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Tourism policy and destination marketing in developing countries: the chain of influence

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ABSTRACT

Tourism marketers including Destination Marketing Organisations (DMOs) and international tour operators play a pivotal role in destination marketing, especially in creating destination images. These images, apparent in tourist brochures, are designed to influence tourist decision-making and behaviour. This paper proposes the concept of a Chain of Influence in destination marketing and image-making, suggesting that the content of marketing materials is influenced by the priorities of those who design these materials, e.g. tour operators and DMOs. A content analysis of 2,000 pictures from DMO and tour operator brochures revealed synergies and divergence between these marketers. The brochure content was then compared to the South African tourism policy, concluding that the dominant factor in the Chain of Influence in the South African context is in fact its organic image.

Keywords: Image; Chain of Influence, Tourism Marketing, Third World, Tourism Policy, South Africa

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1. INTRODUCTION

Destination marketing and image-making play a major role in influencing how tourism is developed in a community (Crompton, 1979; Echtner and Ritchie, 1993). Considering the catalytic role of tourists and their behaviour in determining tourism's impacts, the ramifications of destination marketing and image-making go far beyond the realms of marketing effectiveness, (Baloglu and McCleary, 1999; Jenkins, 1999; Gallarza et al, 2002; Pike, 2002; Beerli and Martin, 2004; O'Leary and Deegan, 2005; Bonn et al, 2005; Wall and Mathieson, 2006; Hunter, 2008). They determine the type of tourists (customers) a destination receives and their behaviour, which in turn will influence the impacts of tourism in a destination community. Image-creation in tourism consists of a number of methods, the most important being marketing communication, within which tourist brochures, advertisements and destination websites dominate (Pennington-Gray et al, 2005). These

are effective tools by which destination marketers can create and promote one or more images that will help influence perception of prospective tourists and achieve their tourism development and marketing objectives. However, the overall direction for a country's tourism development is provided by its tourism policy, which provide the guidelines, strategies and objectives for tourism development (Goeldner and Ritchie, 2009). The tourism policy also provides an overall framework for a country's tourism development so that all private and public sector activities are geared to achieve its tourism policy objectives. The national tourism policy objectives help focus on enabling tourism to help achieve the social and economic development needs of the county such as employment generation, foreign exchange earnings, development of marginal and disadvantaged communities and overall economic development. Reflecting concerns over tourism's impact on society, culture, environment and economy of the destination communities, sustainability has also become a key part of tourism policy objectives.

Destination marketers, i.e. tour operators and Destination Marketing Organisations (DMOs) tend to employ marketing materials to influence potential tourists' decision-making and behaviour in a way that would help fulfil their business objectives (Hunt, 1975: Chon, 1990). The type of tourists and tourist activities targeted are often therefore reflected in the destination image promoted by the marketers. However, images created through marketing materials are not the only sources of information that can influence tourists' decisions and behaviour.   Images are created organically as well, accumulated through personal experiences, word of mouth and one's own learning and thus tend to have greater acceptance by receptors as the emitters are known and trusted sources (Gunn, 1972;

Stepchenkova et al 2007). For this reason, organic images act as a more powerful influence on tourists' decision-making process than other sources of information (Gartner 1993; Hankinson, 2004). Very few destination marketers would find themselves in a position to take advantage of the organic images alone to allure their target markets, especially those tourist destinations that are relatively new. The organic images of newer destinations could often be non-touristic ones and fail to relate to the needs of holidaymakers. Despite their limitations, induced images and destination marketing thus assume major importance in a destination's ability to attract its target audience and thus achieve its tourism development objectives.

However, it has been argued that Third World destinations experience major difficulties in creating favourable destination images and indeed there have been concerns about the portrayal of Third World destinations in international tourism marketing, especially its context and content (Britton, 1979, Cohen, 1993; Silver, 1993, Wilson, 1994, Palmer, 1994, Selwyn 1996; Dann, 1996; Echtner and Prasad, 2003, Bryce, 2007; Dieke 2010). Often there exist stereotypical images of Third World destinations in the Western societies (Bhattacharyya, 1997; Etchner and Prasad, 2003). Besides the stereotypes of poverty and backwardness, the tourism industry produces information that too often depicts places as unreal and demeanng their inhabitants (Britton (1979). With their less attractive organic images and what Britton (1979) and Etchner and Prasd (2003) consider to be a deliberate portrayal of backwardness and decay in international tourism marketing, inducing attractive images pose a major challenge to Third World tourism destinations. Silver (1993) and Echtner and Prasad (2003) noted that there exists in parallel with the image of a struggling developing world, a glamorised version where tourists from the affluent First World can

indulge in luxury and "rediscover" the unknown. These authors maintained that the portrayal of developing countries in tourism marketing is reminiscent of a colonial attitude towards the Third World. Their collective assumption was that Third World tourism marketing, particularly where this is aimed at potential visitors from First World, has been and is still dominated by the views of First World tour operators. Stepchenkova et al (2007) made a similar comment in the context of the image of both China and Russia promoted to an American market. While local DMOs may strive to present less standardised images, at least to the international market, in many cases the websites of individual enterprises show marked similarities in their imagery to both their competitors and to Western or international tour operator brochures.

At least until the emergence of the World Wide Web (WWW), many Western tourists had little or no access to the promotional materials produced by Third World DMOs and had to rely primarily on information provided by tour operators in the source market. However, Internet as a popular source of information is a mixed blessing to Third World destinations. While providing an effective medium to communicate with potential target markets, the Internet could also be a source of information that may not always be in tune with what the destination marketers want the outside world to see. As Dwivedi (2009) argues the Internet allow consumers not only to perceive destination images depicted by destination marketers but also to construct and share their own images of the destination based on information they find on non-touristic websites. As a consequence destination marketers would find their induced images contested.

Given the fact that tour operators are driven by their own corporate business objectives, their portrayal of Third World destinations is always likely to be closely aligned to achieving their own goals which may not be identical to those of the destinations. On the other hand, tourism development and destination marketing activities of DMOs are driven by the development imperatives of these destination communities and in many cases those of national economies (Dieke 2010). This would suggest that it is likely there could be an "image divide" between the way in which First World tour operators and the Third World DMOs portray the same destination. DMOs often try to portray destinations in ways that are compatible with their tourism development objectives while tour operators portray destinations in ways that are best suited to meet their commercial offerings. The customers' perceptions of tourism destinations are determined by the effectiveness and reach of these destination marketers. However, the power relations between tour operators and destinations seem always to favour the former. As gatekeepers of tourism destination, coordinators of tourism products, and key manipulators of tourism origin-destination flows, tour operators have considerable influence on destinations' success and failure, placing them at a disadvantage (Ionnides, 1998). Given the spatial and cultural proximity that tour operators in the source market have to their consumers, they have an advantage when it comes to reaching potential customers, especially compared to DMOs located in the Third World. It is argued that congruence of images promoted by the DMOs and tour operators, and tourism policy objectives could contribute to the competitiveness and sustainability of tourism destinations. Moreover, as Singh and Lee (2009) argue, consistency in messages and destination image can have a positive influence on consumers' perceptions and develop loyalty towards the destination.

