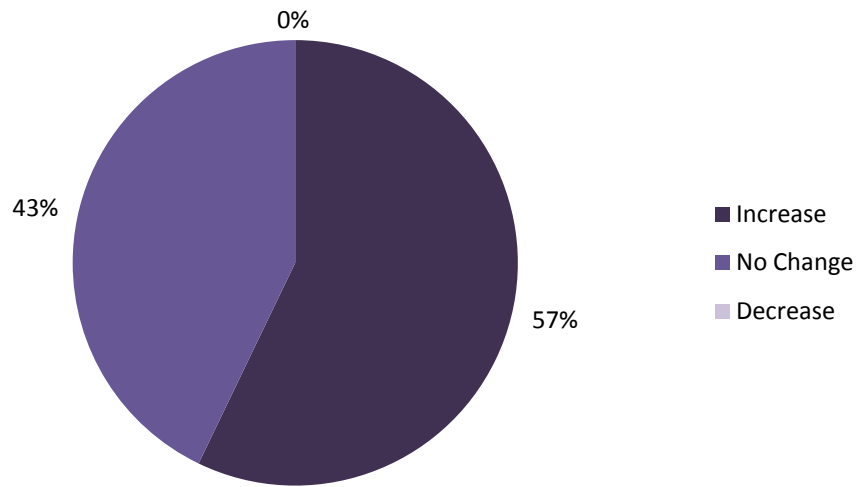
Figure 19: Trophy Hunting: Expected Change in Number of Clients: April-May 2008
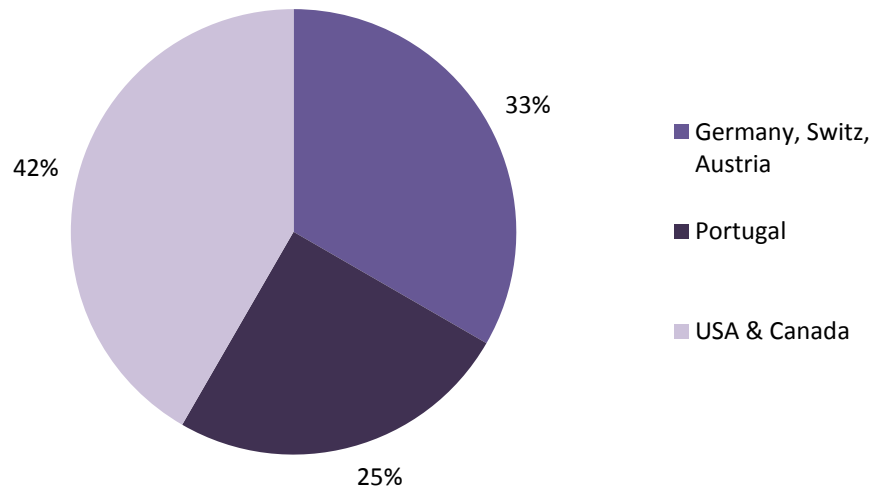
Figure 20: Trophy Hunting: Country of Present Residence: Feb-March 2008

There are also textboxes containing information relating to the changes in daily and trophy fees, as well as the top five markets to enter on the trophy hunting page of the barometer. Of the responses, the daily rates have increased at an average rate of 8.3% and the trophy fees have increased at an average rate of 7.6%. The top five markets that these businesses are hoping to enter include: (1) Russia, (2) Australia, (3) Canada, (4) Denmark, and (5) Europe.

4.5.6 BACK PAGE

The last page of the barometer includes information regarding upcoming holiday periods (school and national holidays) in other countries, which will enable stakeholders and business owners to prepare for a larger wave of tourists during these periods. Due to the large number of school and national holidays throughout the world, the barometer only includes the holiday periods for the Republic of South Africa, United States of America, United Kingdom, Germany, Italy, France, and Namibia. It is formatted as a three-month calendar layout, with this sample barometer including the months of April, May, and June 2008, which will change for each publication. The top five capital investments were originally intended to be included on this page of the barometer; however, it was later decided not to include them on this publication. After designing the barometer, we have established recommendations to set forth for the NTB to help them keep up with its maintenance and future improvements.

CHAPTER 5: CONCLUSIONS AND RECOMMENDATIONS

5.1 CONCLUSIONS

Tracking tourism performance on a short-term basis is imperative in order to gather accurate, statistical data pertaining to the tourism industry. With the use of the barometer that we have created, all the businesses and associations involved and interested in the tourism industry can assess their performance. The NTB, in turn, can make any necessary adjustments in business and marketing strategies through the data they collect. Having created four TDEFs, a database, and a prototype barometer, we can draw several conclusions based on the qualitative and quantitative results we have gathered. We have also arrived at recommendations we believe the NTB can implement in the future.

A short, concise format for the TDEF yields a greater response rate

The TDEFs were created separately for the four sectors, and the results were obtained to generate graphs for the barometer. In order to gather the necessary statistical data, we distributed and collected the TDEFs from all the registered companies. From the response rate of 8.0% for all four sectors, the tour & safari sector had the highest response rate and the vehicle rental sector had the lowest response rate. From the various interviews we conducted and comments we received from the TDEFs, we concluded that the companies were more apt to complete the TDEF if the questions were short, concise, and did not ask for data reporting on revenue or other sensitive information. They were also more receptive to help in our research when they were told how it would directly benefit their business.

A higher response rate for the TDEF requires a reminder E-mail to be sent out one week prior to the due date

For the accommodation and vehicle rental and car hire sectors, the response rate for the TDEF was not as high as anticipated. To improve the response rate, reminder E-mails needed to be sent to all businesses that had not responded by a particular date. Once these were sent, more TDEFs were received. However, businesses were more apt to fill out and send back the TDEF when it was first sent; the majority of the responses were received within only 3-5 days. This might have been because those who did not respond soon after they had received the TDEF either had forgot about it or had deleted it. By sending a reminder, some of the businesses that had yet to complete the TDEF were spurred into completing the form.

We created a data entry system through Microsoft Access 2007 that is user-friendly and can be updated every two months

We designed a user-friendly data entry system for the NTB to store and sort the information from the TDEFs. It takes very little time, approximately five to ten minutes per TDEF, to input the data from the form in to Microsoft Access. The database can also keep track of both current and past information, thus making it possible to obtain old records for the use in generating graphs of market trends over a long period of time and future prospects.

A six-page barometer was created because a small number of pages would not provide sufficient information for stakeholders

We decided to create a six-page barometer using Microsoft Publisher 2007 in order for the information from the four sectors to be presented comprehensively. We needed space to present the relevant information in a longer, less ambiguous format. By keeping the four sectors in one

document, the stakeholders will be able to view all the graphs at once and will also make it easier for the NTB when generating the barometer every two months. We also concluded that businesses were more apt to fill out the TDEF when it proved to be directly beneficial to their business, so we needed to include as much information as we could on the barometer.

5.2   RECOMMENDATIONS

The NTB can realistically publish a barometer every two months. This tourism barometer should measure the past and present trends within the four sectors including future prospects, market performance by sector, major capital investments by companies, as well as factors influencing market changes. While the initial publications of the barometer will not be able to track trends, future barometers will allow for the prediction of future trends, along with more precise line graphs. This proves that with every barometer publication, the barometer proves itself to be more useful to stakeholders and the participating businesses.

While our prototype barometer was based on a small number of sampled businesses, the following section outlines recommendations for the NTB on how to determine a final panel of businesses, implement the distribution and collection of the TDEFs, manage the database system, as well as create and present the barometer to a larger audience. This section suggests future improvements for reporting on Namibia's tourism industry through the barometer. Appendix M provides an outline summarizing the recommendations provided in this section.

5.2.1 DETERMINING AN APPROPRIATE REPRESENTATION OF BUSINESSES

In order to receive sufficient information from businesses, the NTB should establish which businesses will be included as part of the sample data for each publication. These participating businesses, otherwise known as the final panel, will supply the information for each of the four

sectors included in every two-month issue of the barometer. The *final* panel differs from the *trial* panel—the trial panel was used as our data sample for the prototype barometer. Determining an appropriate final panel is significant, as it will affect the validity of results reported in the barometer. It is very possible that the panel's members will change from publication to publication, since some businesses may choose not to fill out the TDEF every two months.

First, the NTB should capture the attention of all Namibian companies within the four sectors before the initial set of TDEFs are distributed. The purpose of this is to raise awareness of the tourism barometer. We recommend an initial E-mail be sent out to all companies in the four sectors outlining in detail the purpose of the TDEF and how the barometer will provide businesses with important information relating to market trends. Included in this E-mail should be a sample barometer, allowing businesses to see the wealth of information provided and how it can directly benefit them. Appendix N shows a proposed letter addressed to businesses within all the four sectors outlining the importance of the tourism barometer.

While an initial E-mail sent by the NTB will provide businesses within the four sectors with a general background, we recommend convincing HAN, TASA, NAPHA, CARAN and other relevant FENATA associations to promote awareness of the barometer as well. Even though these associations do not include every business in their corresponding sector, they are comprised of the most prominent businesses around the country. These associations hold meetings and provide regular E-mails notifications to their members. If HAN, TASA, NAPHA, and CARAN can provide their members with more information about the barometer, many of these businesses may be more willing to participate and provide data for the NTB.

After raising awareness of the barometer, the NTB needs to develop a large sample size through marketing incentives to generate a more valid barometer. From our results, after distributing the TDEF to all the registered businesses in the four sectors, we found that approximately 7.7% of each of the sectors submitted completed TDEFs through E-mail or fax. These low percentages were based on a voluntary willingness of businesses to fill out the prototype TDEF using our E-mail transcript (see Appendix O). Therefore, the NTB must develop strategies to provide incentives for companies to fill out and return the final TDEFs to raise this percentage level. These incentives are further explored in Section 5.2.5 as options to improve the level of participation.

There are two major options for the NTB to use when determining which businesses will make up the sample data provided in the barometer—developing a stratified random sample of all businesses or collecting as much information as possible from as many businesses as are willing to respond. While these two methods have advantages and disadvantages, we recommend collecting as many TDEFs as possible for the panel. Even though gathering as much data as possible may not be statistically practical, for the purpose of our barometer, it increases the chances that the published barometer will be representative of the four sectors. One reason is because the accommodation sector has sub-sectors such as bed & breakfasts, hotels, and camping sites (see Appendix E). Gathering as many responses as possible will ensure that these sub-sectors are properly represented in the barometer and certain sub-sectors are not left out. Additionally, the companies that fill out and return the TDEFs deserve to have their information in the barometer. Taking the time to fill out the form shows that participating companies are interested in seeing their data compiled in the barometer. This will make the companies feel included in the data sample, and will thus give them further incentive to complete the TDEF every two months.

The process of developing a stratified random sample would require certain businesses within each sector to be chosen at random to participate in completing the TDEF. However, since the TDEF is not mandatory, it is not guaranteed that these randomly chosen businesses will submit the TDEF. Therefore, sending out as many TDEFs as possible to every business in the four sectors will ensure a certain level of response, as shown from our results when determining the trial panel.

5.2.2 DISTRIBUTING AND COLLECTING THE TDEFS

The NTB should develop a systematic approach to distribute and collect the TDEFs. The TDEFs should be distributed in an organized fashion, as the forms will be sent out to hundreds of companies throughout Namibia. Therefore, it is essential to consider the method of communication (e.g. E-mail, fax, or mail) for the companies, as well as an appropriate time frame for filling out the forms. The NTB must also consider the methods of collecting and organizing the completed forms.

As part of our methodology, one of our initial tasks was to develop a TDEF Excel file as a method of collecting data from various companies. Our final TDEFs (see Appendix J) provide the NTB with an instrument for data collection, for both qualitative and quantitative data. Since the NTB aims to publish the barometer every two months, the TDEFs collect data representing the previous two-month period. Therefore, the TDEF will be distributed six times per year, starting 01 January. For example, a TDEF distributed on 01 January 2008 would collect data for November and December of 2007, while a TDEF distributed 01 March 2008 would collect data for January and February of 2008. Through our interviews, we learned that a period of two weeks was a sufficient amount of time to complete the form and return it, since many of the questions are easy to answer and quick to reference. Thus, the due dates for the TDEFs should be two weeks after they are distributed, or the 15th of every January, March, May, July, September, and November.

Additionally, it is important to recognize the season for trophy hunting. Since trophy hunting can not legally operate during the months of December and January, the trophy hunting TDEF must specify that data collected from the January form will include data from November only (not December), while the form sent out in March will only include data from February (not January).

While there are many options available for distributing the forms, through our interviews with businesses and associations, we discovered that E-mail is the most efficient way to send the TDEFs to the companies. According to the NTB's database, nearly 80% of all trophy hunting operators have an E-mail address, along with 93% of tour & safari operators, 94% of vehicle rental operators, and 76% of accommodation establishments. Due to the large number of tourism businesses provided in the NTB's database, E-mail would be the cheapest, fastest, and easiest way of distribution. Due to this, we also recommend omitting companies without E-mail access from the panel. The excluded businesses consist of companies with only fax and/or ground mail communication. Even though fax is a fairly common form of communication in Namibia, sending out individual faxes to various companies around Namibia would be time-consuming and expensive. E-mail distribution of the TDEFs will allow the NTB to receive timely responses from companies, reducing the risk of having to wait for a company's information, and thus delaying the production of the barometer.

When considering the distribution of the TDEF, we also recommend the development of an E-mail list for each of the four sectors. By creating an E-mail alias for each sector, the NTB would only have to enter four E-mail addresses when distributing the TDEFs every two months. New companies or businesses no longer operating could easily be added or removed from their sector lists. Additionally, we discovered that some companies are either no longer operating as businesses

or their E-mail addresses are incorrect. Therefore, the NTB will need to update the E-mail addresses of all registered businesses before sending out the initial TDEFs.

Upon distributing the TDEFs to the businesses, the NTB should implement a method to collect all the information from the completed forms. After distribution, it is important to provide a reminder E-mail to companies after one week. This E-mail would be an automated message sent out to businesses through the four E-mail aliases, providing them with a reminder that the completed TDEF must be submitted by the 15th of the month. Any form submitted past the 15th would not be included as part of the final panel for the upcoming barometer publication.

After receiving the return E-mails from companies, the attached TDEF Excel files should be downloaded and saved in a specific location. Through our research, we found that some companies did not properly send back the TDEF as an attachment. Therefore, the NTB should attempt to make it clear that companies should download the blank TDEF, fill out the information, and then send the completed form back to the NTB as an attachment. The companies that do not have access to Microsoft Excel would not complete the TDEF. However, it is safe to assume that the majority of companies with E-mail would have Microsoft Excel, since many companies use Excel to track their finances.

Table 13 provides a suggested time table for distributing and collecting the TDEFs. The table shows the six cycles of data collection during a year, along with the distribution and due dates of the TDEFs, and the barometer publication dates.

Table 13: Recommended Time Table for TDEF Distribution and Collection

Cycle	Marking Period	Distribution Date	Reminder E-mail	Due Date	Barometer Published
1	Nov. & Dec.[*]	01 January	08 January	15 January	28 February
2	Jan. & Feb.	01 March	08 March	15 March	30 April
3	March & April	01 May	08 May	15 May	30 June
4	May & June	01 July	08 July	15 July	31 August
5	July & August	01 September	08 September	15 September	31 October
6	Sept. & Oct.	01 November	08 November	15 November	31 December

5.2.3 MANAGING THE DATABASE SYSTEM

In order for the NTB to effectively store data from companies within the four sectors, they should use a Microsoft Access database. With a continuous influx of tourism data from the TDEFs, we developed a database system for storing data that can then be used to output data for creating graphs and charts to be included in the barometer. Because the database system that we developed was a simple initial working model, many different tables, queries, forms, etc., can be further developed by an experienced database professional. A refined database would create a more efficient system, thus allowing for a more comprehensive collection of data without exceeding the limits and capabilities of the program. A database specialist can integrate this newly developed system into the existing NTB database used for the accommodation levy. With a unified system, information from TDEFs and levy forms can both be used to develop graphs for the barometer.

