2013 Adventure Travel
World Summit in Namibia

Report on the Delegate Survey
This report was commissioned by Millennium Challenge Account Namibia (MCA-N) for the Ministry of Environment and Tourism in Namibia.

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## Abbreviations and Acronyms

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<thead>
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<th>Abbreviation</th>
<th>Full Form</th>
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<tbody>
<tr>
<td>ATTA</td>
<td>Adventure Travel Trade Association</td>
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<td>ATWS</td>
<td>Adventure Travel World Summit</td>
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<td>CBA</td>
<td>Cost Benefit Analysis</td>
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<td>EIA</td>
<td>Economic Impact Analysis</td>
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<td>FENATA</td>
<td>Federation of Namibian Tourism Associations</td>
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<td>HAN</td>
<td>Hospitality Association of Namibia</td>
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<td>MCA-N</td>
<td>Millennium Challenge Account Namibia</td>
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<td>MET</td>
<td>Ministry of Environment and Tourism</td>
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<td>NADM</td>
<td>North American Destination Marketing Campaign</td>
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<td>NTB</td>
<td>Namibia Tourism Board</td>
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<td>ROI</td>
<td>Return on Investment</td>
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<td>SHEC</td>
<td>Swakopmund Hotel and Entertainment Centre</td>
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<td>TASA</td>
<td>Tour and Safari Association of Namibia</td>
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<td>TOR</td>
<td>Terms of Reference</td>
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<td>WWF</td>
<td>World Wildlife Fund</td>
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The Tourism Sector has been identified as a strategic sector in the National Development Plan 4 with promise for growth and job creation by the Government. The tourism industry is recognised and supported by the Government of the Republic of Namibia (GRN) for its increasing value and importance of sector linkages, its ability to generate foreign exchange earnings, employment, rural development, poverty reduction and empowerment of the local communities. The tourism industry presents great opportunities to promote economic, social development and environmental protection.

The Ministry of Environment and Tourism (MET) and the Namibian tourism industry embarked upon the exciting initiative of hosting the Adventure Travel World Summit in Namibia for 2013 bringing together all the key interested parties including MET, the Namibia Tourism Board, the Adventure Travel Trade Association (ATTA), the various public sector organisations in Namibia, the communal conservancy sector and most importantly the private sector tourism industry in Namibia as well as key companies within the Namibian economy.

The message that “Tourism is everyone’s business” has been cemented in Namibia through this Summit. Throughout the course of the preparations for this Summit, the mention of partnerships has been consistent. During the entire time there has been many highlights around this partnership, partnerships have been build with many of our partner in the travel media, partnerships across the supply chains of our industry. In Namibia we live these partnerships between government and private sector, with NGO and communities. The summit itself was exceptionally well managed and all participants truly played their part in making it an extraordinary success.

As the Government of Namibia we are looking at the economic outcome of the event. As part of that process, we undertook, with the assistance of the Millennium Challenge Account – Namibia (MCA-N), a Survey of Delegates to the ATWS. This report sets out the findings from the responses of these delegates not only with regard to economic items such as their expenditure in our country but also at their perceptions of Namibia and their views on different aspects related to tourism and conservation in our country.

We are grateful for the views the respondents have kindly given us, which will help us very much in the future.

Let me extend my sincere gratitude to all the stakeholders and the private sector for their tireless support towards this Ministry in making the ATWS an unforgettable event. May the spirit of partnership, cooperation, communication and working towards a common goal as exemplified by Team Destination Namibia continue.

Hon. Uahekua Herunga, MP
Minister of Environment and Tourism
The Adventure Travel World Summit (ATWS) was hosted by Namibia on 26 - 31 October 2013. It was the first to be held in Africa, the first to be held in a dual location (Windhoek and Swakopmund). There was a series of tours, days of adventure and other events.

Overall, the ATWS was very well organized and could be described as an event nothing short of amazing. It was a result of the coming together of the expertise of three parties:

- ATTA's management bringing their expertise of organizing such an event;
- The outstanding expertise of the private Namibian tourism industry showcasing Namibia; and
- The expertise of the public sector in Namibia in making their considerable contribution.

Overall it was a highly successful event.

DELEGATE SURVEY

The Delegate Survey took place in December 2013 using the online application, SurveyGizmo. Respondents were anonymous, unless they wished to give their name and contact. A total of 109 full responses were received—a 17% response rate. International respondents comprised: 31% international tour operators (mostly USA), 18% media, and ‘others’ which included tourist authorities (promoting their own destination) and service providers to the industry. Nearly 90% of the respondents were international visitors, mostly in the 30-49 age group, and broadly divided between male and female (55%M: 45%F).