The objective of this paper is to explore this image divide in destination marketing and to propose the concept of a Chain of Influence, illustrating it through a review of literature and the application of the concept to South African tourism marketing. A content analysis (Gallarza et al, 2002; Hunter 2008) of tourist brochures of South African DMOs and British tour operators was conducted to analyse the potential image divide between the two and to consider the nature of the chain of influence

2. IMAGE IN DESTINATION MARKETING

The way in which tourists and non-tourists view a destination is often ascribed to its image (Crompton, 1979). Destination image has been most frequently discussed and researched in relation to how tourists perceive the destination and how the image influences the tourist's decision-making process (Gartner 1993; Pike, 2002; White, 2005). Image has an undeniable influence on tourist behaviour too (Baloglu and McCleary, 1999; Beerli and Martin, 2004; Bonn et al, 2005; Gallarza et al, 2002; Jenkins, 1999; O'Leary and Deegan, 2005; Pike, 2002). How DMOs wish to portray destinations and how inbound tourism is envisioned by national tourism planners is often overlooked in destination image studies. Awaritefe (2004) argued that destination marketers place most emphasis on appealing to what they believe tourists want, an action supported by the aforementioned research focussing on the role of destination image in tourist decision-making and Santos (2006) noted how travel writers tended to describe as "best" images of destinations in comparison

to American society. Laws et al (2002) argued that most destination image studies

disregard the host community and Tapachai and Waryszak (2000) discussed the role of

what they described as 'beneficial images' in influencing potential tourists to select specific

destinations.

In studying destination image as an element of marketing, it is important to focus on

induced images, which are deliberate attempts by the travel trade and DMOs to develop a

destination image that matches their development, objectives (Gunn, 1972), which confirms

the view that perceptions gained from organic or personal sources can be changed through

marketing communication (Anderdeck, 2005). However, destination marketers can control

the induced images of a destination only to a certain extent and have to deal as well with

the organic images and tourists' personal experiences. Beerli and Martin (2004) argue that

there are nine factors that can influence destination images: natural resources, general

infrastructure, tourist infrastructure, tourist leisure and recreation, culture, history and art,

political and economic factors, natural environment, social environment and the atmosphere

of the place. These dimensions can be summarised into five "A's": attractions, actors,

actions/activities, atmosphere and amenities Prayag and Ryan (2011) noted that nationality

also appears to be a factor in the context of 'push' and 'pull' aspects of a destination's

image to potential visitors.

Britton (1979) started the debate on underlying themes in Third World tourism marketing.

He detected attempts to portray them as "unreal" or "Disney-like", stressing "foreignness"

yet highlighting Western comforts, the stereotypical portrayal of locals as "props",

reference to the locals' "poor but happy lives" and finally the sexual appeal of exotic locals. Likewise, Echtner and Prasad (2003) themed the portrayal of the Third World as the myths of "the unchanged", "the unrestrained" and "the uncivilized", arguing that the marketing of Third World destinations is still governed by colonial attitudes by which the superiority of the West is reinforced.

In referring to Gunn's work on image, Britton (1979) argued that if organic images form the strongest base of tourist decision-making, then the Third World, which has not enjoyed the most favourable press in Western markets, could only rely on induced images to correct these misgivings. The "dangerous" image of some developing countries re-enforced by travel advisories issued by Western governments have been a long-standing concern of African nations (WTO, 2004). This apparent "one-sidedness" of Third World tourism images has caused great concern in Third World countries and among postcolonial scholars. However, both Britton (1979) and Echtner and Prasad (2003) failed to examine the way in which Third World DMOs attempted to promote their own destinations, in particular whether DMOs of developing countries portrayed a different image to that promoted by Western tour operators and whether the financial power of the latter alone was instrumental in overshadowing local attempts to alter organic destination images. McGregor (2000) noted the dynamic aspect of both text and images viewed under the 'tourist gaze' and Hunter's (2008) work on a typology of photographic images pointed out how the portrayal of specific chosen sites involved a range of approaches.

Destination marketing needs to be closely related to the way in which tourism is planned, i.e. it is one of the tools to realise the objectives of tourism policies. Burns (1999) identified two paradoxical approaches in tourism planning - a) The "Tourism First" approach with stress on tourism growth and; b) the "Development First" approach emphasising tourism's role in the overall community development. The continuing popularity of tourism as an agent of development in the Third World has been widely recognised (Opperman and Chon, 1997; Sharpley and Telfer, 2002; Azarya, 2004; Van der Duim et al, 2005), yet tourism growth, as reflected in increased tourist numbers does not automatically stimulate socioeconomic development and regeneration in the Third World. Although many developing countries have experienced a quantifiable success in tourism, recent years have seen attempts to incorporate more sustainable socioeconomic goals in their tourism policies (Burns, 1999; Scheyvens, 2002; Handszuh, 2008)

Laws et al (2002) argue that the selection of which aspects of a destination to feature in the market place depends on the destination's special advantages or attributes as well as understanding how to entice the types of tourists that the destination hopes to attract. Cooper et al (2005) and Dore and Crouch (2003) consider destination marketing as the principal responsibility of a DMO. The DMOs' marketing planning process in turn follows from the objectives of the tourism policy. Papadopoulos (1989) suggests DMOs should ask: "Where do we want tourism to go? How do we get there?" The answers to these questions should be found in the national tourism policy, confirming the influence of tourism policy on DMOs' marketing plans.

The travel trade in the source markets (most notably Western ones) plays a major part in marketing a destination through brochures, websites and personal recommendation Silver (1993) argues that tour operators play a pivotal role in marketing destinations for which information is not readily available otherwise. Such remote destinations are often perceived as primitive due to their organic images - therefore tourists want to see the primitive and tour operators, often having equally limited experience of these destinations, oblige, at least in their offerings. Ryan and Cave (2005: 143) however, argue that "images may be both specific to place and characteristics of respondents." and that cognition influences both image complexity and the response of potential visitors. Silver (1993:305) also places the marketing actions of First World tour operators in a colonial context by arguing that "touristic [sic] representations… often portray the notion that natives exist primarily for the consumption of Western tourists." Whereas most DMOs are led by tourism policies, most tour operators are driven by their own business objectives, which may be different from or incompatible with benefits desired by the host community.

Further concern about the content and context of Third World tourism marketing originates from tour operators' excessive use of iconic or stereotypical pictures in brochures (Cohen, 1993). As Becken (2005) argues, tour operators use icons to attract attention because tourists who instantly recognise the icon are more likely to purchase that product. Visual portrayal of destinations is a common method applied to induce images and provides what is probably the most appropriate instrument by which to understand the principal approaches to portraying the Third World in international tourism.

Beerli and Martin (2004) are two authors who support the notion that DMOs should develop a relationship with relevant intermediaries and ensure that the message transmitted by the trade corresponds with the image desired by DMOs, while Morgan et al (2003) argue for the inclusion of all stakeholders in such relationships. Riege and Perry (2000) go to the extent of suggesting that DMOs should involve the foreign trade directly in tourism development and marketing. In doing so, DMOs could impress an image on the tour operator, which could lead to the latter's marketing material being in synergy with that of the DMO. This is important considering the prominent role played by the travel trade in source markets in promoting Third World destinations (Echtner and Prasad, 2003; Silver, 1993, Britton, 1979), especially those destinations for which limited alternative information is available (Silver, 1993). Blain et al (2005) stress the importance of including a wide range of views including those of DMOs and other stakeholders in creating a brand image for a destination.

Inaccurate notions and patronising images portrayed by tour operators are common in marketing material. Like all marketers, DMOs try to portray their destinations in a very attractive manner (Britton, 1979; MacKay and Fesenmaier, 2000) often going to the extent of exaggeration. Ensuring a balanced image that reflects the realities and matches the tourism development objectives as enunciated in tourism policies is a major challenge confronting both the public and private sectors in the tourism industry. Achievement of this balance could lead to synergies in destination marketing, clarity of destination images and in rationalising marketing budgets.

To summarise, there should exist a link between a destination's tourism policy and the marketing activities of DMOs and the travel trade, which the authors describe as the Chain of Influence in destination marketing, in which creating images form a manor part.

2.1. Chain of Influence

The concept of a Chain of Influence in destination marketing originates from the assumption that the content of destination marketing material reflects the business objectives of destination marketers. Taking the example of a tour operator's brochure, it could be argued that the tour operator's primary objective in designing the brochure is to generate maximum return on its investments by encouraging potential tourists to visit the destination it promotes and to use its services. The result would be brochure contents that would appeal to its desired market segments, thus helping it maximise custom and profit. What seems to be obvious here is a Chain of Influence trickling down from the tour operator's business objectives, through brochure material to the type of tourist attracted to the destination, i.e., the tour operator's target market.