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[*] The first issue of the barometer every year will contain data from November and December of the previous year.

It is important to note how long each step in the process will take. Assuming each TDEF would take five minutes to enter into the database, and 80 forms were collected per two month period, total data entry would require approximately 6 hours and 40 minutes. Therefore, the estimated time required to input every form per two month period should not exceed eight hours for someone who is experienced, or 12 hours for a novice. Although this may vary once the current databases are combined, one could still expect a trained staff person to enter all TDEF data within a two day time period, if our estimation of the TDEF response rate is correct. Appendix P provides a step-by-step checklist of procedures when using the database.

5.2.4 CREATING AND DISTRIBUTING THE BAROMETER

After storing the information from the TDEFs in the Microsoft Access database, the NTB should create and distribute the tourism barometer. In order for companies to be responsive to the barometer, it must be presented in a reasonable fashion, with an appealing mix of graphs and text, along with pertinent information relating to market trends. Additionally, the barometer ought to be distributed by the NTB in an organized and efficient fashion, such as online or through E-mail. With these methods in mind, the NTB can successfully publish an informative barometer every two months.

Through interviews with stakeholders, we learned that a short, concise barometer with only the most important information displayed would be the most beneficial. Therefore, we recommend that the barometer remain as concise as possible, with only the most important data displayed. The presentation of data should be split up into information that covers all four sectors and information on each individual sector. The graphs covering all four sectors should show the average number of clients and the country of present residence of guests for each marking period. Once enough months

of data have been collected, a line graph should be used to display the changes in each indicator over longer time periods.

For the accommodation sector, there should be a graph for the average number of clients based on the type of visit, factors influencing rack rates, as well as two text boxes describing the fluctuations in rack rates and changes in the number of clients. Line graphs can also be added to this sector to show trends from year to year. The tour & safari page in the barometer should display pie graphs for the average length of the trip and percentages for the types of tours given. Factors influencing the rack rates should also be displayed in a bar graph with a text box explaining the percentage it has changed compared with the previous year. For the vehicle rental sector, the page should display a bar graph showing the types of vehicles rented as well as a text box showing the average billed days, percentage change in the rack rates, and the factors influencing the rack rates. Finally, the trophy hunting sector should include text boxes describing the percentage change in daily and trophy fees, bar graphs displaying the factors influencing daily fees and trophy fees, and a bar graph for the animals hunted for the months of the marking period. For the graph of the animals hunted, only the animals that were killed should be included on the graph to save space; this will make the graph less confusing.

In addition to the graphs and text boxes included in the barometer, the back page should also contain useful information for stakeholders and businesses. There should be a list of upcoming holidays of key countries for the following four months (e.g. if the barometer is for the marking period of January – February, then the listed holidays should be for the months of April – July). There should be a section in the database with the holidays for the selected countries that will be updated automatically for each barometer. The top five markets that businesses wish to enter along with the top five capital investments for that marking period will also be included on the back page.

If businesses or stakeholders find that this information is not helpful, this information may be altered to better suit the industry and provide more useful information.

When considering the distribution of the barometer, it is essential to decide exactly who will receive the published barometer. In order to gain an increased level of TDEF responses, we recommend providing the barometer only to companies who submit a TDEF and to relevant stakeholders, such as the ones listed in Tables 6 and 7. By limiting the publication to companies who respond, other companies may eventually hear the benefits of submitting a TDEF to receive a barometer, thus increasing the overall response rate. Stakeholders, such as businesses not in the four sectors and related associations, should always receive the barometer, even though they are not required to fill out a TDEF.

The most practical method of distribution is through E-mail. This method of distribution would require the NTB to develop additional E-mail aliases. Since stakeholders will be receiving the barometer every two months, the NTB should develop an alias for each of the four major stakeholder categories, as seen in Tables 6 and 7. The stakeholder aliases could be easily updated if the NTB chooses to include additional companies or organizations on their stakeholder list. Additionally, the NTB would need to develop an E-mail alias to distribute the barometer to the participating companies. Assuming an approximately 10% response rate from the four major sectors, this is approximately 87 businesses. Since the database would show which companies participated, along with their contact information, the NTB could quickly update a "panel alias" by copying the E-mail addresses from the TDEF database. While there are other methods of ensuring the barometer is fairly distributed, such as a password protected online distribution, methods such as this are expensive, time consuming, and demand a high level of computing expertise. Appendix Q provides a step-by-step checklist of procedures when updating the barometer every two months.

5.2.5 FUTURE IMPROVEMENTS AND OTHER RECOMMENDATIONS

We have focused our research on revising the TDEFs, developing a prototype database, and producing a prototype barometer. The NTB will need to refine the prototypes further to produce a final product. In order for the NTB to develop the barometer and improve its validity, there are several factors to consider, such as increasing the level of participation among businesses, integrating other tourism sectors into the barometer, and combining the TDEF information with the accommodation levy forms. The ideas outlined below will help the NTB to make future improvements in Namibia's tourism barometer.

For the NTB to produce an accurate representation of data from the four sectors, there must be a significantly high level of responses from companies filling out the TDEFs. There are several ways to provide companies with the motivation to participate in this process. One method is to limit the distribution of the barometer only to companies willing to participate in the data collection process. By doing this, companies that provided data to the NTB (the final panel) would have direct access to the barometer and would clearly see what benefits their participation can provide their business. The companies who refuse to fill out a TDEF would not have access to the barometer report. There is also the option of limiting distribution to stakeholders and the panel for the first year the barometer is released. After one year, the barometer would be released to the public. The advantage of this is that the barometer would gain more publicity. However, the disadvantage is that companies may lose incentive to participate if every company is receiving the barometer, having completed the TDEF or not.

Another strategy of increasing the participation of companies would be to provide free advertising, or other forms of individual business marketing in the barometer. If the barometer were

to provide free advertising in every issue, companies would see this as an incentive to fill out the form in order to have their company included somewhere on the barometer. It is important, however, to consider the amount of available space on the barometer. Another option would be to incorporate free advertising on the NTB's website for the participating businesses, allowing more room than the six page barometer. Additionally, a future version of the barometer could include a section entitled "The Top 5 Growing Tourism Businesses", giving a brief summary of each business. This section would only include businesses that sent in a TDEF to the NTB.

In order to gain a more comprehensive representation of Namibia's tourism trends, the NTB should integrate other sectors of tourism into the barometer. While the current barometer focuses on four main tourism sectors—accommodation, tour & safari, vehicle rental & car hire, and trophy hunting, there are other sectors influencing tourism in Namibia. These other sectors, such as air-charter operators, booking agents, conference center operators, and shuttle & transportation service operators, have a significant impact on tourism. Many of these operators deal with clients from various countries and would be able to provide the NTB with accurate data on the country of present residence of clients, as well as other statistical and qualitative information.

As the NTB moves toward developing a new levy system for all the sectors of tourism, the NTB will therefore create levy forms for each of the sectors to fill out. If these levy forms contain information relevant to the barometer, then the forms can act as a supplement to the TDEF. Currently, the NTB uses an accommodation levy form every two months. It tracks indicators, such as the number of guests and nationality of clients. If the new system is implemented, every NTB registered business would be required to fill out the levy form, allowing the NTB to collect large amounts of data from relevant tourism sectors to include in the barometer.

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APPENDIX A: THE NAMIBIA TOURISM BOARD

Our sponsor, the Namibia Tourism Board (NTB), was formed in 2001 to develop travel to and within Namibia. According to the NTB's website, its main objectives are to:

1. Promote Namibia's tourism industry – internationally and locally;
2. Ensure that services rendered and facilities provided to tourists comply with the prescribed standards;
3. Register and grade accommodation establishments and other tourism-related businesses;
4. Promote the training of persons engaged in the tourism industry;
5. Promote the development of environmentally sustainable tourism; and
6. Provide advice and guidance to persons engaged in the tourism industry.

The NTB achieves their objectives through various plans, such as marketing; standards and quality assurance; finance and administration; and tourism skills development. The marketing plan of the NTB is to market Namibia as a tourist destination. While individual companies can promote their services, the NTB maintains its commitment to advertise tourism for the entire country of Namibia. The standards and quality assurance plan recognizes the responsibility to maintain Namibia's tourism products at a standard international level, aiming to compete with other country's quality standards. Meanwhile, the finance and administration aspect of the NTB ensures proper funds are being distributed to the proper projects and activities within the organization. Finally, the tourism skills development plan looks to further develop Namibia's understanding of tourism by employing qualified workers in the tourism industry and encouraging locals to work for the tourism sector. In addition to NTB maintaining its short-term goals, its long-term priority is to

further develop tourism industry in Namibia as the primary creator of job opportunities in the country by 2010.

The NTB is run by a Board of Directors, including one representative from each of the following—the Ministry of Environment & Tourism, Ministry of Finance, and Ministry of Trade & Industry, in addition to two representatives from the private sectors relating to tourism (Namibia Tourism Board, 2008). The NTB maintains four satellite offices in Frankfurt, Cape Town, London, and Johannesburg, all providing extensive information on Namibian tourism to potential travelers and promote Namibia internationally.

APPENDIX B: THE INTERDISCIPLINARY QUALIFYING PROJECT (IQP)

The Interdisciplinary Qualifying Project (IQP) is one of three major projects required for undergraduate degree completion at Worcester Polytechnic Institute. The IQP is designed to give students an opportunity to work in groups—which are comprised of students from various majors— and learn how to research, develop, and ultimately formulate a project proposal. Projects are sited overseas such as Namibia, Australia, and Italy or nationwide such as Washington D.C., Boston, and Worcester; but all of the projects have one common goal, which is to implement a plan of action to improve a societal problem. After seven weeks of arduous preparation, students reach the project site and begin to carry out the project for another seven weeks on-site with the help of the advisor and a sponsoring agency. It is through the works of these students that a problem, which may not have a simple solution, can be solved.

This specific project, which deals with tracking tourism performance in Namibia, constitutes as an Interdisciplinary Qualifying Project. The team consists of students interested in diverse areas of study: biology & biotechnology, mechanical engineering, chemical engineering, and civil engineering. With the direction of the Namibia Tourism Board, the team is able to help Namibia in its efforts to establish and implement a tracking system that will inform the stakeholders of key information. The project-based curriculum WPI provides is a great experience before entering the workforce, has enabled the students to learn about themselves, each other, and especially how to construct a project proposal in a working team environment.

Demand Side Accounts

N$ mn

PERSONAL TRAVEL & TOURISM 2,529.2

More formally known as Travel & Tourism Personal Consumption, this category includes all personal spending by an economy's residents on Travel & Tourism services (lodging, transportation, entertainment, meals, financial services, etc) and goods (durable and nondurable) used for Travel & Tourism activities. Spending may occur before, during or after a trip. Spending covers all Travel & Tourism, outbound and domestic.

BUSINESS TRAVEL 561.6

Formally know as Intermediate Consumption of Travel & Tourism or more simply business travel, this category of expenditures by government and industry includes spending on goods and services (transportation, accommodation, meals, entertainment, etc) for employee business travel purposes.

GOVERNMENT EXPENDITURES (INDIVIDUAL) 13.2

Formally known as Non-Market Services (Individual), this category includes expenditures (transfers or subsidies) made by government agencies to provide Travel & Tourism services such as cultural (eg. art museums), recreational (eg national park) or clearance (eg immigration/ customs) etc to visitors.

VISITOR EXPORTS 4,192.3

Expenditures by international visitors on goods and services within the resident economy.

TRAVEL & TOURISM CONSUMPTION

Total Travel & Tourism expenditures made by and on behalf of visitors (goods and services) in the resident economy

7,296.3

GOVERNMENT EXPENDITURES (COLLECTIVE) 284.9

Formally known as Non-Market Services (Collective), this category includes operating expenditures made by government agencies on services associated with Travel & Tourism, but not directly linked to any individual visitor, instead these expenditures are generally made on behalf of the 'community at large', such as tourism promotion, aviation administration, security services and resort area sanitation services, etc.

CAPITAL INVESTMENT 1,312.0

Formally known as Capital Formation, this category includes capital expenditures by direct Travel & Tourism industry service providers and government agencies to provide facilities, equipment and infrastructure to visitors.

EXPORTS (NON-VISITOR) 225.8

Consumer goods (such as clothing, electronics or petrol) exported for ultimate sale to visitors, or Capital goods (such as aircraft or cruise ships) exported for use by Travel & Tourism industry providers.

TRAVEL & TOURISM DEMAND

The nominal aggregate of tourism activity in the resident economy

9,118.9

90

The Travel & Tourism Satellite Account is based on a 'demand–side' concept of economic activity, because the industry does not produce or supply a homogeneous product or service like traditional industries (agriculture, electronics, steel, etc). Instead, Travel & Tourism is an industrial activity defined by the diverse collection of products (durables and non-durables) and services (transportation, accommodation, food and beverage, entertainment, government services, etc) that are delivered to visitors. There are two basic aggregates of demand (Travel & Tourism Consumption and Total Demand) and by employing input/output modelling separately (blue/green arrows) to these two aggregates the Satellite Account is able to produce two different and complementary aggregates of Travel & Tourism Supply: the Travel & Tourism Industry and the Travel & Tourism Economy. The former captures the explicitly defined production-side 'industry' contribution (ie direct impact only), for comparison with all other industries, while the latter captures the broader 'economy–wide' impact, direct and indirect, of Travel & Tourism.

Supply Side Accounts

N$ mn

TRAVEL & TOURISM INDUSTRY SUPPLY

Total Travel & Tourism Industry supply

1,584.2 — TRAVEL & TOURISM INDUSTRY GDP (DIRECT)

'000s of Jobs 18.8 — Direct Gross Domestic Product (also know as Value-Added) and Employment associated with Travel & Tourism Consumption. This is the explicitly defined Supply-side industry contribution of Travel & Tourism that can be compared one-for-one with the GDP and Employment contribution of other industries in the economy. Establishments in this category include traditional Travel & Tourism providers such as airlines, hotels, car rental companies, etc.

3,723.9 — TRAVEL & TOURISM INDUSTRY GDP (INDIRECT)

Indirect Gross Domestic Product associated with Travel & Tourism Consumption. This is the upstream resident economy contribution which comes about from suppliers to the traditional Travel & Tourism industry. Establishments in this category include fuel and catering companies, laundry services, accounting firms, etc.

1,988.2 — TRAVEL & TOURISM INDUSTRY IMPORTS

The value of goods imported by direct and indirect Travel & Tourism Industry establishments.

7,296.3

TRAVEL & TOURISM ECONOMY SUPPLY

Total Travel & Tourism Economy supply

6,788.6 — TRAVEL & TOURISM ECONOMY GDP (DIRECT AND INDIRECT)

'000s of Jobs 71.8 — Direct and Indirect Gross Domestic Product (also know as Value-Added) and Employment associated with Travel & Tourism Demand. This is the broadest measure of Travel & Tourism's contribution to the resident economy. Establishments in this category include those described above as well as manufacturing, construction, government, etc that are associated with Capital Investment, Government Services and Non-Visitor Exports.

2,330.3 — TRAVEL & TOURISM ECONOMY IMPORTS

The value of goods imported by direct and indirect Travel & Tourism Economy establishments.

9,118.9

91

The following is a list of the types of accommodation establishments and their corresponding definition. The definitions are based upon the Namibia Tourism Board's interpretation, provided from 2008 version of *The Official Namibian Tourism Directory*.

Backpacker Hostels

Backpacker hostels offer affordable accommodations for travelers. Guests often have the option of staying in an individual room or staying in a large room with many beds.

Campsites

These establishments offer designated camping areas for the pitching of tents, awnings or other temporary structures by guests for dwelling or sleeping purposes. Ablution facilities and fireplaces are provided for use by guests, and water is supplied either free of charge or on payment.

Camping and Caravan Parks

Camping and caravan parks allow for guests to camp, as well as set up caravans in designated locations.