CHANGES OF PERCEPTION ABOUT NAMIBIA – INTERNATIONAL VISITORS

International respondents indicated that there were large changes in their perceptions of the potential for Namibia as an adventure tourism destination as a result of the ATWS; partly this will have been influenced by the large proportion of internationals that were first-time visitors. Two thirds of respondents scored the change as 8, 9 or 10 out of a scale of 0 to 10 where 10 is ‘totally changed their perception’. As an example, the largest shift occurred in their perceptions of the portfolio of adventure activities in Namibia. Around 85% saw it as ‘much better’ or ‘better’ than their previous perception.

CHANGES IN PERCEPTION OF NAMIBIAN RESIDENTS

The shift in perceptions were huge for the Namibian residents who attended ATWS in terms of their perceptions of the potential for adventure tourism and in terms of Namibia’s capabilities to manage and contribute to such events as ATWS. However, respondents were small in number.

DELEGATES’ LENGTH OF STAY AND EXPENDITURE

As would be expected, the Namibian residents spent less time associated with the ATWS than the international visitors—6 nights as compared with 11 nights on average. The average spend in Namibia by delegates (internationals and residents) was N$12,241. With a simple grossing up, the total delegate personal spend was around N$ 8 million. This spend excludes costs of hosting and excludes international air fares. The survey confirms the pre-event estimate which was also N$ 8 million direct spend by delegates.

DELEGATES’ VIEWS ON HIGHLIGHTS, DISAPPOINTMENTS, AND IMPROVEMENTS

Disappointments were pretty well non-existent. Delegates struggled to express means for improvements. ‘Highlights’ were exceptionally favourable. “It was an experience of a life time” was a sentiment expressed by many of the respondents, along with congratulations to Namibia for its advanced community and conservation work.

Windhoek Lager Dinner in the Dunes. Photo: Courtesy - MartinDell
1. Background

Namibia hosted the Adventure Travel Trade Association (ATTA) 2013 Adventure Travel World Summit (ATWS) (26 - 31 October 2013). The ATWS drew 650+ delegates in the adventure travel industry resulting in international exposure and awareness of Namibia as a viable adventure tourism destination. The Ministry of Environment and Tourism (MET) considered that the Summit would stimulate economic growth, increase tourism revenue in the short and long term, and create more employment.

The ATWS was the first to be held in Africa and the first to be held in a dual location (Windhoek and the coastal town of Swakopmund). It had pre and post- event adventure tours around the country (for hosted journalists/ media/ buyers) as well as two days of adventure in between Windhoek and Swakopmund. In addition there was a series of other tours, days of adventure and other events.

As well as the main function of the ATWS at the Swakopmund Hotel and Entertainment Center (SHEC), there were two major functions, which were:

- Welcome Party in the Parliament Gardens in Windhoek (welcome from the President of the Republic of Namibia in person); and
- The Windhoek Lager Dinner in the Dunes outside of Swakopmund (800 plus attendees in a quite extraordinary location).

Overall, the ATWS was very well organized and could be described as an event nothing short of amazing.

TEAM DESTINATION NAMIBIA

It was a result of the coming together of the expertise of three parties:

- ATTA’s management bringing their exceptional expertise of organizing such an event;
- The outstanding expertise of the private Namibian tourism industry in providing the range of tours, adventure and hospitality activities showcasing Namibia;
- The expertise of the public sector in Namibia in making their considerable contribution to the development and execution of the whole event.
It was an amazing event, exceptionally well organized, and just four brief quotes capture key aspects:

‘It showed the resurgence of indigenous culture. There is one word for Namibia – awesome’.

(Chief Ian Campbell, Squamish First Nation, Canada)

‘A Summit never to be forgotten’.

(Hannah Messerli, World Bank, Washington DC)

‘The best pre-summit adventure I have ever been on’.

(Gregg Bleakney, Visual Storyteller, CEO Where Next, USA/Colombia)

‘Namibia has done Africa proud’.

(Sem Shikongo, Director of Tourism, Ministry of Environment and Tourism, Namibia)
Respondents came from a wide variety of countries but mostly from North America and Europe. Whilst there were slightly more male respondents than female, the balance in gender, arguably, was relatively even (55%M: 45%F). In terms of age, most respondents were in the 30 to 49 years age group. There were relatively few in the under 30s group (See Annex 1).

For the international visitors which were the predominant number of the respondents – nearly 90% - the breakdown of their businesses is shown in Figure 3.1. The largest grouping was ‘International Tour Operators’ followed by the ‘Media’. There were significant numbers of respondents who are with Tourism organizations (Authorities, Boards etc.) and then there were a large number of other categories which embraced consultants, travel agents, PR and marketing agencies, and various tourism industry services.