On the other hand, DMOs are set up in most instances as a direct tourism policy outcome and their remit is to help achieve o national tourism policy objectives (Frost and Shanka, 2001; Ritchie and Crouch, 2003). An overview of national tourism policies indicate they often include objectives such as the socioeconomic development, employment creation and development of peripheral areas, and are increasingly directed towards achieving sustainable tourism development in the long term (Dieke, 2010). Consequently, the DMOs

target those visitors who could contribute towards achieving the national tourism policy objectives (Presenza et al, 2005). Examples include Bhutan's strategy of setting an annual quota for overseas visitors and targeting low-volume high-value tourists to ensure that the country's limited carrying capacity is not threatened by large tourist numbers (Tourism Council of Bhutan, 2011; Reinfeld, 2003). DMO's promotional efforts are put in place after the strategic marketing planning activities of target market selection, image definition, branding, and positioning have been completed (Presenza et al, 2005; Papadopoulos, 1989). The strategic marketing plans are normally directly linked to national tourism policy objectives enunciated by the national tourism organizations (NTO) (Papadopoulos, 1989). A Chain of Influence thus exists between a destination's tourism development objectives and its DMO's brochure content, with the ultimate aim of attracting its desired types of tourists who would help achieve the policy objectives.

Figure one illustrates this Positive Chain of Influence, advocating a sustainable tourism approach. In this model, the dominant element influencing destination marketing and image, and subsequently the type of tourism to a destination are a tourism destination's policy objectives. It is suggested that promotional material developed by DMOs and foreign tour operators in synergy with such a tourism policy would attract tourists who are most likely to help achieve those objectives. Success in attracting the target market could lead to a more sustainable tourism industry at the destination, hence the reference to this model as "positive".

Insert Figure one: 'The Positive Chain of Influence' here

However, a Negative Chain of Influence could also exist. In this model (Figure two) the assumed needs of the tourists and the commercial imperatives of tour operators dictate the content of tourism marketing and the destination images portrayed, and in the process the tourism policy objectives may be ignored or contradicted. If brochures are predominantly designed to promote values in opposition to the national tourism policy, this could result in the total irrelevance of the tourism policy objectives with the potential for negative impacts of tourism with little benefit accruing to the local community, i.e. unsustainable tourism. These two extreme poles of the Chain of Influence do not imply that tour operators promote tourism deliberately to the detriment of the host community nor does it suggest that DMOs always act responsibly in destination marketing.

Insert Figure two: 'The Negative Chain of Influence' here

In determining which type of chain is dominant, it is important to compare the content of the tourism marketing material of DMOs and tour operators. Synergy between the portrayed image and the destination's tourism policy objectives would reveal a Positive Chain of Influence, which would contribute towards making the socio-economic benefits of tourism more achievable. However, if the brochure content departs from the objectives of the tourism policy, questions are likely arise as to what are the real benefits and who are the beneficiaries of developing tourism in the destination community. A perfect Positive Chain of Influence may be unrealistic in the modern consumer-driven market, however, closer link between tourism policy objectives and destination image is essential not only to make tourism a key variable in the socio-economic development of destination communities. As

Britton (1979:326) argued, "the effort might begin with an explanation of the receiving countries' tourism objectives. The metropolitan industry must understand that the activity is not incidental or undertaken merely for the benefit of travel firms and their clientele, but is part of the development strategy."

Having introduced the concept of a Chain of Influence in tourism marketing, the next section examines this within the context of the marketing of South Africa.

3. TOURISM IN SOUTH AFRICA

After the end of Apartheid in 1994, South Africa seems to have found a new multicultural identity, which is evident also in tourism marketing. Whilst tourism did not show any significant growth until 1994, it has become an important economic agent and vehicle for social development in the new democratic South Africa. The South African tourism industry showed phenomenal growth with visitor arrivals increasing from 3.6 million tourists in 1994 to 9.9 million in 2009 (SATSRU, 2011), which was fuelled by the addition of international air routes and events such as the 1995 Rugby World Cup and the Cricket World Cup in 2003 . This significant growth in foreign tourist numbers sent a wave of excitement throughout the country, especially rural areas which historically had depended on farming and hosted a large majority of impoverished and often unemployed citizens (Dieke, 2008).

The twenty fourth most popular tourism destination in the world (WTO, 2009), South Africa is the overt tourist hub of Sub-Saharan Africa. With world-class airport facilities, served by over forty airlines (including South African Airways (SAA)) many barriers in the European perception of the country and its infrastructure have been removed. The Department of Environmental Affairs and Tourism (DEAT) (1996) identified the broadest elements of its product as accessible wildlife, varied scenery, unspoilt wilderness areas, diverse cultures (emphasising traditional African cultures), sunny climate, no "jet-leg" from Europe, good infrastructure, unlimited potential for specialised activities such as adventure holidays, unique archaeological sites and battlefields, good conference facilities, good communication and medical services, and well known iconic attractions such as Table Mountain, Sun City and Kruger National Park.

In 1996 the White Paper on the Development and Promotion of Tourism in South Africa was launched (hereafter referred to as the White Paper of 1996). It served as a policy framework for tourism development in South Africa, providing a blueprint for tourism planning and highlighting the objectives that the government and South African Tourism (SATOUR, nowadays abbreviated as SAT) wished to achieve (Dieke 2010). Its vision and objectives, including specific financial and tourist targets, display what is typical of Burns' (1999) "Development First" approach to tourism. South African Tourism's vision is to establish South Africa as the world's preferred tourist destination by focussing on international markets, and to spread the economic benefits of tourism across South Africa. The main objectives of the White Paper of 1996 are summarised in Table one.

Insert Table one 'Summary of the main objectives of the White Paper of 1996' here

South Africa possesses the natural and cultural assets to become one of the world's top destinations. It is also clear that tourism as an economic and developmental agent enjoys a favourable position with the public, private and voluntary sectors (Visser and Rogerson 2004), and peripheral regional authorities still grant tourism a very high priority on the economical and social agenda (Eden District Municipality, 2006). This should indicate to tourism planners and marketers that, given the uniqueness of the country's tourism product and a growing demand, the objectives of the White Paper of 1996 are not unattainable. SAT has been very active in training of international tour operators in the main source countries in an attempt to synchronise their marketing activities. According to a study by Wynne et al (2001), Europeans visiting South Africa relied more on promotional sources than word-of-mouth in choosing their holiday destinations. The main strategy of SAT was the formulation of the Fundi (meaning "specialist") program which is an online training course for travel agents (SATSRU, 2009).   A more ambitious element of SAT's trade-relations strategy has been the organisation of familiarisation trips in partnership with the private sector, especially SAA which is partly government owned, incoming tour operators and local hotels. In 2004 SAT and its private sector partners organised familiarisation trips for 200 UK based travel agents alone with another familiarisation trip for African agents successfully completed in October 2006 (Businessday, 2006). Given the relatively recent emergence of South Africa as a mainstream tourism destination and SAT's initiatives to engage with tour operators in major source markets, makes it a suitable case to analyse the chain of influence in destination marketing. Moreover, as a developing country, South

Africa's public sector and policy initiatives have resulted in an impressive increase in the volume and value of its tourism, which also add to the pertinence of the country to study the link between its tourism policy and marketing activities.

4. METHODOLOGY

For the purpose of this research, a content analysis of promotional material (Gallarza et al, 2002) seemed most appropriate. According to Hudson and Miller (2005:135) "content analysis uses an objective, systematic approach to measure the meaning of communicated material through the classification and evaluation of selected words, themes and concepts". The content analysis technique is useful in analysing and comparing the pictorial and textual content of promotional material produced by DMOs and tour operators (Hunter, 2008).