Guest Farms

A guest farm is located on a farm. Recreational facilities such as game drives are provided to guests. The establishment comprises at least five guestrooms with en-suite or communal bathroom facilities. It provides meals to guests, or food for them to prepare meals on the premises.

Guest Houses

A guesthouse (or motel) provides accommodation and at least breakfast facilities, and comprises at least five guestrooms with en-suite or communal bathroom facilities.

Hotels

A hotel is comprised of at least 20 en-suite bedrooms.

Hotel Pensions

A hotel pension is Comprised of at least 10, but not more than 20 en-suite bedrooms.

Lodges

A lodge is located in a rural or other area within a natural environment where recreation facilities are offered. It comprises at least five bedrooms, has a dining room or restaurant, and provides recreational

facilities such as game drives, a health spa or other similar facilities.

Resorts

Resorts are more often upscale accommodations for travelers seeking luxurious settings. Resorts provide a wide range of services, such as food, drink, and entertainment.

Rest Camps

Rest camps offer a wide range of accommodations, such as bungalows and camp and or/caravan sites.

Self Catering Establishments

A self catering establishment allows guests to provide themselves with the necessities they need. These establishments resemble an apartment or condo, where a guest can cook for themselves.

Permanent Tented Camps & Tented Lodges

A permanent tented camps or a tented lodge are permanent tents or other structures with walls of canvas or wood, reeds, grass or other natural material, and may include camping sites or caravan pitches. They must have at least four accommodation units, excluding camping sites and caravan pitches, and a dining room or restaurant.

Rest Camps

A rest camp provides accommodation primarily in rooms, rondavels, bungalows, chattels or other units, and may include camping sites or caravan pitches.

Interviewer	Transcriber	Person being Interviewed	Contact Information	Company	Type of Interview	Date of Interview
All	Allison, Amanda, Craig	Jacqueline W Asheeke	+264 61 23 0337	FENATA: CEO	In Person	12-Mar-08
Chris, Amanda	Allison, Craig	Shareen Thude	+264 61 290 6002	NTB: Strategic Executive Marketing and Research	In Person	13-Mar-08
Craig	Chris, Allison, Amanda	Gitta Paetzold	+264 61 22 2904	HAN	In Person	14-Mar-08
Amanda	Chris, Allison, Craig	Gielie van Zyl		B -Mobile, CARAN Vice Chair, former Avis	In Person	14-Mar-08
Allison	Chris, Amanda, Craig	Ms. Almut Kronsbein	+264 61 23 4455	NAPHA: CEO FENATA: VP	In Person	14-Mar-08
Allison	Chris, Amanda, Craig	Lesley Tjiramba	+264 61 23 6045	NTB: Database	In Person	18-Mar-08
Craig	Chris, Allison, Amanda	Martin Britz	Set Up by Liaison	Ministry of Environment and Tourism	In Person	20-Mar-08
Chris	Amanda, Craig	Ronalda Jansen	Set Up by Liaison	Ministry of Environment and Tourism	In Person	26-Mar-08
Tai	Allison, Craig, Amanda	Paul Egelser	Paul.Egelser@bon.com.na	Bank of Namibia	In Person	27-Mar-08
Amanda	Allison, Craig	Martin Wiemers	Martin.wiemers@springbokatlas.com	Springbok Atlas	In Person	28-Mar-08
Tai	Chris, Allison, Amanda, Craig	Thinus Blaauw	info@crisscross.com.na	CrissCross Namibia Safaris	In Person	28-Mar-08
Chris	Tai	Abdullah Ismael	+264 61 252 298	Kea Campers/Dollar Thrifty Car Rentals	In Person	31-Mar-08

Key
All Sectors
Accommodations
Car Rental

Interview with Ashley Dassatti

- ▪ **Enterprise Rent-A-Car**

- ▪ **Management Training Program**

Conducted via telephone on 06 February 2008

Interviewer: Allison Dassatti

NTB

APPENDIX G: INTERVIEWS CONDUCTED

1. **What are the different types of rentals?**
   There are 5 rental types:
   - Retail; tourists, people on vacation or traveling somewhere to vacation
   - Corporate; any large number of people, example: Burton Snowboards. They will get a specific rate and discount
   - Insurance; they bill insurance company if there is an accident
   - Dealership rentals; if the dealership makes a mistake or take too long
   - Body shop; not very common-if someone doesn't have the insurance or insurance doesn't cover

2. **Are there a lot of tourists that rent cars?**
   No, not at our location. Tourists are more prominent at the airports.

3. **How do you track the car rentals of the various types of rentals?**
   We have a computer system that tracks it. It is branch specific (location of store). It will tell us, for example, how many times Burton Snowboards Company rents. We can call them up if they haven't been here in a while and make sure that everything is fine.

4. **What software do you use?**
   It is called RALPH 1.0 and 2.0. 1.0 is the older version and 2.0 is the new system.

5. **How often is the information updated?**
   It's always being updated. We add new information daily.

6. **Do you have reports?**

We have a daily report and a monthly report. The daily report will tell us what was rented for that entire day, including revenue and the cars that weren't rented out that day. We also have a 30 day report that shows the revenue for that month, and also the number of cars rented and type of rental.

7. **What information is included in your computer system?**
Name, driver's license number, credit cards information, birthday, when renting, when returning, what type of car, and type of rental. It breaks it down by the type of rental; this is the main sorter.

1. **How do you prefer to be addressed?**
   Sophia

2. **How did you get involved/ interested in the tourism industry?**
   My family was involved with tourism and after I finished school, I worked for the Ministry of Environment & Tourism for nine years. I have been working for the Namibia Tourism Board for the past two years.

3. **What are your duties?**
   My job is in the Research and Statistics department where I ensure that the NTB is gathering relevant information pertaining to tourism.

4. **How long have you been working with the NTB?**
   Two years

5. **In terms of working with WPI students on past projects,**
   a. **How helpful were their reports?**
      My first WPI group was last year and we had a very good experience. Their project was very helpful and gave the NTB insight into what we could do to improve.

   b. **How do you define a successful project?**
      A successful project would be one that I could continue, after the term was over, by implementing your proposed process.

6. **What is our workspace like?**
   There is a new office building that has room for four people, but five can fit. You will have access to the databases as well as the internet.

7. **What computer software does the NTB have available to use?**
   We all work on Microsoft office for word processing. Our Accounting system is in ACCPAC, the database is running on SQUAL server, database is designed with visual basics and reports with Crystal report writer. Please bring along your notebooks - we do not have extra computers. Access to internet will be provided.

8. **What is SQUAL and how does the NTB specifically use it?**
   See above

9. **How is the NTB connected to the government? Are we going to be able to access any government documents?**
We are a parastatal, reporting to the Ministry of Environment and Tourism (see attached fact sheet containing more info about NTB). To some documents, you will have access depending on confidentiality.

10. **How many departments are there in the NTB, and are you a non-profit or profit organization?**
See attached organizational structure

11. **How specific do you want our group to be when identifying the stakeholders?**
Only the broad groups of different stakeholders - do not have to go as far as names of persons.

12. **Are there any specific timelines that you need us to abide by, both here and when we arrive to Namibia?**
I would like to see your final project proposal before arrival, so that we can provide input regarding practical and logistical issues. What may seem practical in other situations might not be feasible in our environment. I would like to have the final results before you leave Namibia in April/May.

13. **Lastly, how would you describe your past experience with WPI students?**
We had a wonderful experience with the previous group (very disciplined) and look forward to meeting you all.

Notes:
- She would like to see the proposal two weeks before we arrive in order to have input on whether we are headed in the right direction.

- Travel will be provided for us in order to interview different businesses that are in Windhoek. We will just have to let her know a day in advance.

- English is spoken by everyone and should not pose a problem.

- We are welcome to send questions to her and ask specific questions on Namibia if we have any.

- Mentioned the Scottish Tourism Board and the WTO.

- Namibia Tourism Board
- Head of Research & Statistics

Conducted in person on 27 February 2008

Interviewer: Christopher Cheu, Allison Dassatti, Amanda DeBaie, Craig DiGiovanni, and Tahiyyah Muhammad

1. **For stakeholders, I realize that there is a misunderstanding on our part in terms of what a stakeholder is. Now that we have a better understanding of what it means, we use the groupings listed under the NTB website for example, Government and Ministry, Travel-related Associations, Conservation & Environmental organizations and Financial Institutions.**
   a. Is that correct? Are the indicators within each group correct?
   They sound good. At this point, it is not crucial; we just need an idea. There may be one or two more, or we may decide to group a couple of them together.

2. **How does NTB's database work and what is a registration number?**
   Everything entered through the NTB has a registration number (ex: THO #), so one can easily recognize the business according to its registration number. NTB has a database that you are welcome to use; however, I think the group is welcome to create their own small database for the purposes of the project, if they like, and your proposed database can later be integrated with NTB's main database.

1. **How long have you worked in the tourism industry?**
   I have worked as a lobbyist in DC, worked in the tourism industry in Germany for 6 years and then the tourism industry in Namibia for the past 5 years.

2. **How long have you worked for FENATA?**
   5 years

3. **What is the relationship between FENATA and the NTB?**
   a. **How do they differ?**
      They are a private sector federation, whereas the NTB is a government sanctioned body. Their members are comprised of the associations, so they serve as the 'umbrella' for all the sectors. FENATA contains 11 federations that track statistics for around 1,400 associations.

   b. **How do they work together?**
      NTB is the regulator, so they are bound at the hip to the FENATA. They have to work together in order to get things done. With the new labor act in place, the two are working together to resolve some of the problems associated with this new act.

4. **We are trying to figure out what the most important indicators are for each sector in order to track and measure tourism performance. (add/ remove current indicators)**
   For the accommodation sector, the indicator for the type of guest may be hard to receive data on because they may not ask the guest that specific question. Also, many of the types of vehicles in the car hire TDEF must be changed, as Namibians do not use terminology such as "pick-up truck" or "SUV".

   a. **What do you consider the most important quantitative indicators for the four sectors that we are focusing on?**
      Anything that they would know off the top of their head and that they would not have to look up.

   b. **What do you consider the most important qualitative indicators for the four sectors that we are focusing on?**
      Same as above.

5. **Does your association measure tourism?**
   FENATA does not directly measure tourism. They rely on their associations (e.g., HAN, NAPHA) to provide information on tracking their specific sector.
   a. **How does it measure?**
   See above.

6. **Does your association use a database?**
   It isn't our job to make or input information into databases. Associations will input their data and they (FENATA) will then have access to it.
   a. **If so, which one?**
   We are actually making a database because the NTB isn't ready at this time and we need to get it moving. It's a database of all the tour guides. We will be using Microsoft Access.

   b. **Do you find this useful?**
   See above.

7. **Look at TDEFs**
   a. **What questions would you consider sensitive or unlikely to receive answers?**
   Anything that they will have to look up would be unlikely to receive an answer. The trophy hunting sector is being audited right now, so you may find it difficult to gather information from these businesses. In terms of the type of vehicles, some of the options need to be changed/modified/removed because they either don't exist here, or they are called something else.

   b. **Do you have any suggestions of better questions to include?**
   Keep in mind that there are different types of safaris that may generate very different data, such as niche versus wilderness safaris.

8. **For our project, we will be creating a barometer containing information we collect from each of the four sectors.**
   a. **Do you have any suggestions on how we should organize the barometer for each sector?**
   Keep it short, not more than a page. People will want something that they can read quickly, don't have to scroll down to read, no printing required, not too wordy, and it has to be easy to understand. You should combine all of the sectors into one barometer so we can send it out to everyone. I suggest that you also divide it up, i.e., one week have it featuring two sectors, and the next week with the other two sectors.

   b. **What information is important for each sector?**
   Write what they want to hear, not what you want to say. Use titles that will grab their attention, such as "Did you know?" or "5 Things to Make you Broke."

Notes:
- She said that a lot of these businesses are "cottage businesses," which means that they employ seasonally, containing around ten to fifteen employees on average.

- Jacqueline mentioned that the tour & safari operators have their season mainly between May and November, but have found that recently they have been busy in their off season.

- Community Based Natural Resource Management (CBNRM) "provides a powerful set of broad, robust and useful networking tools aimed at linking stakeholders". (http://www.cbnrm.net/)

- We were invited to a meeting being held on the 20th of March which will be discussing the levy tax and we will have the opportunity to meet other important executives within the tourism sector. The meeting will be from 8:30 to 13:00.

1. **How long have you worked in the tourism industry?**
   17 years total—the first 11 years were working for Air Namibia.
   a. **How long have you worked for NTB?**
      6 years

2. **What does your position entail?**
   Implementing a market strategy and supporting and consulting with the NTB satellite offices overseas.

3. **What is the purpose of the tour operator fact sheets that the NTB collects?**
   The tour operator fact sheets were used to build up a collection of data to see what companies in Namibia offer, as far as their facilities and operations. For example, if there is a demand for stargazing, you can look to see which companies offer stargazing. If there aren't many that do, then the NTB can notify the companies that stargazing is currently an important aspect of tourism.

   a. **Where is this information going?**
      This information is being compiled by the NTB.

4. **We are trying to figure out what the most important indicators are for each sector in order to track and measure tourism performance. (add/ remove current indicators)**
   a. **What do you consider the most important quantitative indicators for the four sectors that we are focusing on?**
      Agreed with indicators

   b. **What do you consider the most important qualitative indicators for the four sectors that we are focusing on?**
      Agreed with indicators

5. **Look at TDEFs**
   a. **Do you have any suggestions of better questions to include?**
      The hotels should have the average room rate (rack rate), which is a good indication about the pricing structure. The average rate for the trophy hunting will also be appropriate, instead of listing each animal and the corresponding cost. Also, check on the definitions of the types of vehicles when you meet with a CARAN representative.

6. **For our project, we will be creating a barometer containing information we collect from each of the four sectors.**
    a. **Do you have any suggestions on how we should organize the barometer for each sector? (thinking of doing a newsletter)**
    Every barometer should be a specific page for each type of stakeholder, similar to an executive summary.

Notes:

- When considering the five companies to choose, check which accommodation businesses have submitted their levy forms and how complete they have made them. This may give us insight into how reliable the company may be to speak with.

- Drop off revised TDEFs to Shareen and she will look over them for us.

1. **How long have you worked in the tourism industry?**
   I have worked for HAN the past 10 years. My first career was journalism.
   a. **How long have you worked for HAN?**
      10 years

2. **What does your position entail?**
   I serve as the channel for communication between the associations. I gather the information from the various associations and send the updated information via E-mail on a weekly basis. There is also an annual report that I work on and send out.

3. **Does HAN track tourism performance?**
   a. **If so, how?**
      In 1999/2000, they created a form that tracks room and bed occupancy and where the guest is from. It was not required at first, but even now, when it is, only about 1/3 of the businesses actually submit it. Only about 10% response rate would be sufficient because that would still provide enough information.

4. **Does HAN use a database?**
   Yes, HAN has its own database. It includes information regarding the activities offered at the various accommodation establishments.

5. **We are trying to figure out what the most important indicators are for each sector in order to track and measure tourism performance. (add/ remove current indicators)**
   I believe that the accommodation sector TDEF should include the length of stay. Because there is a current form for this sector, we should not have a separate form for the businesses to fill out; instead, we should link our form and the current form into one document.

   a. **What do you consider the most important quantitative indicators for the accommodation sector?**
      Length of stay should be included. Anything financial may be difficult to collect because of the small businesses competing with each other.

6. **Do you focus mainly on hotels, inns, etc. or do you also track information related to tour & safaris or trophy hunting that provide accommodation themselves?**
   Camping sites aren't part of the levy. Many trophy hunters are part of HAN because they also include accommodations.

7. **Look at Accommodation TDEF**
   a. **What questions would you consider sensitive or unlikely to receive answers?**
   Anything financial due to competition

   b. **What is the exact breakdown of types of accommodations in Namibia?**
   Look at the current forms. They should provide good information.

   c. **What type of nationality information do you record? How specific?**
   We want to keep track of where they are from (origin).

8. **Do you have any suggestions for companies that you think would be willing to fill out our TDEF?**
   The larger groups would be best to contact because they would be willing to help you more than the smaller companies.
   Some people I can suggest are:
   - Natalie Ahrenes
   - Gondwana Collection
   - Ilse De wet, Namibia Country Lodges
   - Graham Howard
   - Dustern Brook
   - Johan Vaatz (Guest Farm)

9. **For our project, we will be creating a barometer containing information we collect from each of the four sectors.**
   a. **Do you have any suggestions on how we should organize the barometer for the accommodation sector? (thinking of doing a newsletter)**
   Keep it simple. Include graphs in boxes for the main data, such as occupancy, nationality, type of guest (if possible to find). You may want to split it up according to the different regions (Windhoek, the coast, North and South).

   b. **What information do you think stakeholders for the accommodation sector would like to see?**
   Occupancy, type of guest, and origin of traveler

Interview with Almut Kronsbein
- Namibian Professional Hunters Association (NAPHA)
- CEO of NAPHA; Vice President of the Board for FENATA

Conducted In Person on 14 March 2008

Interviewer: Allison Dassatti

1. **How long have you worked in the tourism industry?**
   I have worked in the tourism industry since 1992.

   a. **How long have you worked for NAPHA?**
      She has worked for NAPHA since 1999.

2. **What does your position entail?**
   NAPHA has been operating for 36 years (1973/74) and works to create a sustainable environment within the country of Namibia, gives value to wildlife, allows overseas hunters to experience a new environment, and is a voice for the 460 members to correspond with the government of Namibia.

3. **We understand that trophy hunting has had some difficulty recently. Do you believe it is still feasible for us to interview trophy hunting operators?**
   I feel that the way in which the audit was conducted was incorrect. It is still feasible for your project to focus on the trophy hunting operators, but you should be careful about asking for money earnings or profit margin.

4. **We are trying to figure out what the most important indicators are for each sector in order to track and measure tourism performance. (add/ remove current indicators)**
   a. **What do you consider the most important quantitative indicators for the trophy hunting sector?**
      Agreed with indicators we provided.

   b. **What do you consider the most important qualitative indicators for the trophy hunting sector?**
      Agreed with indicators we provided.

5. **Look at the TDEF**
   a. **Do you have any suggestions of better questions to include?**
      The information you are looking for can be found at the Ministry of Environment & Tourism. After NAPHA obtains a permit for a hunter, NAPHA must submit a form 30 days after the permit is given providing information such as the trophy fees, number of animals hunted, etc. Information must also be submitted every 1st of December for every trophy hunting operation. You should set up an interview with the Ministry of Environment & Tourism to see exactly what information they collect and use that data instead of sending out an additional form.

6. **For our project, we will be creating a barometer containing information we collect from each of the four sectors.**
   a. **Do you have any suggestions on how we should organize the barometer for the trophy hunting sector? Is there a certain format that would be easy to read?**
      She informed us that trophy hunting is split up into three sections:
      1) Farm hunting (stock farmers)
      2) Free lancing professional hunters (more expensive)
         - do not own the property
         - buy the game to bring in and then sell it to their clients
      3) Communal areas/ concession areas

- **Vice Chairman of Car and Rental Association of Namibia (CARAN)**
- **Owner of B-Mobile**

Conducted in person on 14 March 2008

Interviewer: Amanda DeBaie

1. **How long have you worked in the tourism industry?**
   7 years previously - a GM for a local Avis branch, and currently the owner of B Mobile

2. **How long have you worked for CARAN?**
   7 years

3. **What does your position entail?**
   My job as the Vice Chairman of CARAN assists in setting standards for the car rental and car hire industry.

4. **How does your company track your clients? Type of information**
   For CARAN, since there are only 18 businesses registered in the association, nothing is done formally. Most of the information is obtained from the NTB. As for B Mobile, information recorded is the purpose of the trip (business or leisure), language spoken, nationality, and type of vehicle being rented.

5. **We are trying to figure out what the most important indicators are for each sector in order to track and measure tourism performance. (add/ remove current indicators)**
   Instead of asking for number of cars available, it is more important to find out about billed days. That is because the turnover would be a better indicator to provide a non-skewed data set. For example, average rental length of Avis is about 6 days. For B-Mobile it is about 13 to 14 days. Therefore while there are fewer vehicles to rent out for B-Mobile, the health of the company is not any worse than Avis. In summary, to determine the health of the business it is best to get the average length of rental along with the cost of vehicle.

6. **Look at TDEFs**
   a. **What are the types of cars to include in the TDEF?**
      The category goes from Group A – Group E and Group G and Group H
      Group A, B are Economy/Compact cars
      Group C, D, E consists of Intermediate cars – i.e. VW Passat
      Group G are premium vehicles – SUV, Pickups, so mostly 4x4 vehicles
      Group H are the vans

   b. **What are some other important indicators to include in the TDEF?**
      Length of stay and nationality of renters

7. **For our project, we will be creating a barometer containing information we collect from each of the four sectors.**
   a. **Do you know any other companies or organizations that would be interest in seeing the barometer?**
   For the government stakeholder group, Department of Transport and Communication, and Ministry of Environment & Tourism should be included in the group.

- Namibia Tourism Board
- IT Technician Staff

Conducted in person on 18 March 2008

Interviewer: Allison Dassatti

1. **How long have you worked in the information technology field?**
   2 years.

2. **What is your experience with Microsoft Excel, Access, and Publisher?**
   I have experience with Microsoft Access and Excel through working at the NTB, but have only used Publisher on my own.

3. **Show the diagram of the methodology outline and explain that we will be providing recommendations but will not be physically implementing the database. This will be done when we leave.**
   a. **What databases has the NTB used in the past or is currently using?**
      The NTB is using Access as their primary method of collecting data.

   b. **Is it feasible to use Microsoft Excel?**
      Yes, this would be a good program to use to gather data for the TDEFs.

   c. **Is it feasible to convert the Excel spreadsheets into Access?**
      They are compatible and can be converted.

   d. **Will there be someone able to do this? Is there anyone currently that works with databases here at the NTB?**
      I will be able to set up the system, and there are employees who input data from the accommodation levy forms when they are sent into the NTB. The NTB also contracts IT technicians to update their system.

3. **After we have gathered the information from the TDEFs, they will be entered into the database (as described above) and then the information will be presented through a barometer. Show example barometer.**
   a. **We are doing this by using Microsoft Publisher; is this available for use at the NTB?**
      Publisher is part of the Microsoft package that the NTB uses.

   b. **Is this something that will be able to be done by the NTB staff?**
      Johanna and other staff members will be able to update the barometer every two months based on the information sent in from the TDEFs.

   c. **Do you have any suggestions to improve the barometer?**
      The format looks very nice so far.

1. **How long have you worked for the Ministry of Environment and Tourism?**
   27 Years

2. **What data do you currently collect on tourism statistics for the trophy hunting sector?**
   We collect information such as status, name, ID number, hunting farm, number of people, duration, species, and nationality.

3. **How is the current system working?**
   It's not working very well. The 30 day report isn't working because a hunt could last more than 30 days, so the data is not always accurate.

4. **Who collects the data and how?**
   They pick up forms from the Ministry and drop it off. I'm not sure who collects it or how.

5. **What is the time frame for the data, i.e., when are the forms submitted and when is the data available?**
   The forms are submitted in November and then by February/March, they should have the data available.

6. **We have drafted a form called the Tourism Data Entry Form (TDEF). Do you have any comments or suggestions for us?**
   Some things you should have on it would be nationality, daily rates charged, trophy prizes, number of trophies, what kind of trophy and the number of guests. For the daily rates and trophy prizes, just ask for the average.

7. **We spoke with Almut last week, and she referred us to you. Do you have any suggestions of businesses to interview to see how feasible the TDEFs are?**
   You should contact her again and ask about the questionnaire and what businesses to contact. Opinion based questions would be best. You can also have a list of things that can be charged. Also look into taxidermists and other companies that correspond to the trophy hunting industry.

8. **From the information collected from the TDEFs, we will create a barometer. Do you have any suggestions for the barometer and what stakeholders would want to see on it?**
   Split up the different trophy hunting businesses

Notes:

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This is s free market system, so they charge what they want. This will make it difficult to collect data. Also, we need to know how to market hunting better. You should contact Ronalda Jansen from the permit office and Peter Erb.

1. **How long have you worked for the Ministry of Environment and Tourism?**
    16 years

2. **We understand that permits are given to hunters for the trophy hunting sector.**
    a. **Would you be able to take us through the permit process, including time periods for passing out and receiving the permits?**
        The forms required for the trophy hunting operators are at the reception area. They are divided into trophy hunter, hunting guides, master hunting guides, and professional hunter. It is a requirement to apply for re-registration every year between the 1st of April and the 31st of March. Information required includes the number of hunts from the previous year, insurance information, hunters, professional guides, first aid requirements, etc. The forms are sent through fax, E-mail, and physical copy.

3. **Would we be able to get a copy of a blank permit?**
    Yes, we received a copy.

4. **How the permits stored once they are collected?**
    They are E-mailed, mailed, and faxed.
    a. **Do you use a database? If so, which one?**
        Yes, Microsoft Access.

    b. **How are the permits sorted?**
        They are divided into hunting guides, master hunting guides, farms, etc.

5. **How many permits do you receive daily?**
    Averages of 120 permits per day are given.

6. **How long do you store your permits in your records?**
    They are not deleted, only updated. Therefore, the permits stay in their records.

7. **Explain barometer**
    a. **Would the Ministry be able to share information collected with the NTB for our barometer?**
        Yes—we made a copy of the front page of their database.

b. What would the Ministry be interested in seeing on our barometer?
Nationality, number of hunters for the different seasons

1. **How long have you worked for the Bank of Namibia?**
   5 Years

2. **We understand the Bank of Namibia produces reports, e.g., quarterly bulletins and economic outlook. How and where do you gather these statistics?**
   The Bank of Namibia contacts companies to find everyone that has interactions within Namibia. An "exploratory" survey is sent out once a year. This survey is typically one page and contains check-box questions as well as open-ended questions.

3. **How are the statistics submitted to the Bank of Namibia via E-mail, fax, mail?**
   The statistics are primarily submitted through E-mail (approximately 90% of the sample). A few companies still use fax, while approximately two companies have the forms mailed to them for completion. The companies are asked to complete the form within two weeks. However, the Bank of Namibia is working to develop a website where companies can submit their surveys electronically to be directly inputted into the database system.

4. **How do you store the statistics? In a database system? How is this system efficient/inefficient?**
   The statistics are stored in Excel spreadsheets; however, a database system is being developed to replace the Excel spreadsheets. Since many of the spreadsheets are only available on an employee's hard drive, other employees do not have access to it. This would be fixed by providing a central database system.

5. **Who are your target audiences for reading your publications like financial professionals only, business owners, etc? Also, how does your publication work?**
   The Bank of Namibia currently publishes a quarterly bulletin. They focus on four primary sectors in the area of finance: (1) balance of payments; (2) real sector; (3) monetary and financial statistics; (4) government finance. Each of these sectors has teams that work to report statistical data in the form of the bulletin. The reports are compiled and usually take a couple months to finally be published (i.e. the 4th quarter report was published at the end of March of the following year). The bulletins are posted online for viewing, while some of the companies receive a hard copy.

6. **Explain barometer. What would the Bank of Namibia be interested in seeing on our barometer, i.e. nationality of clients, market trends in the tourism sectors?**

The Bank of Namibia would be interested in seeing the number of arrivals and from where. Statistics such as the nationality and the number of domestic vs. international tourists would also be important. The Bank already receives information from HAN and the Ministry of Environment & Tourism involving accommodation and trophy hunting statistics, respectively.

1. **What is your current position in the company?**
   I have been the owner of CrissCross Namibia since 2005.

2. **What kind of data does your company collect from your clients?**
   I would like to know how old the client is and what their status is (student, professional, retired).
   a. **For what purposes do you collect this data?**
      This information is useful to know in order to find out how much the client can afford to spend and what they would be interested in doing and seeing.

3. **How are the data collected?**
   I talk to them via telephone or through an agency in various countries, mostly the United States.

SURVEY QUESTIONS

1. **We plan on passing out our Tourism Data Entry Form (TDEF) every two months. Would this be a sufficient time period for your company to report its' financial data?**
   Yes. I recommend E-mail as the best way to distribute the TDEFs and to give companies one week to respond.

2. **Would your company prefer to submit this form via an Internet website, E-mail, fax, or through mail?**
   E-mail

3. **Do you have any additional comments?**
   The most important information to see on the barometer is the different age groups, the type of accommodation preferred, nationality, and average length of stay. Other factors that affect my business are exchange rates, prices, the USA's recession, and political circumstances. I also recommended you talk to Caprivi Car Hire for our Vehicle Rental & Car Hire Sector. A week would be an acceptable time to fill out our form and he does not fill out any other forms right now.

4. **May we contact you again if necessary? Would you be willing to fill this form out once revisions have been made?**
   Yes for both

1. **What is your current position in the company?**
   Manager of Dollar Thrifty Car & Kea Campers

2. **What kind of data does your company collect from your clients?**
   I would like to know what types of vehicle, purpose of visit (business or leisure); Nationalities – Namibian gets a discount; where clients have heard of our company.
   a. **For what purposes do you collect this data?**
      The collected information would assist in decisions regarding inventory and/or marketing

3. **How are the data collected?**
   My associates and I communicate via telephone, email, fax, or in person.

4. **What database is used to store such information?**
   I-soft from South Africa developed a database system for car registration info.

   SURVEY QUESTIONS
1. **We plan on passing out our Tourism Data Entry Form (TDEF) every two months. Would this be a sufficient time period for your company to report its' financial data?**
   Yes. I think since the form is very short and doesn't require looking up any data, it is easy to complete and no incentive should be given.

2. **Would your company prefer to submit this form via an Internet website, E-mail, fax, or through mail?**
   E-mail

3. **Do you have any additional comments?**
   Peak season is from July – November and the low season was from December – June in the past 2 years. Now, the seasons are more leveled throughout the year.

4. **May we contact you again if necessary? Would you be willing to fill this form out once revisions have been made?**
   Yes for both

Dear Tourism Colleagues

This email serves to inform you about the NTB's upcoming research project. As from 5 March 2008 a group of students from the Worcester Polytechnic Institute, USA will join the NTB for about 6-8 weeks to conduct research on the development of a Tourism Barometer.

You will all agree that we need a quick way to capture the performance of our sector so that information is available in a short period for all of us to make strategic decisions. A Barometer is such a system that reports on business performance; assessing past and present trends within the industry; future prospects and the general market performance of tourism. The NTB already tracks the performance of the accommodation establishments through the levy system, but a more holistic approach is needed that include also the other sectors. Due to the short time frame of the project we decided to only include accommodation (with focus on conferencing), car rentals, tour and safari operators and trophy hunting operators. The NTB can include the other sectors at a later stage as the system will then be already in place.

The students may contact you via email just to obtain some general information in order to finalize the detail project outline. We kindly request your good cooperation. Find below a brief outline of the project and do not hesitate to contact me if you have any questions.

Regards,

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Brief Project outline:

Regular Tracking of the Performance of the Tourism Industry

Background and Problem

It is imperative to monitor and evaluate the marketing activities of the Namibia Tourism Board in order to determine if the required impacts are achieved with the implemented strategies. Tourism is

a dynamic and quick changing industry. Hence, tracking of performance on a regular basis is important. A tourism barometer is one of such ways to track performance. It reports on business performance; assessing past and present trends within the industry; future prospects and the general market performance of tourism. This kind of study is usually carried out with a panel of tourism businesses spread across all areas of a country (this would serve as the tourism index); all types of tourism businesses should therefore participate. At present, the NTB is slow in adapting strategies because the information used to monitor performance is only available after 12 months.