The first stage of the research involved scrutinising the White Paper of 1996 in order to arrive at a more complete understanding of South Africa's tourism ambitions, goals and objectives. Since neither tour operators nor DMOs appear to have much control over world politics, media coverage and word-of-mouth of a largely heterogeneous pool of potential tourists, their power of influence rests in the induced images they choose to portray of destinations by way of paid advertising such as tourist brochures. Tourist brochures do constitute one of the most effective and popular promotional and information sources employed by both tour operators and DMOs (Pennington-Gray et al, 2005). As a printed promotional and information tool designed to communicate with existing and potential tourists, brochures play a pivotal role in forming induced image (Sirakaya and Sonmez

2000; Molina and Esteban, 2006). A visit to high street tour operators, DMO information centers and major tourism fairs further underline the ubiquitous nature of brochures as a key promotional resource in tourism. Content analysis of tour brochures provides an effective method to understand the type of images that its creators intend to project (Molina and Esteban, 2006; Hanlan and Kelly, 2005; Echtner and Prasad, 2003). For the purpose of this research a comparative content analysis of 1,000 pictures used in 16 recent brochures on South Africa by British tour operators (promoting tours to South Africa) with 1,000 pictures from nine recent brochures produced by South African national and provincial tourism marketers was carried out. The two geographical origins of the brochures were chosen for the following reasons: Britain represents a "developed" source market whereas South Africa is a "developing destination nation";. Given the colonial links between the two countries, British market is likely to have a greater affinity towards its ex-colony, and most importantly, Britain is South Africa's most valuable and largest international source market (SATSRU, 2010) . Please see table-1 for details of tour operators and the brochures used for the content analysis

Insert Table 2 here

The content of these were categorised and analysed following procedures used in other studies (e.g. Henderson, 2001; Echtner, 2002; Echtner and Prasad, 2003; and Hudson and Miller, 2005). A total of twenty five brochures from tour operators and 18 from DMOs were collected for analysis, disregarding those lacking pictures or with duplication. The researchers attempted to include the widest possible range of content, including pictures of multi-national as well as niche market operators. The final sample consisted of 16 tour operator brochures and nine from South African DMOs, from which a total of one thousand

pictures each were available for the content analysis. Echtner (2002) used a "four A" (Attraction, Actors, Actions and Atmosphere) method to analyse the content of Third World tourism marketing materials, which helped identify patterns of representation used. This method was adapted for the current research, and a fifth 'A' was added to include amenities, referring to accommodation, transport and other tourist infrastructure. It is argued that the portrayal of tourist amenities can greatly influence the overall destination image (Beerli and Martin, 2004). These "five A's" represent attributes of a destination which would aid in inducing destination image.

Clear criteria were set for each category of pictures. The category "attractions" was subdivided into man-made, natural, cultural, wildlife, urban, rural, iconic and alternative. Portrayal of cultural attractions included reference to tribal cultures, way of life, cuisine and religion, excluding pictures of museums and monuments, which were, classified as man-made attractions (Witz et al, 2001). Pictures of iconic South African features only included those, which were immediately recognisable as uniquely South African such as Table Mountain, Nelson Mandela and the national flag. Alternative attractions included those products, which are not yet widely known as uniquely South African yet has the potential to become iconic such as Route 62, Cape Agulhas and the Sterkfontein Caves. Many pictures portrayed multiple different attractions and were therefore categorised more than once.

The category referring to "actors" was subdivided into hosts and guests. Pictures of locals were further categorised according to their actions (daily life, posing, engaged in tourism,

employed in tourism) and cultural background (Black, Coloured, Asian and White). Pictures of foreign tourists were classified as leisure and business and the same ethnic categorisation as for the hosts was applied.

Pictures depicting "actions" were categorised to summarise the main activities and forms of tourism promoted in the marketing material. Categories used were game-viewing, interaction with animals, beach, land-based sport (including golf, surfing and athletics), adventure sport (including abseiling, hang-gliding and rafting), relaxation (including pictorial references to swimming pools and sun-lounging), sightseeing (including reference to museums and monuments), music/theatre, dining and shopping/nightlife (including traditional markets and crafts).

Pictures depicting "atmosphere" were subdivided into luxury vs. budget (only photos that clearly portrayed one or the other were included), the use of bright (orange, red, yellow and deep blue and greens) vs. dull colours (pastels, brown, white and grey), sunny (only if blue sky was visible) vs. cloudy, as well as pictures depicting smiling residents/guests and referring to health and safety.

For "amenities", pictures were divided into three main categories: accommodation, transport and restaurants/clubs. In summarising pictures portraying accommodation, differentiation was made between international chains (including South African chains with overseas properties), local luxury hotels, local standard hotels (used mostly by domestic tourists) and alternative accommodation (including camp sites, home stays and

backpacker lodges). Transportation was subdivided into pictures of international airlines vs. local airlines, rail, public transportation (including coaches, minibuses and taxis) and roads. Finally restaurant and club facilities were categorised as up-market, local standard, within accommodation establishments and alternative (including picnics).

Prior to the formal grouping of pictures, the researchers analysed a DMO and a tour operator brochure to ensure that all pictures could be classified according to these categories. Another trial of classification of pictures was conducted in the presence of a South African and a British national in order to gather wider views and interpretations of pictures, ensuring consistency of classification throughout.

5. FINDINGS

The researchers acknowledge that in delivering a critique of the content of tourism brochures, the emphasis should be on balance: a brochure of higher quality would be expected to depict as wide a range of attractions, actors, activities and amenities of the destination as possible. When comparing the pictorial content of tour operator and DMO brochures, any difference of 10% or less in pictorial contents was deemed to constitute synergy, with a difference of 50% or more constituting a gross disparity.

According to the South African tourism policy the most desirable tourist to South Africa is someone who is inherently responsible towards the environment and different cultures in his/her conduct. It is also a tourist who would integrate with South African society, i.e. purchase goods from local shops, use locally owned accommodation, experience locally-

flavoured dining and purchase souvenirs from local entrepreneurs. It is a tourist who is

eager to learn about South African culture, support local arts and music, stay for a good

length of time and spend a considerable amount of money.   How this differs from the

tourist targeted in marketing material becomes evident in the content analysis.

The first noticeable divergences are found in the amount of emphasis placed on various

elements of the South African tourism product. DMOs placed more emphasis on

attractions, actors and diverse activities than on amenities, whereas the latter dominates the

pictures in most tour operator brochures. It can be argued that DMO brochures embraced

the diverse tourism product in line with the national tourism policy while tour operators'

appeared to place emphasis on amenities and creature comforts, possibly in an attempt to

project an 'ecological bubble' (Cohen, 1972).

As evident in Figure Three, a total of 754 photos in DMO brochures depicted attractions.

Of these 19.8% were man-made, 30.1% natural, 27.5% cultural and 22.7% wildlife.

Seventeen and a half percent of pictures depicted urban areas and 29.2% rural areas.

Lastly, 6.2% of pictures promoted iconic images with 2.4% depicting alternative tourism

attractions.

Tour operators promoted natural attractions to a large extent (48%), whereas DMOs, in line

with the tourism policy, promoted more culturally orientated attractions (27.5%). Tour

operators also put more emphasis on iconic South African features than the DMO, which, it

appears, attempted to encourage a wider geographical spread of attractions with less emphasis on heavy use of iconic images.

Insert Figure three 'Portrayals of Attractions in Tour Operator and DMO Brochures' here

The tourism policy stressed the involvement of 'previously disadvantaged' citizens (in the local context all non-white citizens). Tour operators often portrayed them serving guests, with limited emphasis on their daily life. While there seems to be synergy in the ethnicity of the host nation, their actions portrayed are not corresponding in DMO and tour operator brochures. Figure four provides a graphical representation of the way in which South African nationals were portrayed in both types of brochure. Their cultural composition is summarised in Figure Five, showing that both DMOs and tour operators placed more emphasis on black Africans in the brochures.