In the same vein, it does not help if NTB keeps the information internally – it should be distributed to the stakeholders. It is well known that tourism cuts across several sectors involving different stakeholders. It is part of the NTB's responsibilities to inform or update stakeholders about different aspects of tourism. In Namibia, raising awareness about tourism, is still a very important activity since a large percentage of residents are not engaged in tourism and thus lacks general knowledge. The economic importance of tourism and progress on performance of the industry is very important information and has to be disseminated to different stakeholders with different levels of knowledge about tourism. Therefore, a strategy should be put in place to distribute relevant information and in the appropriate format to the different types of stakeholders.

Objectives

1. To constitute a barometer to regular track performance of tourism;
2. To develop a communication strategy on how to distribute information to relevant stakeholders

Outputs

Key variables/indicators to constitute a regular tracking study amongst a panel of tourism businesses;

- Guidelines on the implementation of the barometer;
- List of tourism businesses to be included on panel;
- A list of stakeholders grouped by type;

- Recommendations on the format to communicate information to each of the stakeholder groups/types

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APPENDIX I: MANAGING DATA: DATABASE DESIGN

Databases are used to organize, store, and manage information. They are formatted into tables, which are similar to spreadsheets in Microsoft Excel (The New York Times Company, 2008). These tables consist of both columns and rows, with each column containing a different attribute (a single item that is related to the database object) and each row corresponding to a single record. Databases and spreadsheets have similarities; however, there are many reasons for using a database instead of a spreadsheet. Databases can sort information based on a criteria, update records in bulk, cross-reference data that are in different tables, and perform complex calculations that would otherwise be difficult to perform by using a spreadsheet.

Database Management Systems (DBMS) are divided into two groups: server databases and desktop databases (The New York Times Company, 2008). Server databases are geared towards multi-user applications, making them more expensive than desktop databases because they run on high- performance servers. Desktop databases, however, are geared towards single users on personal computers, thus they are more affordable.

The different types of databases (The New York Times Company, 2008) include Oracle, SQL Server, Microsoft Access, MySQL, DB2, and Paradox. Microsoft Access is a practical database system to track tourism performance in Namibia. This database is an entry-level database; however, its flexibility will enable it to be used by a variety of businesses that consist of different computer software backgrounds. Microsoft Access is an example of a desktop database, thus it is inexpensive (around $100—thousands of dollars less than server-based databases), user-friendly, and it enables publications on the web. Microsoft Access also allows integration with other databases such as Oracle and Microsoft SQL Server, which are more complex than Microsoft Access.

NTB Tourism Data Entry Form (TDEF):

Accommodation Sector
January - February 2008

Name of Business:	
NTB Registration number:	
Date of Submission:	
Contact person:	

Deadline for this form is: 09 APRIL 2008

The following questions apply to the two-month period from Jan - Feb 2008.

1.) Total number of clients during the months of Jan - Feb 2008

2.) List the number of clients based on the purpose of visit during the months of Jan - Feb 2008

	Holiday/Leisure
	Conference
	Business
	Other

3.) List the number of clients based on country of their present residence during the months of Jan - Feb 2008

	Namibia		Spain
	South Africa		Portugal
	Angola		Belgium, Luxembourg, Netherlands
	Other SADC countries		Other European Countries not listed
	Rest of Africa		USA & Canada
	Germany, Switzerland, Austria		South America
	France and its Dominations		Asia
	Italy		Australia
	United Kingdom and Ireland		New Zealand
	Denmark, Finland, Norway, Sweden		Country not listed above

4.) Please mark the appropriate column. When comparing Jan - Feb 2007 with Jan - Feb 2008, how did the number of clients change for each country?

	Increase	No change	Decrease
Namibia			
South Africa			
Angola			
Other SADC countries			
Rest of Africa			
Germany, Switzerland, Austria			
France and its Dominations			
Italy			

United Kingdom and Ireland			
Denmark, Finland, Norway, Sweden			
Spain			
Portugal			
Belgium, Luxembourg, Netherlands			
Other European Countries not listed			
USA & Canada			
South America			
Asia			
Australia			
New Zealand			
Country not listed above			

5.) *Compared* to Jan - Feb 2007, the number of clients have _____ .

- [ ] Increased
- [ ] Not Changed
- [ ] Decreased

6.) For the upcoming months of Mar - Apr 2008, you *expect* the number of clients to _____ .

- [ ] Increase
- [ ] Not Change
- [ ] Decrease

7a.) Overall, your *rack rates* have _____ in comparison to the months of Jan - Feb 2007.

- [ ] Increased by [ ] %
- [ ] Not Changed
- [ ] Decreased by [ ] %

7b.) Which factors have influenced your Rack Rates during the months of Jan - Feb 2008. (check all that apply)

- [ ] Food prices
- [ ] Gas prices
- [ ] Electricity prices
- [ ] Labor costs
- [ ] Interest rate
- [ ] Taxes
- [ ] Exchange rate
- [ ] Seasonality
- [ ] Natural disasters
- [ ] Other

8.) What was your *major capital investment(s)* for your business during the months of Jan - Feb 2008? Please specify the *amount* (N$).

Major capital investment(s)	Amount	
_____	N$	
_____	N$	
_____	N$	

9.) Which 2 new markets (two important countries) would you like to enter?

10.) If you have any comments or concerns, please let us know.

NTB Tourism Data Entry Form (TDEF):

Tour & Safari Sector
January - February 2008

Name of Business:	
NTB Registration number:	
Date of Submission:	
Contact person:	

Deadline for this form is: 09 APRIL 2008

The following questions apply to the two-month period of from Jan - Feb 2008.

1.) Type of tours offered (check all that apply)

	Scheduled Tours		Group Tours
	Self-drive/FIT tours		Overland Tours
	Camping Tours		Fly-in Safaris
	Special Interest Tours		Other

2.) Average length of trip during the months of Jan - Feb 2008 (check ONE)

	1-4 days		13-16 days
	5-8 days		17-20 days
	9-12 days		21+ days

3a.) *Total number* of clients during the months of Jan - Feb 2008

3b.) List the *number* of clients based on *country of their present residence* during the months of Jan - Feb 2008

	Namibia		Spain
	South Africa		Portugal
	Angola		Belgium, Luxembourg, Netherlands
	Other SADC countries		Other European Countries not listed
	Rest of Africa		USA & Canada
	Germany, Switzerland, Austria		South America
	France and its Dominations		Asia
	Italy		Australia
	United Kingdom and Ireland		New Zealand
	Denmark, Finland, Norway, Sweden		Country not listed above

4.) Please mark the appropriate column. When comparing *Jan - Feb 2007* with *Jan - Feb 2008*, how did the number of clients *change* for each country?

	Increase	No change	Decrease
Namibia			
South Africa			
Angola			

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Other SADC countries			
Rest of Africa			
Germany, Switzerland, Austria			
France and its Dominations			
Italy			
United Kingdom and Ireland			
Denmark, Finland, Norway, Sweden			
Spain			
Portugal			
Belgium, Luxembourg, Netherlands			
Other European Countries not listed			
USA & Canada			
South America			
Asia			
Australia			
New Zealand			
Country not listed above			

5.) _Compared_ to Jan - Feb 2007, the number of clients have _____ .

- [ ] Increased
- [ ] Not Changed
- [ ] Decreased

6.) For the upcoming months of Mar - Apr 2008, you _expect_ the number of clients to _____ .

- [ ] Increase
- [ ] Not Change
- [ ] Decrease

7a.) Overall, your _rack rates_ have _____ In comparison to the months of Jan - Feb 2007.

- [ ] Increased by _____ %
- [ ] Not Changed
- [ ] Decreased by _____ %

7b.) Which factors have influenced your Rack Rates during the months of Jan - Feb 2008. (check all that apply)

- [ ] Food prices
- [ ] Gas prices
- [ ] Electricity prices
- [ ] Labor costs
- [ ] Interest rate
- [ ] Taxes
- [ ] Exchange rate
- [ ] Seasonality
- [ ] Natural disasters
- [ ] Other

8.) What was your _major capital investment(s)_ for your business during the months of Jan - Feb 2008? Please specify the _amount_ (N$).

Major capital investment (s)   Amount

N$	
N$	
N$	

9.) Which 2 new markets (two important countries) would you like to enter?

10.) If you have any comments or concerns, please let us know.

NTB Tourism Data Entry Form (TDEF):   Vehicle Rental & Car Hire Sector

January - February 2008

Name of Business:	
NTB Registration number:	
Date of Submission:	
Contact person:	

Namibia Tourism Board

The following questions apply to the two-month period from Jan - Feb 2008.

1.) Type of vehicle(s) offered (check all that apply)

☐	Group A (Compact/Economy)	☐	Group E (Intermediate)
☐	Group B (Compact/Economy)	☐	Group G (Premium : SUV, Pickups, etc.)
☐	Group C (Intermediate)	☐	Group H (Van)
☐	Group D (Intermediate)	☐	Other

2.) Average billed days (check ONE)

☐	1-4 days	☐	13-16 days
☐	5-8 days	☐	17-20 days
☐	9-12 days	☐	21+ days

3a.) *Total number* of rentals during the months of Jan - Feb 2008

3b.) List the *number* of clients based on *country of their present residence* during the months of Jan - Feb 2008

	Namibia		Spain
	South Africa		Portugal
	Angola		Belgium, Luxembourg, Netherlands
	Other SADC countries		Other European Countries not listed
	Rest of Africa		USA & Canada
	Germany, Switzerland, Austria		South America
	France and its Dominations		Asia
	Italy		Australia
	United Kingdom and Ireland		New Zealand
	Denmark, Finland, Norway, Sweden		Country not listed above

4.) Please mark the appropriate column. When comparing Jan - Feb 2007 with Jan - Feb 2008, how did the number of clients *change* for each country?

	Increase	No change	Decrease
Namibia			
South Africa			
Angola			

Other SADC countries			
Rest of Africa			
Germany, Switzerland, Austria			
France and its Dominations			
Italy			
United Kingdom and Ireland			
Denmark, Finland, Norway, Sweden			
Spain			
Portugal			
Belgium, Luxembourg, Netherlands			
Other European Countries not listed			
USA & Canada			
South America			
Asia			
Australia			
New Zealand			
Country not listed above			

5.) *Compared* to Jan - Feb 2007, the number of clients have _____ .

- [ ] Increased
- [ ] Not Changed
- [ ] Decreased

6.) For the upcoming months of Mar - Apr 2008, you *expect* the number of clients to _____ .

- [ ] Increase
- [ ] Not Change
- [ ] Decrease

7a.) Overall, your *rack rates* have _____ in comparison to the months of Jan - Feb 2007.

- [ ] Increased by [   ] %
- [ ] Not Changed
- [ ] Decreased by [   ] %

7b.) Which factors have influenced your Rack Rates during the months of Jan - Feb 2008. (check all that apply)

- [ ] Food prices
- [ ] Gas prices
- [ ] Electricity prices
- [ ] Labor costs
- [ ] Interest rate
- [ ] Taxes
- [ ] Exchange rate
- [ ] Seasonality
- [ ] Natural disasters
- [ ] Other

8.) What was your *major capital investment(s)* for your business during the months of Jan - Feb 2008? Please specify the *amount* (N$).

Major capital investment (s)   Amount

N$	
N$	
N$	

9.) Which 2 new markets (two important countries) would you like to enter?

10.) If you have any comments or concerns, please let us know.

NTB Tourism Data Entry Form (TDEF):

Trophy Hunting Sector
February - March 2008

Name of Business:	
NTB Registration number:	
Date of Submission:	
Contact person:	

The following questions apply to the two-month period from Feb - Mar 2008.

1.) Total _number_ for _all game hunted_ during the months of Feb - Mar 2008

2.) List the number for each type of game hunted during the months of Feb - Mar 2008

#	Species	#	Species	#	Species
	Bleabok		Impala, common		Steenbok
	Buffalo		Klipspringer		Warthog
	Crocodile		Kudu		Waterbuck
	Dik-dik		Lechwe		Wildebeest, Blue
	Eland		Oryx		Wildebeest, black
	Elephant		Ostrich		Zebra, Burchell's
	Giraffe		Red hartebeest		Zebra, Hartmann's mtn
	Grey duiker		Roan antelope		Cheetah
	Hippopotamus		Sable antelope		Leopard
	Impala, black-faced		Springbok		Lion

3a.) Total number of clients during the months of Feb - Mar 2008

3b.) List the number of clients based on country of their present residence during the months of Feb - Mar 2008

	Country		Country
	Namibia		Spain
	South Africa		Portugal
	Angola		Belgium, Luxembourg, Netherlands
	Other SADC countries		Other European Countries not listed
	Rest of Africa		USA & Canada
	Germany, Switzerland, Austria		South America
	France and its Dominations		Asia
	Italy		Australia
	United Kingdom and Ireland		New Zealand
	Denmark, Finland, Norway, Sweden		Country not listed above

4.) Please mark the appropriate column. When comparing Feb - Mar 2007 with Feb - Mar 2008, how did the number of clients change for each country?

	Increase	No change	Decrease
Namibia			
South Africa			
Angola			
Other SADC countries			
Rest of Africa			
Germany, Switzerland, Austria			
France and its Dominations			
Italy			
United Kingdom and Ireland			
Denmark, Finland, Norway, Sweden			
Spain			
Portugal			
Belgium, Luxembourg, Netherlands			
Other European Countries not listed			
USA & Canada			
South America			
Asia			
Australia			
New Zealand			
Country not listed above			

5.) Compared to Feb - Mar 2007, the number of clients have _____ .

- ☐ Increased
- ☐ Not Changed
- ☐ Decreased

6.) For the upcoming months of Apr - May 2008, you expect the number of clients to _____ .

- ☐ Increase
- ☐ Not Change
- ☐ Decrease

7a.) Overall, your daily fees have _____ in comparison to the months of Feb - Mar 2007.

- ☐ Increased by [   ] %
- ☐ Not Changed
- ☐ Decreased by [   ] %

7b.) Which factors have influenced your daily fees during the months of Feb - Mar 2008. (check all that apply)

- ☐ Food prices
- ☐ Gas prices
- ☐ Interest rate
- ☐ Taxes
- ☐ Seasonality
- ☐ Natural disasters

☐ Electricity prices ☐ Exchange rate ☐ Other
☐ Labor costs

8a.) Overall, your trophy fees have _____ in comparison to the months of Feb - Mar 2007.

☐ Increased by [   ]%
☐ Not Changed
☐ Decreased by [   ]%

8b.) Which factors have influenced your trophy fees during the months of Feb - Mar 2008. (check all that apply)

☐ Food prices ☐ Interest rate ☐ Seasonality
☐ Gas prices ☐ Taxes ☐ Natural disasters
☐ Electricity prices ☐ Exchange rate ☐ Other
☐ Labor costs

9.) What was your major capital investment(s) for your business during the months of Feb - Mar 2008? Please specify the amount (N$).

Major capital Investment (s)   Amount

_____	N$	
_____	N$	
_____	N$	

10.) Which 2 new markets (two important countries) would you like to enter?

[   ]   [   ]

11.) If you have any comments or concerns, please let us know.

[   ]

Based upon the advice of NTB staff, the next step after receiving the TDEFs was to create a database to store and organize all of the incoming statistics. By using Microsoft Access, every TDEF whether it was received as hard copy from fax or an E-mail attachment can be imported into the database. Before the database was designed, we discovered that Microsoft Access is based on a *relationship system*, meaning that all tables, spreadsheets, charts, etc., are linked with one or more similar fields. For example, if Access is used to keep track of payroll for a certain company, one table would be "Employee information" with fields such as employee name, date of birth, Social Security Number, and employee ID. A separate table would be "Hours" which would include the day of the week and hours, hourly rate, and employee ID. A third table may be "Additional information", which would contain information such as past job history, criminal records, other miscellaneous notes, and again employee ID. Since employee ID was the commonality between the three tables, a *relationship* is formed with all three tables remain linked to provide a wide range of information.