Insert Figure four 'Brochures' Depiction of Hosts According to Their Actions' here

Over eighty percent (84.6%) of guests depicted by tour operators however, were white, 1.1% black and 14.3% depicted a mixture of cultural backgrounds. Of the 219 pictures of foreign guests used by DMOs, 74.4% were white, 3.7% black and 21.9% of various ethnic backgrounds. This racial mix represents the profile of the UK tourists to South Africa and is indicative of the target market that both DMOs and tour operators (TO) were interested in. Images of foreign tourists tend to focus more on leisure activities (98% in TO brochure and 97.3% in DMO brochure).

Insert Figure five 'Brochures' Depiction of Hosts According to Their Cultural Backgrounds' here

The activities engaged in at destinations are another area where noticeable divergence exists between tour operator and DMO brochures. The former's brochures devoted more than half of all pictures related to relaxation while DMO brochures revealed a more diverse set of activities available. Although this can appear as offering "everything for everyone", it is more in synergy with the tourism policy.

Insert Figure six 'Tour Operator Pictures Depicting Actions/Tourism Activities' here

A total of 347 (46.4%) pictures were used by British tour operators that depicted actions/ activities (Figure Six), while DMOs devoted 464 (89.9%) pictures to this category (Figure Seven).

Insert Figure seven 'DMO Pictures Depicting Actions/Tourism Activities' here

The images depicting amenities revealed the largest divergence in the number of pictures that tour operators devoted to this element of the destination. A total of 633 photos used by tour operators, depicted tourism amenities of which 526 were of hotels, sixty two devoted to transport and forty five to restaurants. DMOs in contrast had only 138 pictures of the amenities with Forty-two pictures portraying hotels, fifty pictures depicting transport, and forty-six pictures of restaurants. While this in itself is cause for an image divide between

DMO and tour operator brochures, overall however, locally owned establishments were predominantly portrayed by both sources, in synergy with the tourism policy. This difference could be due to the fact that the DMOs are promoting a destination whereas the tour operators are selling a product, a significant part of which consist of the standard of infrastructure and superstructure that is available. Moreover, in order to sell the tour packages, the tour operators have to provide substantial information on the amenities to assure visitors of a comfortable holiday. Table two provides a summary of the occurrence of "amenity" pictures in both types of brochure.

Insert Table three 'Depiction of Tourism Amenities' here

The area where there is most similarity is in the depiction of the atmosphere of South Africa. Tour operators portray a more a luxurious picture of the country compared to the DMO, especially in the case of accommodation provision. As most of the luxurious properties are located within easy access of the main gateway cities, the portrayal of luxury do not reflect the realities of rural poverty (Terreblanche, 2002) and fail to promote rural development, which is one of the tourism policy objectives (Visser et al 2004). The reluctance on the part of tour operators to portray and promote rural areas in brochures adequately would indicate divergence between tourism policy objectives and tour operators' priorities, which would imply a Negative Chain of Influence.. Achieving the goal of rural development through tourism would require South African DMO to develop a incentive scheme targeting tourism development in the rural areas (Ward, 1989; Jenkins, 1982) .

6. DISCUSSION

This categorisation and analysis of pictures has aided in revealing the different ways in which South African tourism is portrayed. More importantly, it helped reveal whether tourists, who have access to both types of brochure in Britain, are receiving a consistent message about South Africa as a destination. Whether this image is in synergy with South Africa's tourism policy, i.e. what or who dominates the Chain of Influence is the next logical question.

DMOs appear to have made a conscious effort to embrace the objectives of the tourism policy and their brochure images are mostly in synergy with this. They put emphasis on local culture and the natural environment appealing to tourists who would appreciate both, and also highlighted a wide range of tourist activities and local products and services, welcoming tourists who would integrate with South Africans and experience the destination to its fullness. DMOs promoted rural areas and covered a greater collection of tourism destinations within South Africa than did the brochures of tour operators. In these aspects, DMO brochures were true messengers of the national tourism policy. One clear message from DMO brochures is that the South African tourism product is diverse and that the emphasis throughout is on what the destination has to offer, what South African life is about and how tourists can integrate with local establishments and people. However, even though much emphasis in the White Paper and DMO brochures was placed on black South Africans, South Africa is a multi-cultural destination and the absence of Asian communities

and the small amount of attention given to the Cape Coloured people and Bushmen (both unique to South Africa),would only reduce the diversity of the country's tourism product. Successful promotional activities of countries such as Malaysia that celebrates their diversity through campaigns such as 'Malaysia Truly Asia' provide examples of good practice for South African tourism.

In contrast, British tour operator brochures have portrayed South Africa as a sunny destination for white tourists travelling in luxury with all the necessities available in a resort. They put little emphasis on cultural attractions and tourist activities, although both wildlife and locals are portrayed with respect and dignity. The portrayal of amenities by tour operators suggests that South Africa is suitable for those wanting high quality relaxation whilst enjoying the wild African bush in close proximity. Tour operators throughout appear to have taken great efforts to highlight South Africa's natural treasures alongside its tourist infrastructure – sometimes manipulating pictures so as to place certain attractions in close proximity to hotels which in reality is inaccurate, evocative of Britton's (1979) criticism of First World tour operators' Disney-like portrayal of developing countries. The tour operator's portrayal of South Africa, thus, support their business objective of promoting a product that appeal to their target market in terms of comfort, security, novelty and conform to Echtner and Prasad's (2003) three myths in Third World tourism marketing, viz. the myths of unchanged, unrestrained, and uncivilised.

 Reports on various incidents of crime in South Africa appear quite frequently in the media (e.g. Wines, 2007; Dynes, 2003; Rohrer 2010; Sapa, 2010; Independent Online, 2010), and

consequently, the country is perceived as a dangerous place where tourists and the local people can be subjected to violence, crime, petty theft, car-jacking and murder. Even as recently as August 2007, tourism officials and politicians called emergency meetings in Cape Town to deal with eighteen different reported incidences of crime against tourists on Table Mountain alone (Lamprecht, 2007). This is part of South Africa's organic international image and subsequently one of the aspects of destination image that tourism marketers have no control over and can only moderate through the use of induced images. A major challenge in marketing South African tourism is how to reduce the organic image of South Africa as a society with high levels of crime and make it closer to the image envisioned in the tourism policy through a comprehensive marketing communication strategy (Tilson and Stacks, 1997; Witz et al 2001)

The DMOs' approach to override the organic image of South Africa as a dangerous destination is apparent by their way of using more pictures depicting daily South African life, different cultures, friendly people, a variety of activities, the use of public transport, rural areas – all images that relay a message inviting tourists to a "safe" society where it is easy to integrate and safe to travel, thus sidelining the issue of tourists' security. DMOs cannot be blamed for attempting to promote such an attractive image of South Africa given the importance of positive images of destinations to visitation (Tapachai, and Waryszak, 2000) and the pivotal role that DMOs play in destination promotion. However, it can have serious implications to the quality of tourist experiences, given the mismatch between the image projected and the realities of today's South African society.

British tour operators also tend to side-step the security aspect of South Africa's destination image and try to portray the country as crime-free, *as long as one stays in one's hotel.* The resorts are represented as havens of luxury where tourists are safe and which they do not need to leave to see the country. The foreign trade thus tends to ignore the host community, depriving it of vital interaction with tourists and consequent commercial benefits. By resorting to this practice, the travel trade contributes to a reinforcement of the impression about South Africa as an unsafe destination, which indicates a major departure from the national tourism policy objectives, indicating a disconnect.