With the understanding of how a relationship-based database operates, the database developed for the NTB's tourism performance tracking would follow a similar structure. The three main groups of information that were organized were "Sector", "Registered businesses" and "TDEF". "Sector" highlighted the four different sectors of business–accommodation, tour & safari, trophy hunting, in addition to vehicle rental and car hire. From the "Sector" table, it was linked to the "Registered businesses" table where all respondents would be listed and grouped into the four sectors mentioned above. Lastly, under each record from the table "Registered businesses", the corresponding TDEF would be displaying according to the individual business being reviewed. This three-step system maintained the hierarchy between the tables, thus organizing all data from a broad category–the sectors, to more detailed information–the TDEFs. Below, in Figure 1, is a print screen

of the tables in Microsoft Access. One can see that the table for the four sectors (labeled as 1) is sub-linked to businesses within the sector (labeled as 2), and then further linked to the record (labeled as 3).
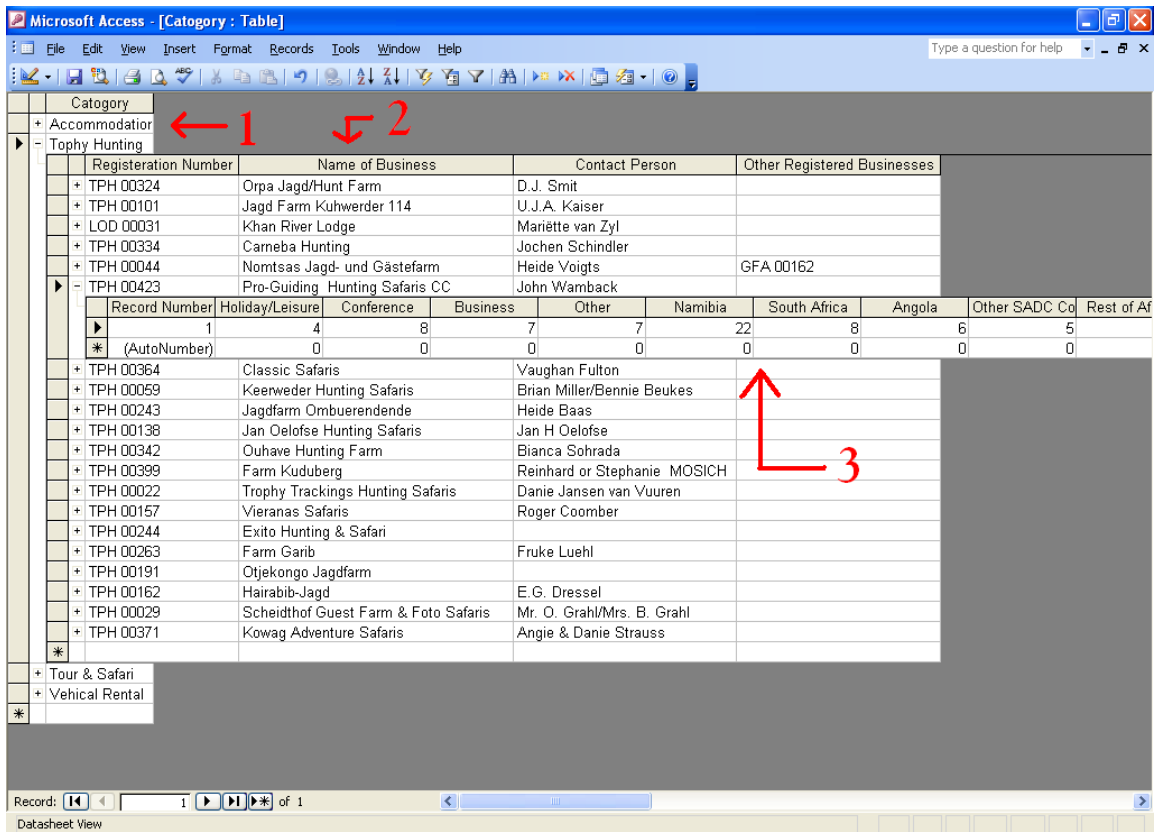

Figure 21: The Hierarchy and Relationship between the Tables in Microsoft Access

When the structure of the database was complete, the next stage was to create an interface that allows for a user-friendly data input method. There were two main reasons for creating an interface. First, since the interface would be formatted based on the TDEFs, a user-friendly input method allows for employees without any experience with Microsoft Access to input data with only a few clicks. Second, the creation of the interface would help eliminate human error because each

input area can be arranged and organized in a logical manner as opposed to a spreadsheet format.

Below are Figures 2 and 3 showing the two inputting methods.
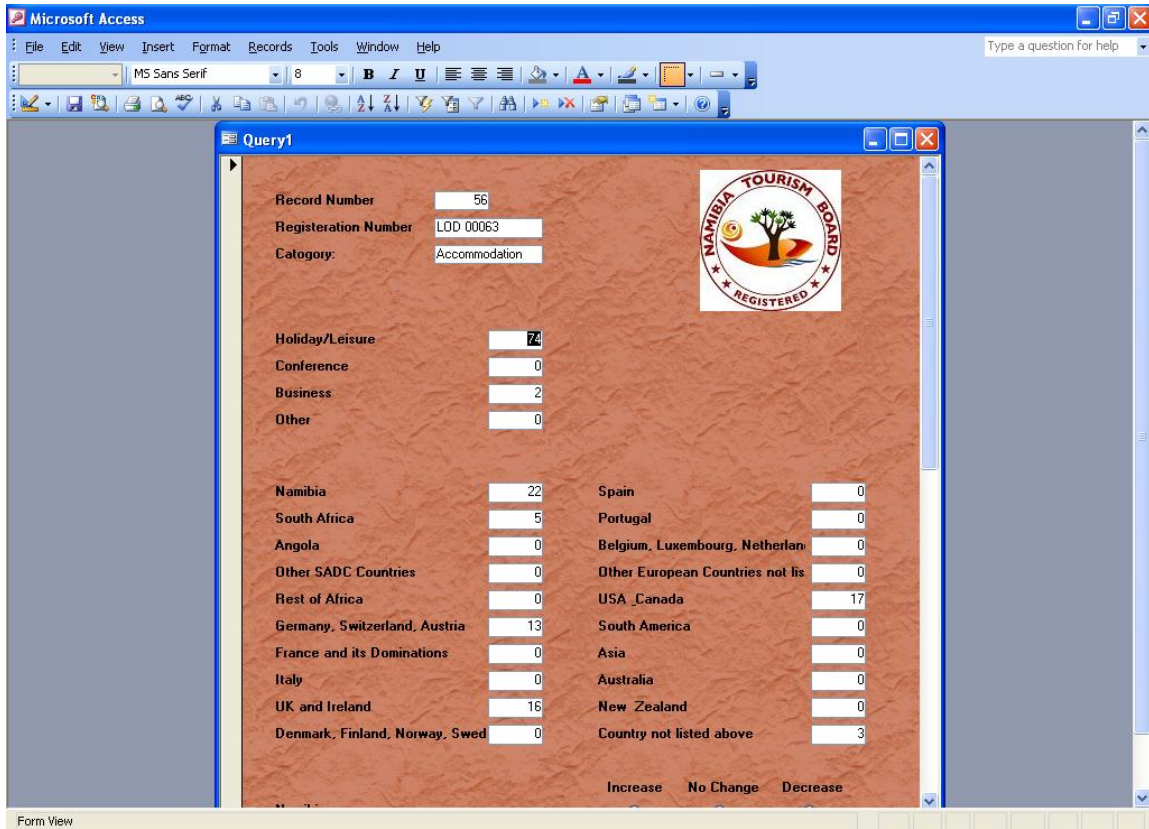
Figure 22: Microsoft Access TDEF Input Screen

Figure 23: Microsoft Access Table Input Screen

Record Number	Registration Nu	Total Client Nun	Holiday/Leisure	Conference	Business	Other	Namibia	South Africa	Angola	Oth
49	BBF 00017		0	0	0	0	0	0	0	
50	FOR 00041		0	0	0	0	0	0	0	
51	FOR 00050		0	0	0	0	0	0	0	
52	HOT 00012		0	0	0	0	0	0	0	
53	HOT 00045		0	0	0	0	0	0	0	
54	LOD 00031		0	0	0	0	0	0	0	
55	LOD 00048		0	0	0	0	0	0	0	
56	LOD 00063		74	0	2	0	22	5	0	
57	PEN 00059		0	0	0	0	0	0	0	
58	TFA 00027		0	0	0	0	0	0	0	
59	TFA 00039		0	0	0	0	4	4	0	
60	TPH 00022		0	0	0	0	0	0	0	
61	TPH 00029		0	0	0	0	0	0	0	
62	TPH 00044		0	0	0	0	0	0	0	
63	TPH 00059		0	0	0	0	0	0	0	
64	TPH 00101		0	0	0	0	0	0	0	
65	TPH 00138		0	0	0	0	0	0	0	
66	TPH 00157		0	0	0	0	0	0	0	
67	TPH 00162		0	0	0	0	0	0	0	
68	TPH 00191		0	0	0	0	0	0	0	
69	TPH 00243		0	0	0	0	0	0	0	
70	TPH 00244		0	0	0	0	0	0	0	
71	TPH 00263		0	0	0	0	0	0	0	
72	TPH 00324		0	0	0	0	0	0	0	
73	TPH 00334		0	0	0	0	0	0	0	
74	TPH 00342		0	0	0	0	0	0	0	
75	TPH 00364		0	0	0	0	0	0	0	
76	TPH 00371		0	0	0	0	0	0	0	
77	TPH 00399		0	0	0	0	0	0	0	
78	TPH 00423		0	0	0	0	0	0	0	
79	TSO 00009		0	0	0	0	0	0	0	
80	TSO 00012		0	0	0	0	0	0	0	
81	TSO 00038		0	0	0	0	0	0	0	
82	TSO 00063		0	0	0	0	0	0	0	

Record: 1 of 46   Datasheet View

Once every individual forms were manually inputted, the ultimate purpose for a database was its output feature. Because of the compatibility between Access and Excel, all of the information from Microsoft Access can be exported into an Excel spreadsheet. From there, various graphs can be generated to be included in the tourism barometer. The final version of the prototype database was 38.1 MB with one period (two months, 71 TDEFs) worth of data inputted. But because the set up of the database contributed the most to the file size, data inputted was minuscule as compared to the structure. An experiment was conducted with eight period worth of data inputted with no change to the size of the database at all. Therefore the size of this database is expected to remain similar.

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The Namibia Tourism Barometer

"Bringing Tourism News to Namibia"

Namibia Tourism Board

Volume 1, Issue 1   April 2008
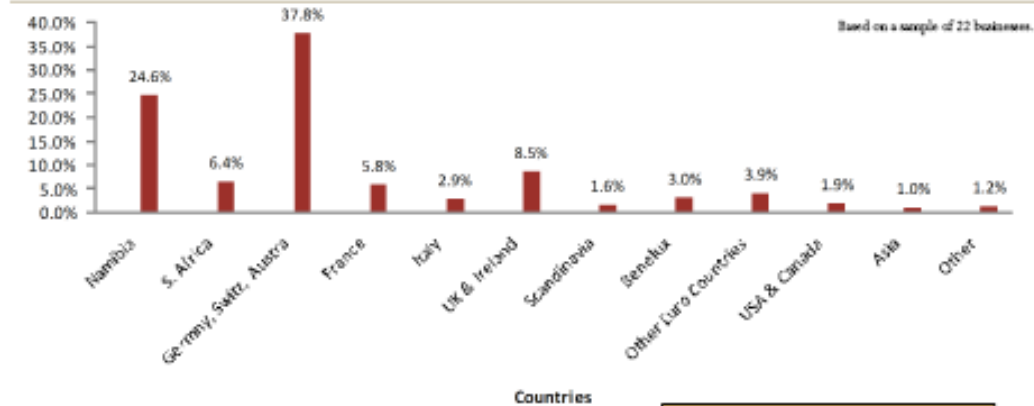
Introduction

Namibia Tourism Barometer, operated by the Namibia Tourism Board, is a bi-monthly publication which aims to examine changes in the current market performance in comparison to the same timeframe of the previous year; identify factors that may influence those changes; and establish future prospects. The Namibia Tourism Barometer concentrates on four tourism-related sectors—accommodations, vehicle rental and car hire, tour & safari, and trophy hunting. The following information is based on surveys gathered from 71 tourism establishments, corresponding to the business performance between January and February 2008.

COUNTRY OF PRESENT RESIDENCE FOR ACCOMMODATION, TOUR & SAFARI, VEHICLE RENTAL AND CAR HIRE:

JAN-FEB 2008

Based on a sample of 22 businesses.

Namibia 24.6%, S. Africa 6.4%, Germany, Switz., Austria 37.8%, France 5.8%, Italy 2.9%, UK & Ireland 8.5%, Scandinavia 1.6%, Benelux 3.0%, Other Euro Countries 3.9%, USA & Canada 1.9%, Asia 1.0%, Other 1.2%

Countries

Changes in the Country of Present Residence of Clients:

Between Jan/Feb 2008 vs. Jan/Feb 2007

INCREASE
- Germany, Switzerland, Austria
- France
- Italy

DECREASE
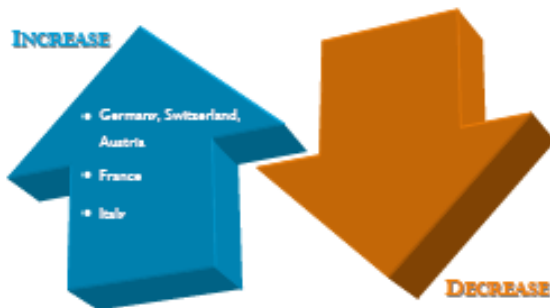
TOP 5 MARKETS TO ENTER

1) United States of America

2) Sweden

3) Norway

4) Spain

5) United Kingdom

If you are interested in participating in this survey, please contact:
Sophia Snyman
researchsophia@namibiatourism.com.na

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ACCOMMODATIONS

AVERAGE NUMBER OF CLIENTS BASED ON TYPE OF VISIT

Based on a sample of 7 businesses.
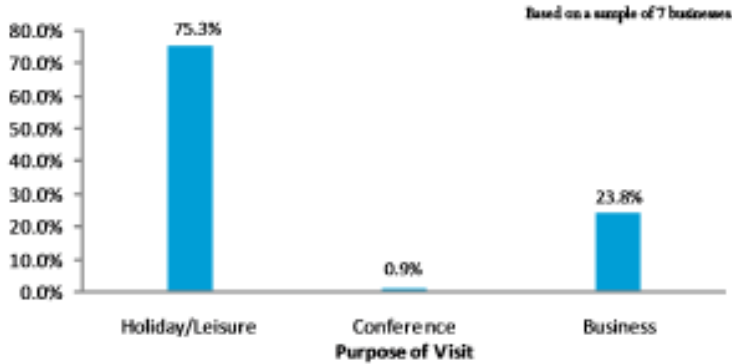
75.3% of clients were travelling for Holiday/ Leisure over the months of Jan-February 2008

23.8% were travelling for business purposes

0.9% attended a conference while visiting

EXPECTED CHANGE IN NUMBER OF CLIENTS: MAR–APR 2008

Based on a sample of 7 businesses.

72% of the companies believe the number of clients will increase from Jan-Feb 2008 to Mar-Apr 2008

14% believe that there will be no change in the number of clients

14% believe that there will be a decrease in the number of clients

14%
14%
72%

■ Increase   ■ No Change   ■ Decrease

FACTORS INFLUENCING RACK RATES

Based on a sample of 7 businesses.

Electricity	18.2%
Food Prices	22.7%
Gas Prices	18.2%
Interest Rates	18.2%
Labor Costs	18.2%
Natural Disasters	4.5%
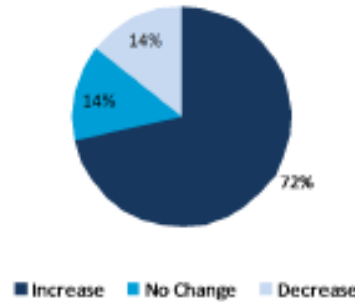
Factors
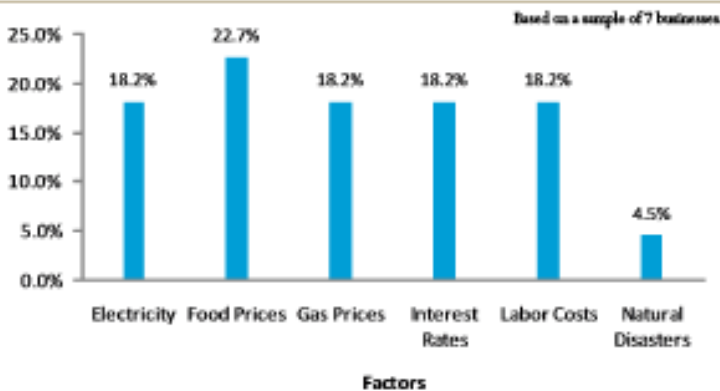
Rack Rates have increased at an average rate of 8.3% from Jan-Feb 2007 to Jan-Feb 2008

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TOUR & SAFARI

PERCENTAGES FOR TYPES OF TOURS GIVEN

Based on a sample of 7 businesses.
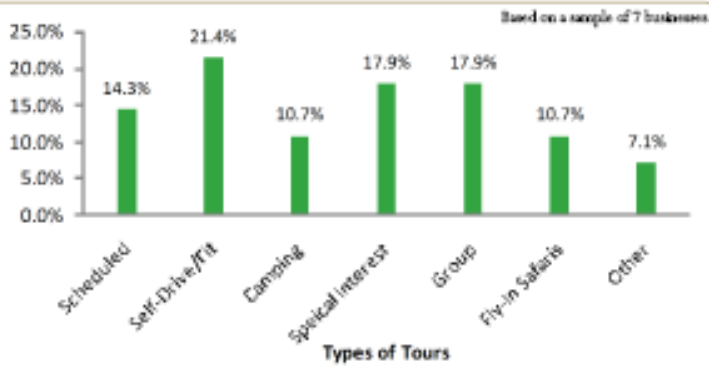
21.4% of tours given were Self-Drive/ Fit tours for Jan-Feb 2008

17.9% of the tours were Special Interest as well as Group tours
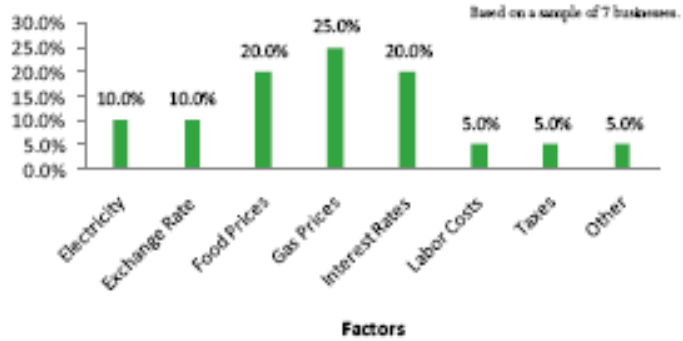
Rack Rates
have increased at an
average rate of
8.75%
from Jan-Feb 2007
to Jan-Feb 2008

FACTORS INFLUENCING RACK RATES

Based on a sample of 7 businesses.

AVERAGE LENGTH OF TRIP (DAYS)

Based on a sample of 7 businesses.

- 1-4
- 9-12
- 13-16

EXPECTED CHANGE IN NUMBER OF CLIENTS: MAR-APR 2008

Based on a sample of 6 businesses.

- Increase
- No Change
- Decrease
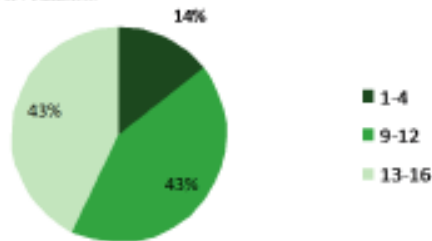
43% of trips are an average of 9-12 and 13-16 days

14% of trips are between 1-4 days long
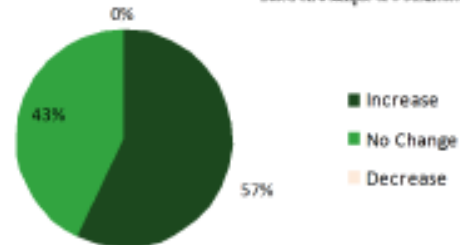
57% of companies believe that there will be an increase in the number of clients from Mar-Apr 2008

43% of companies believe there will be no change in the number of clients for Mar-Apr 2008

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VEHICLE RENTAL AND CAR HIRE

PERCENTAGE FOR TYPES OF VEHICLES OFFERED

Based on a sample of 6 businesses.

Type of Vehicle Key

Group A—Compact/Economy

Group B—Compact/Economy

Group C—Intermediate

Group D—Intermediate

Group E—Intermediate

Group G—Premium: SUV, Pick-Ups, etc.

Group H—Van
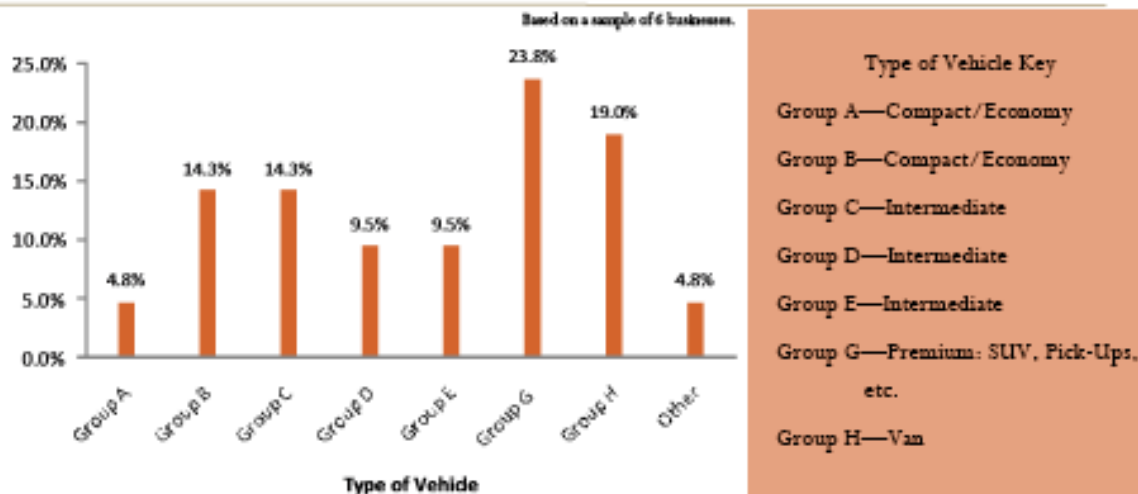
FACTORS INFLUENCING RACK RATES: JAN-FEB

23.8% of car rental companies use Group G type vehicles

19.0% of companies use Group H type vehicles

The average number of billed days is 9–12 days and 13–16 days

Rack Rates have increased an average of 1.2%

Based on a sample of 5 businesses.

EXPECTED CHANGE IN NUMBER OF CLIENTS: MAR-APR 2008

Based on a sample of 5 businesses.

- Increase
- No Change
- Decrease
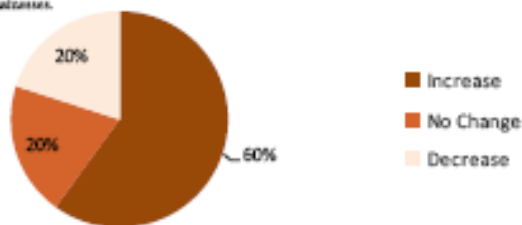
60% of Vehicle Rental and Car Hire companies believe the number of clients will increase in Mar-Apr 2008

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TROPHY HUNTING

FACTORS INFLUENCING DAILY AND TROPHY FEES: FEB–MAR 2008

Based on a sample of 7 businesses.

■ Factors Influencing Trophy Rates

■ Factors Influencing Daily Fees

Factors
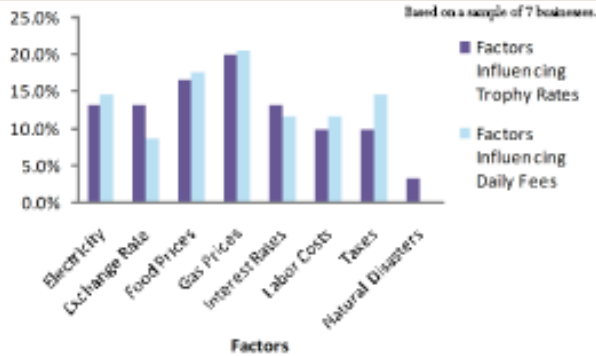
Trophy Fees have increased at an average rate of 7.67% from Jan-Feb 2007 to Jan-Feb 2008

Daily Rates have increased at an average rate of 8.33% from Jan-Feb 2007 to Jan-Feb 2008

ANIMALS HUNTED FOR THE MONTHS OF FEB–MAR 2008

Based on a sample of 4 businesses.

10.9% of animals hunted during Feb-Mar 2008 included Blesbok, Oryx, and Springbok

9.1% of animals hunted during Feb-Mar 2008 were Red Hartebeest

Animals Hunted
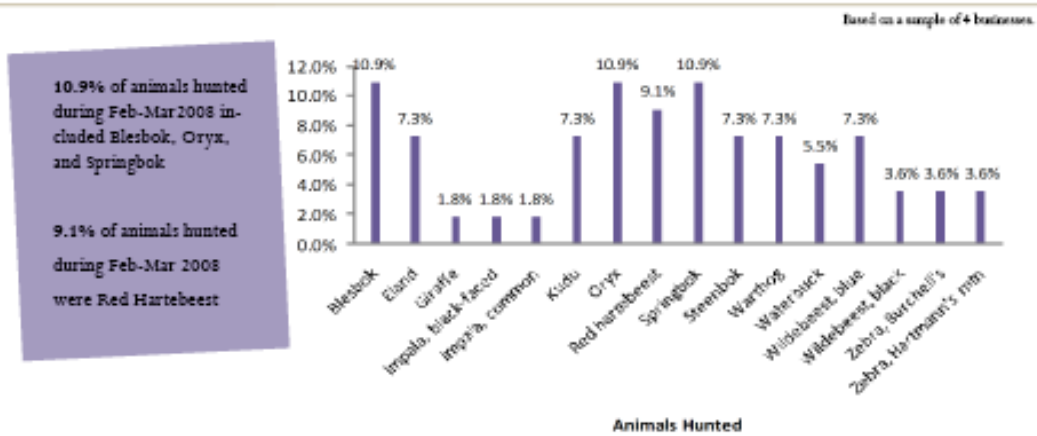
EXPECTED CHANGE IN NUMBER OF CLIENTS:

APR–MAY 2008

Based on a sample of 7 businesses.

0%
43%
57%

■ Increase
■ No Change
■ Decrease
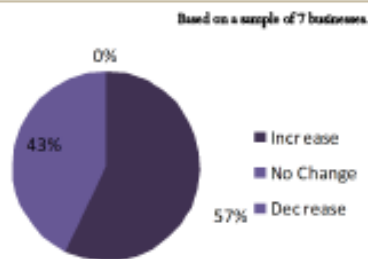
TOP 5 MARKETS TO ENTER

1. Russia
2. Australia
3. Canada
4. Denmark
5. Europe

COUNTRY OF PRESENT RESIDENCE:

FEB–MAR 2008

Based on a sample of 4 businesses.

42%
33%
25%

■ Germany, Switz, Austria
■ Portugal
■ USA & Canada

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April 2008						
	1)South Africa—School Holiday (until 13 April)	2)	3)	4)	5)France—School Holiday (until 28 April)	6)
7)UK—School Holiday (until 13 April)	8)	9)	10)	11)	12)	13)
14)	15)	16)	17)	18)	19) France—School Holiday (until 5 May) Namibia—School Holiday (until 12 May)	20)
21) UK—School Holiday	22)	23)	24)	25) Italy—Liberation Day	26)	27) South Africa—Freedom Day
28) South Africa—Public Holiday	29)	30)				
May 2008						
			1)France, Germany, Italy, Namibia, South Africa—Labour Day	2) South Africa—School Holiday Germany—School Holiday	3)	4)
5) Namibia—Cassinga Day UK—School Holiday	6)	7)	8) France—1945 Victory Day	9) UK—Liberation Day	10)	11) USA—Mothers Day
12)	13) Germany—School Holiday (until 16 May)	14)	15)	16)	17)	18)
19) UK—School Holiday (until 20May)	20)	21)	22)	23)	24)	25) Namibia—Africa Day
26) USA—Memorial Day UK—Spring Bank Holiday	27)	28)	29)	30)	31)	
June 2008						
						1)
2) Italy—Anniversary of the Republic	3)	4)	5)	6)	7) Italy—Summer Break begins (until 15 September)	8)
9)	10)	11)	12)	13)	14)	15) USA—Father's Day
16) South Africa—Youth Day	17)	18)	19) South Africa School Holiday (until 13 July)	20)	21)	22)
23)	24)	25)	26) South Africa School Holiday (until 13 July)	27)	28)	29)

Choosing a Business Panel

- Send an initial E-mail/fax to all registered NTB companies within the four sectors to raise awareness of the barometer and outline its potential benefits to stakeholders.

- Use relevant associations within FENATA, such as HAN, TASA, NAPHA, and CARAN to encourage their members to fill out the TDEFs.

- Develop an incentive strategy to increase participation among businesses to fill out the TDEF.

- Collect as many TDEFs as possible to use for the final panel.

TDEF Distribution

- The TDEF collects data taken over a two month period.

- Distribute the TDEF six times a year at the beginning of these months: January, March, May, July, September, and November.

- Allow two weeks for each company to complete and return the completed TDEF.

- Account for the trophy hunting off-season during December and January when collecting data on the TDEF for this sector.

- Use four E-mail aliases to distribute the TDEFs to the corresponding sectors.

- Use an Excel file attachment to send TDEFs to companies *with* E-mail access.

- Update E-mail addresses for all companies registered.

- Omit companies from the final panel that do not have E-mail access.

TDEF Collection

- Provide companies with an E-mail reminder after one week of distributing the TDEFs.

- The completed TDEF should be downloaded as an Excel file attachment.

- If a company does not properly send back a completed TDEF, an employee should fill out a new TDEF using the information in the E-mail.

Creating the Barometer

- Keep the barometer as concise as possible—one page for every sector, and a front and back.

- The barometer should conform to the following breakdown:

  Page 1: Introduction and All Sectors

  Page 2: Accommodation Sector

  Page 3: Tour & Safari Sector

  Page 4: Vehicle Rental Sector

  Page 5: Trophy Hunting Sector

  Page 6: Additional information

- Provide a list of holidays for the upcoming months, allowing businesses to prepare for large waves of tourists and for marketing purposes.

- Provide a list of the top five markets companies would like to enter, as well as the top five capital investments made by tourism businesses.

Distributing the Barometer

- Distribute the barometer only to companies who have responded with a completed TDEF, as well as the relevant stakeholders.

- Distribute the barometer to relevant stakeholders by E-mail.

Other Recommendations

- Provide free advertising, or other forms of business marketing in the barometer.

- Integrate other sectors of tourism into the barometer.

- Use the accommodation levy forms to provide additional information on the accommodation page of the barometer.

Dear Sir or Madam:

The Namibia Tourism Board is now implementing a tourism barometer that will be published every two months for tourism-related businesses and other relevant stakeholders. Since trends in tourism must be captured on a short-term basis, the barometer will act as a method of reporting the following: (1) past and present trends in the tourism industry, (2) perceived future prospects, (3) market performance by sector, (4) variables influencing changes in a sector's performance, and (5) major capital investments of businesses.

We kindly request your participation in helping the NTB gather data to develop the barometer. Every two months you will receive a Tourism Data Entry Form (TDEF) with questions pertaining to your number of clients, country of present residence of guests, and other questions relating to your business. All of the collected data will be compiled together with other companies, creating a large pool of information. The information submitted on the TDEF will be kept confidential, and your business will not be individually referred to in the barometer. Instead, the barometer seeks to measure different tourism sectors as a whole and track these changes.