The analysis indicate an image gap between DMO and tour operator. These gaps pose a major challenge to achieving competitiveness for the South African tourism. This is by no means unique to South Africa. In fact many Third World tourism destinations are in a similar predicament (Britton, 1979; Ionnides; 1998; Echtner and Prasad, 2003). Close collaboration between DMOs and tour operators is essential to bridge the image and policy-marketing gap and facilitate a more Positive Chain of Influence. Such collaboration could develop between DMOs and domestic tour operators through an effective regulatory and incentive regime. However, DMOs are at a serious disadvantage in their ability to influence tour operators in the source markets. Tour operators in source markets are very powerful and they deem DMOs to have a minor role in influencing the tour operator's decision to sell a new destination or a product (Ioannides, 1998). Tour operators in source markets enjoy an upper hand in international tourism marketing and often succeed in securing subsidies and concessions from DMOs, especially when the DMOs have to woo tour operators from source markets in their desperation to attract international tourists to earn foreign exchange.

7. CONCLUSION

Tourism promoters including DMOs and international tour operators play a pivotal role in destination marketing. Their marketing materials are designed to influence tourist decision-making and behaviour. This paper has analysed the portrayal of a developing country, South Africa, by its DMOs and tour operators in its main source market, Britain, applying the concept of a Chain of Influence. The Chain of Influence considers the compatibility between destination marketing and tourism policy objectives. It is suggested that the content of marketing material is influenced by the priorities of those who design these materials. A Positive Chain of Influence, in which the destination is portrayed in synergy with the tourism policy objectives, should lead to tourism development that offer social and economic benefits to the destination communities. A Negative Chain of Influence occurs when the portrayal of the destination departs drastically from the tourism development objectives enshrined in the tourism policy and would make it difficult to achieve specific tourism development objectives enshrined in the tourism policy.

Even though this research does not reveal a clear indication of the existence of either a Positive or a Negative Chain of Influence in South Africa's tourism marketing, it does illustrate the link between the business objectives of tour operators and the congruence it has with the destination images they try to portray. In the case of South Africa it is also clear that the objectives of the White Paper of 1996 are aligned to achieve sustainable tourism through an emphasis on regional development and support of locally owned enterprises (Dieke 2010). Therefore, had the tour operator brochures not deviated from

DMO brochures in areas such as amenities and attractions, a Positive Chain of Influence would have been achieved. Likewise, had DMO brochures put the same amount of stress on luxurious enclave tourism as done by tour operators (suggesting this type of tourism would be preferred by the tourist), a Negative Chain of Influence would have resulted. Based on the current research it can be proposed that the status of a Chain of Influence can only be determined if both sets of brochures depict an overwhelming similarity, the content of both being dominated either by the national tourism policy or the interests of the tour operators and tourists.

What this research does reveal is a divide in destination marketing by the two major marketing agents, especially in the image they have portrayed. In the longer term such a divide can potentially lead to a confused destination image and a failure by South African tourism to achieve its policy objectives. Tour operators, with their proximity to the market, may succeed in achieving their business objectives by painting an image that creates a fantasy felt to be attractive to their target markets. However an image divide is natural when different stakeholders try to project aspects of the destination that appeal to different segments of the market. As the inherent aspects of a destination are unalterable, at least in the short term, it is important to avoid such an image divide or cognitive dissonance as much as possible in order to minimise the consequences of a perceptual dichotomy. A divide in induced image certainly holds overt dangers for the tourism industry at the destination. Because the tour operator tends to be geographically and psychologically closer to the international tourist, the latter could more easily be influenced by the former. Therefore, if DMOs strive to encourage a certain type and level of tourism while tour

operators promote other forms, the destination will struggle to meet its national policy objectives, which is an inherent problem of tourism policy implementation as policies are developed by the public sector but the tourism product development and delivery is done by the private sector.

In order to achieve a Positive Chain of Influence DMOs will have to play a far greater role in educating the foreign travel trade, perhaps, through actions such as regular familiarisation trips. However, it is also very important for DMOs to advocate ownership of tourism among national stakeholders in line with the arguments of Morgan et al (2003). This is crucial in introducing measures that could help alter the organic image of the destination. For example, South Africa's organic image as a society with high levels of crime could be transformed if stakeholders made a conscious effort to improve this, be it through legislation, improved security measures or voluntary initiatives.

The content analysis of two thousand pictures from DMO and tour operator brochures revealed both synergies and divergences in the destination marketing of South Africa. The underlying challenge in destination marketing here is that of dealing with the organic images of a country, which might be less attractive than desired. The analysis suggests that the Chain of Influence is neither dominated by the tourists or foreign tour operators as suggested by Britton (1979), Silver (1993) and Echtner and Prasad (2003), nor is it dominated by national tourism policy objectives. Rather it is dominated by efforts to mask the organic image of the destination, leaving the Positive Chain of Influence little more than a Utopian dream. The only "myth" in South African tourism marketing advocated by both

DMO and tour operator is that of a safe destination, while its organic image suggests

otherwise. The challenge confronting South African tourism in their quest for

sustainability and competitiveness is how to bridge the image and policy-marketing gap and

facilitate a Positive Chain of Influence. Targeted policy initiatives and effective

instruments to educate and influence both domestic and international tour operators about

promoting a destination image that is in synergy with the national tourism policy objectives

will be a good beginning for not only South Africa but other Third World countries to

achieve a Positive Chain of Influence in tourism marketing.

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Table 1 Summary of the main objectives of the White Paper of 1996

South Africa Tourism White Paper of 1996

1. Tourism that would bring development to rural areas
2. Tourism as a force of peace, building cross-cultural relations
3. Tourism as a foreign exchange generator
4. Tourism that would create wide-spread employment
5. Developing a 'new tourism' (alternative tourism) that would be engaged in responsibly and that would benefit the local community
6. Encourage tourists to use local products and establishments
7. Tourism that is socially and environmentally responsible
8. Tourism that would promote innovative itineraries packed with local attractions and using local ammenities (tourist services, i.e. anti-mass tourism)
9. Developing and promoting the previously disadvantaged in the tourism sector, i.e. more focus on black and coloured citizens and women in employment and in marketing
10. To lengthen the tourism season

Table-2 Tour Brochures Analysed

British Tour Operators

1. "Southern Africa" produced by Flight Centre, dated: 2006 / 2007

2. "Africa" produced by On the Go, dated: 2006 / 2007

3. "Africa & Indian Ocean" produced by Cox & Kings, dated: 2007

4. "Indian Ocean Cruise" produced by African Safari Club, dated: 2007 / 2008

5. "Explore! Cycle" produced by Explore!, dated: 2007 / 2008

6. "Faraway Holidays" produced by Saga, dated: 2007 / 2008

7. "African Pride" produced by African Pride, dated: 2007

8. "Africa and the Indian Ocean" produced by Rainbow Tours, dated: 2007

9. "Trailfinders Worldwide" produced by Trailfinders, dated: 2007 / 2008

10. "Africa" produced by Cedarberg African Travel, dated: 2005 / 2006

11. "Experience Africa in Close-up" produced by Guerba, dated: 2007

12. "Worldwide" produced by Kuoni, dated: 2007

13. "Far-away places" produced by Travelsphere, dated: 2007

14. "Long haul Holidays" produced by Mercury Direct, dated: 2006 / 2007

15. "Africa" produced by Bales Worldwide Travel, dated: 2007 / 2008

16. "Africa" produced by Thomas Cook Signature, dated 2006 / 2007

South African Tourism

1. "Cape Town & Western Cape" produced by Tourismcapetown, dated: 2005

2. "Mpumalanga" produced by Mpumalanga Tourism Authority, dated: N/A

3. "Battlefields" produced by Zulu Kingdom, dated: N/A

4. "Discover Gauteng" produced by Gauteng Tourism Authority, dated: N/A

5. "Province of the Northwest" produced by Nortwest Parks & Tourism Board, dated: N/A

6. "Limpopo Tourist Factfiler" produced by Limpopo Tourism Parks Board, dated: 2004

7. "South Africa Travel Guide" produced by SAT, dated: 2007

8. "South Africa Factfiler" produced by SAT, dated: 2005

9. "South Africa" produced by SAT, dated: N/A

Table 3: Depiction of Tourism Amenities

Accommodation	Numbers of Pictures	Intl Accomm	Local Luxury	Local Standard	Alternative	
Tour Operator	526	13.7%	62.2%	22.8%	1.3%	
DMO	42	28.6%	33.3%	26.2%	11.9%	
Transport		**Intl Airline**	**Local Airline**	**Rail**	**Public**	**Road**
Tour Operator	62	22.6%	16.1%	41.9%	4.8%	14.5%
DMO	50	2%	12%	14%	36%	36%
Restaurants		**Upmarket**	**Intl Accomm**	**Local Standard**	**Alternative**	
Tour Operator	45	2.2%	71.1%	8.9%	17.8%	
DMO	46	21.7%	6.5%	34.8%	37%	

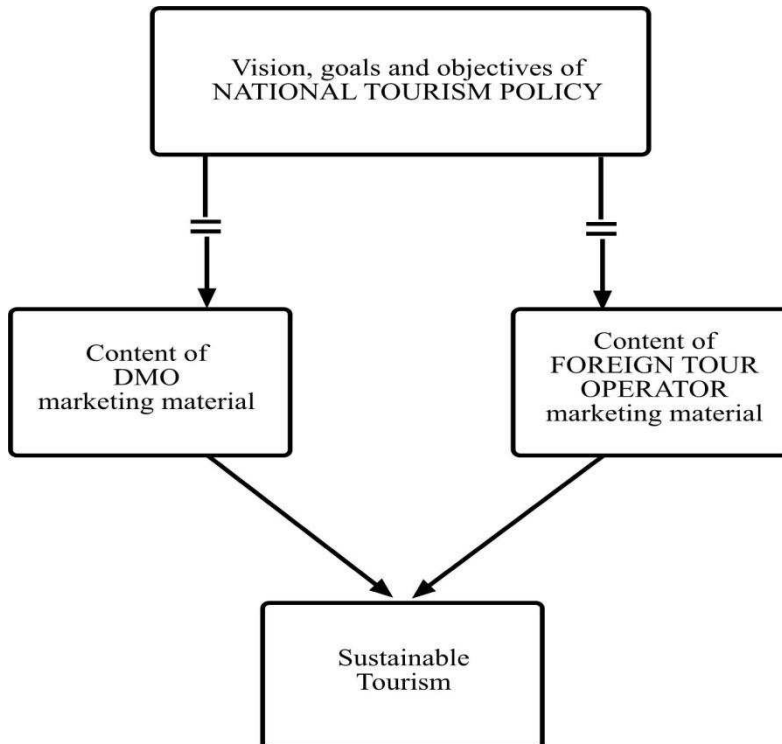**Figure 1: The Positive Chain of Influence**
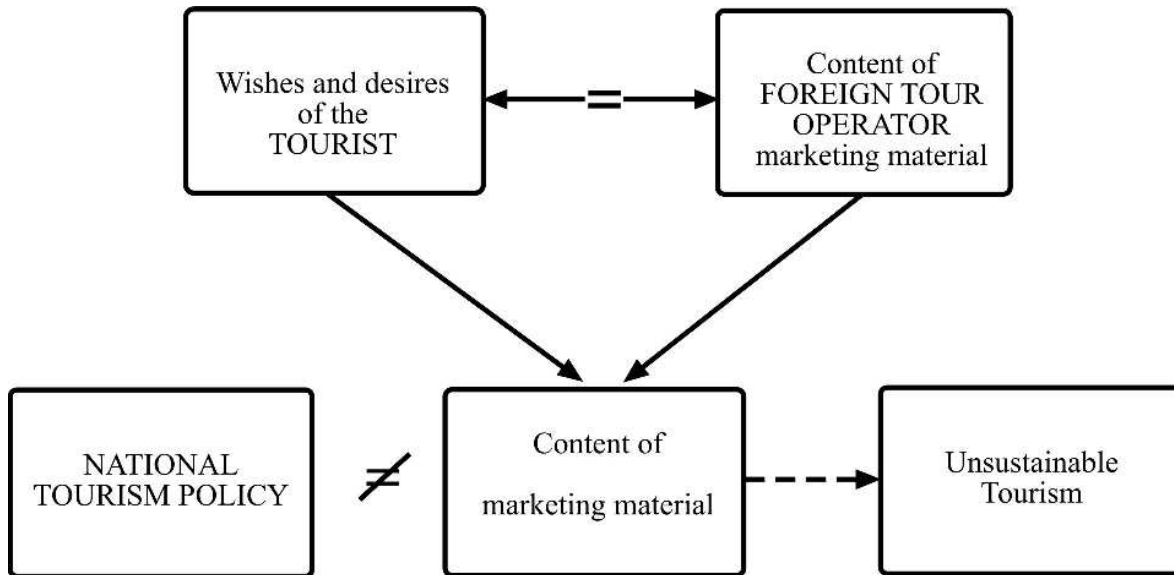

44

Figure 2: The Negative Chain of Influence

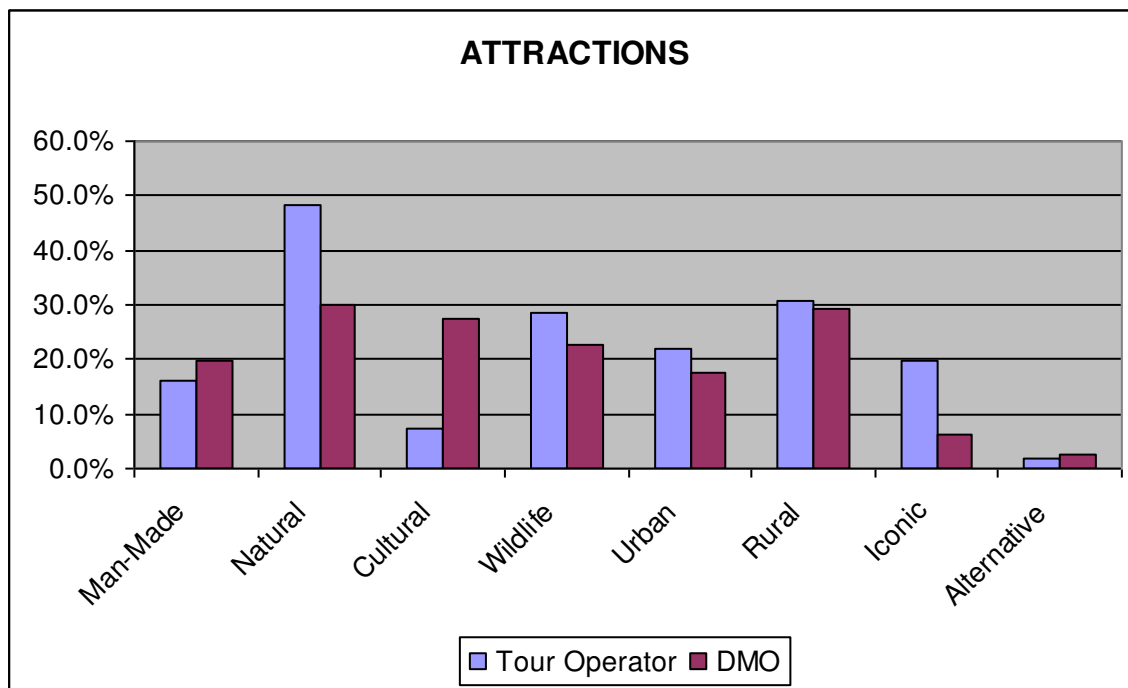**Figure. 3 Portrayals of Attractions in Tour Operator and DMO Brochures**