We appreciate your cooperation and expect the barometer to provide you with information to improve your business, as well as tourism in Namibia in general. Attached is a sample barometer, allowing you to see the potential benefits of providing information to the NTB through the TDEF.

Regards, The Namibia Tourism Board (NTB)

Hi, my name is _____

I am calling today to speak with a manager or employee about a possible meeting regarding a tourism research project for the Namibia Tourism Board under Sophia Snyman.

Is there a manager that you would be able to refer me to?

Manager/ Employee Answers

Hi, my name is _____

I am conducting a research project to track tourism performance for the Namibia Tourism Board. Our goal is to form a report that will be available every 2 months. This report will contain information such as the different nationalities of clients and market trends in four sectors including Tour & Safari/ Accommodation/ Vehicle rental/ Trophy Hunting.

We would like to set up a 20 minute meeting to discuss how your business collects information from your clients. (Pause) At this meeting, we would like the opportunity to show you the sample business survey we have created. The information from these surveys will be used to form the report.

Yes

I have your address down as _____, is this correct? What would be the best possible date and time to meet?

No

Thank you for taking time to speak with me.

STEP-BY-STEP PROCESS FOR THE DATABASE:

1) Open MS Access 2007.
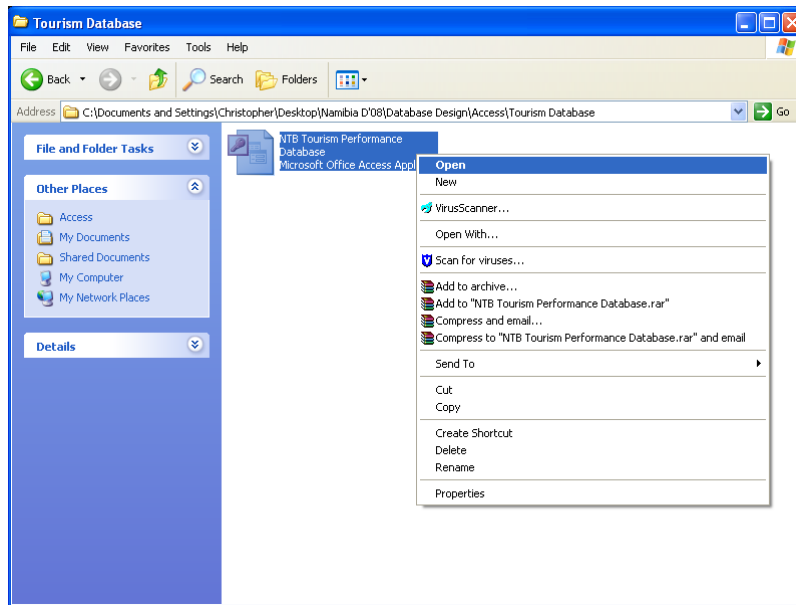
2) If a security warning comes up, click Options…, and select enable this content then click ok.

3) Double click on "Start Up" under the section "Forms" to display Home Page.
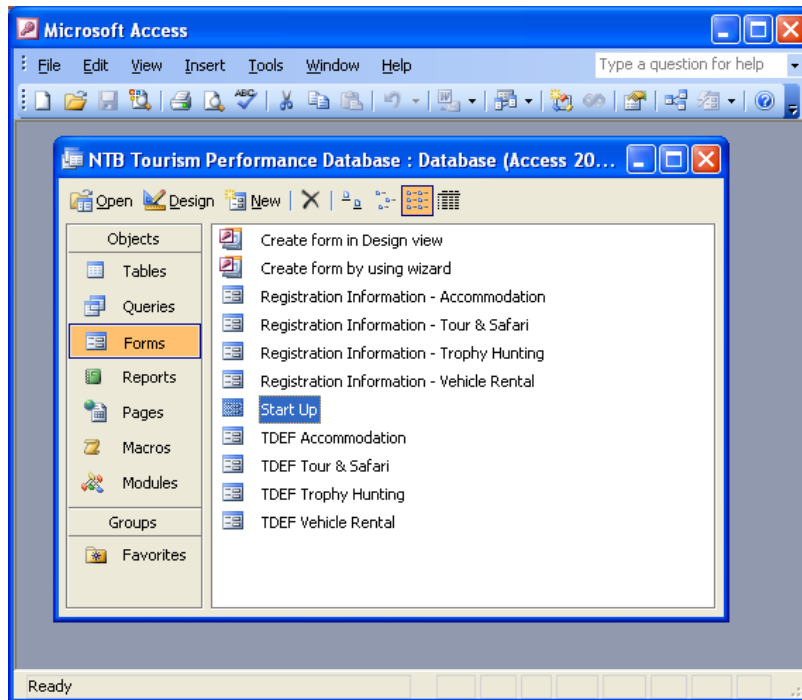
4) Select the desired sector by clicking on the corresponding button.

5) Check whether the selected business named on the completed TDEF is already registered in the database by scrolling through the "Registration Number."

a. If so, scroll to the correct registered business and continue with step 7.

b. If not, continue with step 5.

6) Click the button ▶✳ at the bottom of the screen to create a new business record.

a. Fill in each row with the corresponding data from the TDEF.

Registeration Number

Name of Business

Contact Person

Other Registered Businesses

TDEF Trophy Hunting

Close

Record: |◄| |◄| 29 |►| |►|| |►*| of 29

7) Repeat step 5 until all new business records have been entered.

8) For example, click on **TDEF Trophy Hunting** to display all related TDEFs that belong to the trophy hunting sector.

9) Click the button at the bottom of the screen to start a new TDEF record

   a. Fill in each row with corresponding data from the TDEF.

10) Repeat step 8 until all TDEF records have been entered

11) Click on **Close Trophy Hunting TDEF** when you have completed all the sector-related TDEFs.

12) When all information from a particular sector is complete, click on

   Close to return to home page

13) Select another sector by clicking on the corresponding button and repeat steps 3 to 11.

14) When all information is entered, click **Close** on home page

15) Click the button ☒ in the upper-right corner to close the database.

16) Click ☒ to close program

CHECKLIST FOR CREATING BAROMETER:

MICROSOFT ACCESS→MICROSOFT EXCEL→MICROSOFT PUBLISHER

TO RETRIEVE DATA FROM MICROSOFT ACCESS→EXCEL:

1. Open Microsoft Access 2007.
2. On the main screen, click the Tables tab and open the appropriate table TDEF (ex: TDEF Accommodation) for each sector.
3. A table will open in a new screen.
4. Go to External Data (on the toolbar), Click on Excel, select destination, click OK
   a. Or for Access 2003, go to Tools (on the toolbar), Office Links, Analyze with Microsoft Excel.

CREATING THE GRAPHS IN MICROSOFT EXCEL 2007:

5. From here, graphs can be generated in Microsoft Excel by copying the column of interest and creating a new table for each of the graphs. Below are the graphs that are to be completed for each of the sectors:

Accommodation:

GRAPHS TO INCLUDE:

- Average number of clients based on type of visit (bar graph)
- Expected change in number of clients (for the upcoming 2 months) (pie graph)
- Factors Influencing rack rates (bar graph)

TEXT TO INCLUDE:

- The rate at which rack rates have changed (if they have)
- Also, include a text box explaining every graph

Vehicle Rental and Car Hire:

GRAPHS TO INCLUDE:

- Types of vehicles offered (bar graph)
- Factors influencing rack rates (bar graph)
- Expected change in number of clients (pie graph)

TEXT TO INCLUDE:

- A key for the type of vehicles
- Average number of billed days
- Also, include a text box explaining every graph
- The rate at which rack rates have changed (if they have)

Tour & Safari:

GRAPHS TO INCLUDE:

- Types of tours offered (bar graph)
- Factors influencing rack rates (bar graph)
- Average length of trip (pie graph)
- Expected change in number of clients (pie graph)

TEXT TO INCLUDE:

- The rate at which rack rates have changed (if they have)
- Also, include a text box explaining every graph

Trophy Hunting:

GRAPHS TO INCLUDE:

- Factors influencing daily fees and trophy fees (put on 1 graph) (bar graph)
- Animals hunted (bar graph)
- Expected change in number of clients (pie graph)
- Country of present residence (pie graph)

TEXT TO INCLUDE:

- Change in trophy/daily fees (if they increased, decreased, no change)
- Top 5 markets to enter

- Also, include a text box explaining every graph

6. Use different sheets for the different sectors as well as an "All" category for the information for the first and last page of the barometer.
7. To make a graph, highlight the entire table.
8. Go to Insert→ then select the type of graph (column, line, pie, bar, area, scatter, or other) in the "Chart" category under the insert tab.
9. A graph will appear in the spreadsheet (to check: left-click on the graph and the perimeter of the table in which the graph corresponds to will be highlighted.
   a. To change the colors, click on the Design tab.
   b. Also under the design tab, the format of the graph can be changed, such as including a title and the axis.
   c. Other options for the graph can be changed by right-clicking on the graph or the axis, depending on what needs to be changed.
10. For each graph, there needs to be a title and [n=#] to display the number of responses for each graph; this may change from graph to graph even in the same sector.

CREATING THE BAROMETER IN MICROSOFT PUBLISHER 2007:

11. The basic template for the barometer will be used for every publication.
12. The graphs created in Excel will be imported into Publisher in their designated location.
13. The text that corresponds to the graph will be typed into the textbox nearest to the graph.
14. The following needs to be *changed* for each publication:
    a. The date for the barometer needs to match that of the marking period.
    b. The graphs and text need to be changed for each publication; the barometer template will show where exactly each graph and text should read
       i. Due to the fluctuations in response rate, some graph areas may need to be resized to fit the information
    c. Include the % of respondents on the barometer in its appropriate place on the cover page (ex: if 10% of the entire sector submitted the TDEF).
       i. Can do this for the overall response rate and by sector

     d. For the back page, the upcoming holiday vacations will contain the holidays for the next 4 months; therefore, some of these can remain and some will have to be added and some removed.

15. Make sure that each graph is properly labeled.
     a. Title of graph
     b. Labeled Axis
     c. Number of responses [n=#]

Accommodation Establishments

There are 13 different types of accommodation establishments in Namibia—campsites, guest farms, guest houses, hotels, hotel pensions, lodges, permanent tented camps & tented lodges, and rest camps, camping and caravan parks, resorts, rest camps, and self catering establishments. For a more detailed definition of each type, see Appendix E.

Accommodation Levy Form

A statistical form distributed by the NTB to the registered accommodation establishments every two months. The forms include general information about the accommodation, followed by statistics on the number of beds and rooms sold, and nationality of incoming guests.

Barometer

A method of presenting tourism trends on a short-term basis. The barometer includes charts and graphs, along with brief textual explanations of the figures. Two major examples of organizations using a tourism barometer include the World Tourism Organization and the Scottish Tourism Board.

Car Rental Association of Namibia (CARAN)

A non-profit association consisting of 18 members; its aim is to protect tourists and the car rental industry against sub-standard service and quality.

Federation of Namibian Tourism Associations (FENATA)

A non-profit federation founded in 1992 to bring together private sectors in the Namibian tourism industry to help promote tourism. FENATA works closely with the NTB and the Ministry of Environment and Tourism. It consists of the following 12 associations:
- Air Namibia
- Association of Namibian Travel Agents (ANTA)
- Bed & Breakfast Association of Namibia (B&BA)
- Car Rental Association of Namibia (CARAN)
- Hospitality Association of Namibia (HAN)
- Namibia Community Based Tourism Assistance Trust (NACOBTA)
- Namibian Association of Protected Desert Areas (NAPDA)
- Namibian Professional Hunters Association (NAPHA)
- Namibian Academy for Tourism and Hospitality (NATH)
- Tour Guides Association of Namibia (TAN)
- Tour and Safari Association (TASA)
- Tourism Related Namibian Business Association (TRENABA)

Gross Domestic Product (GDP)

The value of all goods and services produced within a country during a certain time period, most likely a calendar year.

Hospitality Association of Namibia (HAN)

A non-profit organization that works to guarantee the highest quality of standards for Namibian accommodation establishments.

Indicators

Tools used to measure the condition of the tourism industry both quantitatively and qualitatively (i.e. number of beds available).

Microsoft Access

A database management system used to organize vast amounts of data for presentation in documents or reports. See Appendix H.

Microsoft Excel

A spreadsheet program used to input data and generate charts and graphs. Excel was used to create the TDEFs.

Ministry of Environment and Tourism (MET)

The Namibian MET was established in 1990 with a primary responsibility to safeguard Namibia's environmental resources. This governmental agency works to maintain ecological processes and ensure that Namibia's natural resources are being conserved and efficiently used.

The Namibia Economist

A newsletter published every Friday reporting on businesses and marketing trends within Namibia. The *Namibia Economist* presents information relating to market opportunities and other management strategies.

Namibia Tourism Board (NTB)

A Namibian governmental body established in 2000 that promotes Namibian tourism both locally and worldwide. See Appendix A.

Namibian Professional Hunters Association (NAPHA)

A non-profit organization that enhances and maintains an organizational infrastructure that can serve professional hunters, clients, and other groups.

Oxford Economic Forecasting (OEF)

A company formed in 1981 as part of Oxford University's business school to provide economic analysis for companies and governments around the world. The NTB used OEF in 2004 to

develop a database and modeling system to show the Travel & Tourism influence on the Namibian economy.

Trial Panel

The sample of businesses from the four sectors that filled out the prototype TDEF and provided feedback based on its content. This sample was used for the protocol barometer.

Final Panel

The sample of businesses from the four sectors that will fill out the final TDEF, which will be used to formulate the barometer. The final panel may change from month to month, depending on which companies respond.

Revenue per Available Room (revPAR)

The following formula used to calculate performance in the accommodation industry:

Average Daily Room Rate x Occupancy Rate = revPAR

Scottish Tourism Board (STB)

Also known as VisitScotland, the Scottish Tourism Board aims to attract visits by building a successfully brand identity, enhances visitor experience, and works in partnership with the private tourism companies. The STB has also developed a tourism barometer.

Stakeholders

Groups of businesses and organizations that are directly impacted by tourism in Namibia. These stakeholders will receive the barometer, which will provide important economic data relating to their company's goals.

System of National Accounts (SNA)

A system revised by the United Nations in 1993 as a method of reporting and analyzing vast amounts of economic data for a country through consumption, production, and demand variables. The TSA is based off of the SNA.

Tour and Safari Association (TASA)

A non-profit organization that works to guarantee the highest quality of standards for Namibian tour and safari companies.

Tourism Barometer

See barometer.

Tourism Data Entry Form (TDEF)

A spreadsheet used to collect quantitative and qualitative indicator data for an individual business within the four sectors. The TDEF will be available for online completion through E-mail or mail. Information collected from the TDEF is compiled and used to form the tourism barometer.

Tourism Satellite Account (TSA)

A system used to measure the trends in tourism within a given country. Focuses on supply vs. demand variables to form a final report that is presented on a yearly or 6-month basis.

Tourism Satellite Account: Recommended Methodological Framework (TSA: RMF)

A document containing the recommended structure and procedure for the creation of a Tourism Satellite Account. It was developed in 2000 by the Commission of the European Communities (Eurostat), the Organization for Economic Co-operation & Development, the World Tourism Organization, and the United Nations Statistic Division.

Trophy Hunting

A popular activity in Namibia and the surrounding African countries involving domestic or foreign hunters paying a landowner to hunt wild game on their property. Part of the animal is then brought to a taxidermist for processing the animal into a display.

United Nations World Tourism Organization (UNWTO)

A United Nations agency that aims to promote the development of tourism worldwide. Along with the Scottish Tourism Board, the UNWTO produces a quarterly barometer focusing on world tourism.

World Travel & Tourism Council (WTTC)

A collective group of business leaders from a variety of sectors within the tourism industry. The WTTC works to raise the awareness of Travel & Tourism around the world.