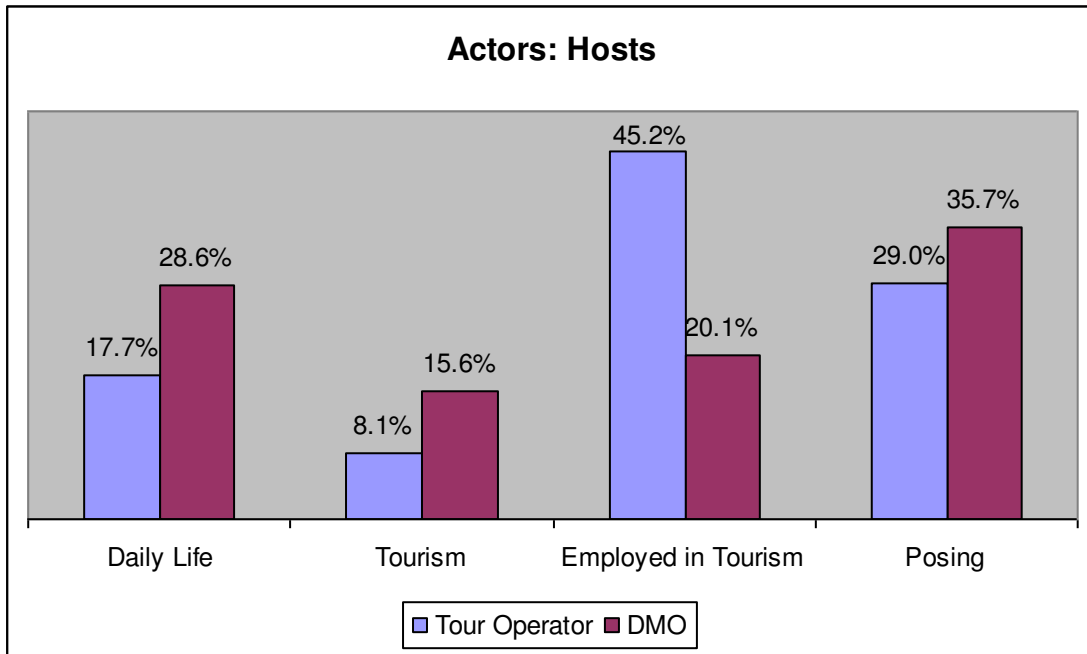**Figure.4: Brochures' Depiction of Hosts According to Their Actions**

Actors: Hosts

Daily Life — Tour Operator: 17.7%, DMO: 28.6%
Tourism — Tour Operator: 8.1%, DMO: 15.6%
Employed in Tourism — Tour Operator: 45.2%, DMO: 20.1%
Posing — Tour Operator: 29.0%, DMO: 35.7%

☐ Tour Operator ■ DMO

Figure.5: Brochures' Depiction of Hosts According to Their Cultural Backgrounds

Actors: Hosts

Black — Tour Operator: 53.2%, DMO: 60.4%
Asian — Tour Operator: 0.0%, DMO: 1.3%
Coloured — Tour Operator: 8.1%, DMO: 7.5%
White — Tour Operator: 25.8%, DMO: 13.0%
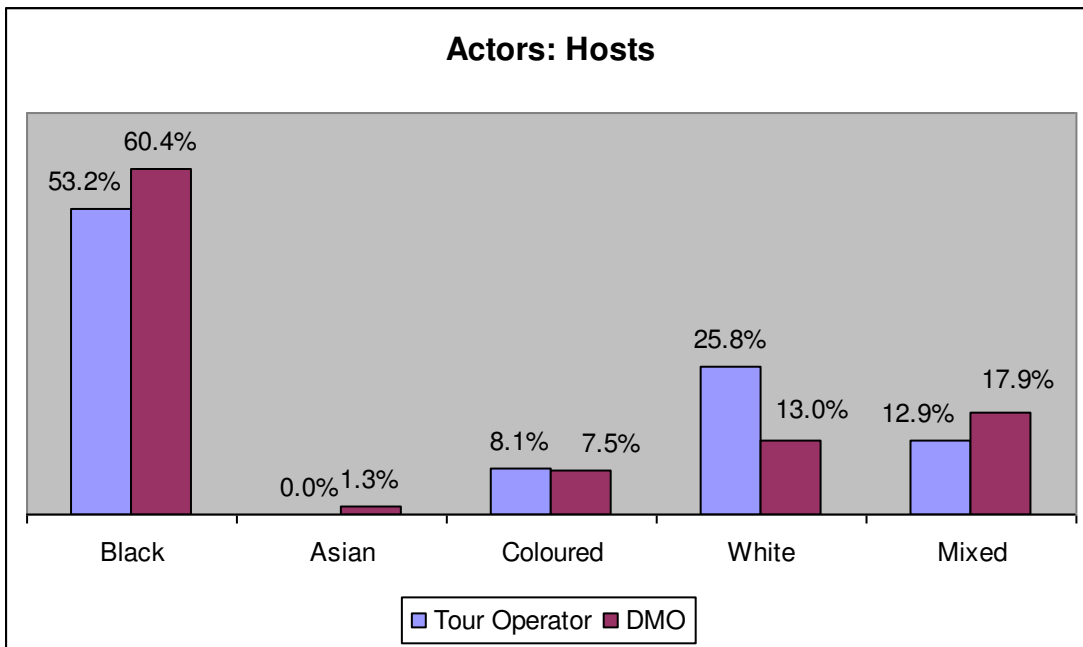Mixed — Tour Operator: 12.9%, DMO: 17.9%

☐ Tour Operator ■ DMO

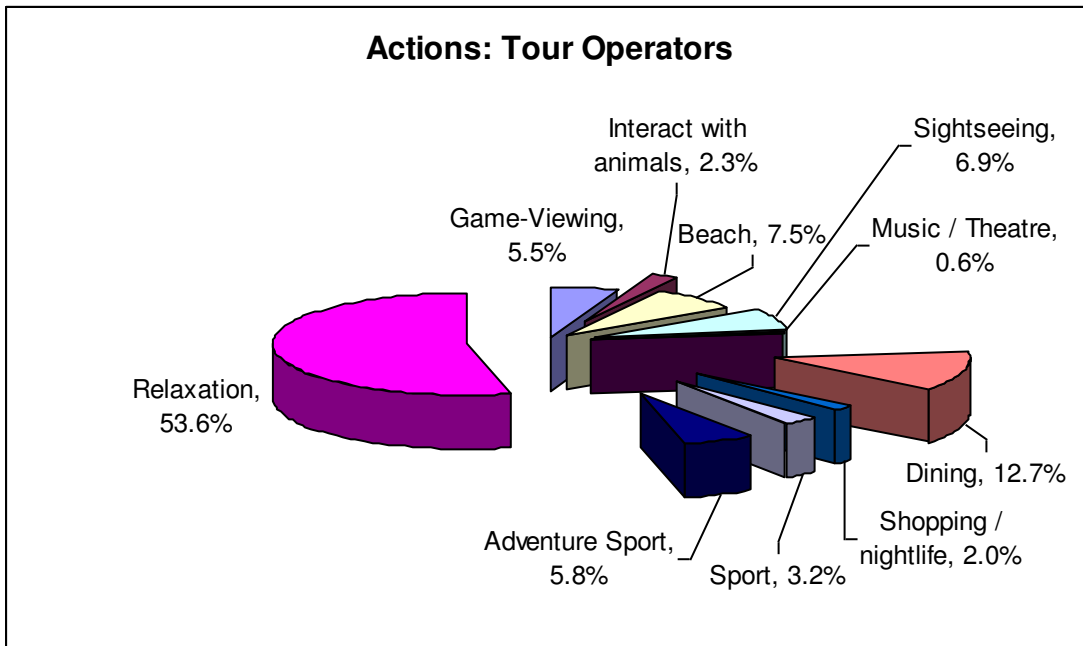**Figure 6:'Tour Operator Pictures Depicting Actions/Tourism Activities**

Figure 7: DMO Pictures Depicting Actions/Tourism Activities