Figure 2.1: International Visitors: Business of the Respondents & Visits to Namibia

Nearly 80% of the international visitors (respondents) were first-time visitors to Namibia.
International Respondents indicated that there were large changes in their perceptions of the potential for Namibia as an adventure tourism destination as a result of the ATWS.

**Figure 3.1: International Visitors: Shift in perception of Namibia as an adventure destination as a result of ATWS**

<table>
<thead>
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<th>Perception Changes - International Visitors</th>
<th>Percentage of respondents so scoring</th>
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<tr>
<td>Scoring 0 (not at all) to 10 (totally)</td>
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The ATWS significantly impacted international visitors; partly this will have been influenced by the large proportion of delegates who were first-time visitors to Namibia. Two thirds of respondents scored the change as 8, 9 or 10 out of a scale of 0 to 10 where 10 is ‘totally’ (Figure 3.1).

Respondents (international visitors) were asked about the change in their perceptions to four aspects of trips to Namibia, namely

- Journey to Namibia
- Tour operations and transport around country
- Accommodation, eating and drinking
- Portfolio of adventure activities for tourists

As the following Figure 3.2 illustrates, perceptions changed substantially with respect to these four items.

**Figure 3.2: International Visitors: Perception Changes on the Four Items**

Perceptions changed the least for the *journey to Namibia* but then 40% + indicated that their perception was indeed ‘better’ or ‘much better’ than their previous perception. No change in perception was the predominant outcome but only 10% perceived it as worse.

The perception of *tour operations and transport around the country* saw a large shift in perception to ‘better’ and ‘much better’ – around 75%.

*Accommodation, eating and drinking* in Namibia saw a similar percentage as with tour operations. Three quarters of the respondents perceived it as ‘better’ and ‘much better’ than their previous perceptions.

The largest shift occurred in their perceptions of the *portfolio of adventure activities* in Namibia. Around 85% saw it as ‘much better’ or ‘better’. These are large shifts in perceptions. Certainly for the delegates to ATWS it will have been a perception changing experience.

As a final question, international respondents indicated a very high likelihood that they would recommend Namibia as an adventure holiday destination – nearly 90% scoring up at 8, 9, and 10 for making such a recommendation.
Namibian residents who responded were very small in number (n=11) and so caution must be exercised in using the results.

Namibian residents were asked about their change in perceptions with respect to:

- Potential for adventure tourism in Namibia in the future;
- Capability of Namibia to host and manage an event such as ATWS;
- Effectiveness of contribution to ATWS;
- Effectiveness of contribution of Namibian public sector; and
- Effectiveness of Conservancies.

The shifts in perceptions were huge for the Namibian residents who attended ATWS in terms of their perceptions of the potential for adventure tourism and in terms of Namibia’s capabilities to manage and contribute to such events (See Annex 1).

For the ‘potential for adventure tourism’, ‘contribution of the private sector’ and ‘effectiveness of the conservancies’, there were 100% shifts to ‘more positive+’ and ‘much more positive++’.

It was 90% ‘more positive+’ and ‘much more positive++’ for the ‘capability to manage such an event’, and 80% ‘more positive+’ and ‘much more positive++’ for the ‘contribution of the public sector’.

With regard to benefits, the rating levels of the Namibian residents attending (and responding to the survey) were less dramatic than the perception changes but nonetheless positive.

Namibian residents were asked about their rating of the benefit from the ATWS in terms of:

- Learning new industry skills;
- Making new contacts with the media;
- Developing new product ideas; and
- Developing new market contacts.

The Namibians rated the ‘learning of new industry skills’ at the highest level with 80% scoring 4 or 5. For ‘new media contacts’ around 55% scored in the 4 and 5 rating categories but more than 25% scored it at 1 (no benefit). For the ‘developing new product ideas’ and ‘developing new market contacts’ around 50% scored it at 4 or 5. The scale for the benefits was 1 (no benefit) to 5 (substantial benefit).
5. Average Length Of Stay And Expenditure

LENGTH OF STAY IN NAMIBIA

As would be expected, the Namibian residents spent less time associated with the ATWS in Namibia than the international visitors – 6 nights as compared with 11 nights on average.

DIRECT EXPENDITURE PER TRIP IN NAMIBIA

The expenditure per person during the ATWS (international visitor and Namibian resident) was N$ 12,241. The expenditure varies according to the country/region of residence (See Annex 2) but it has to be borne in mind that length of stay varies and also some delegates did not incur some of their costs themselves because of hosting. Hosting costs and expenditure on international air fares are not included in the direct expenditure in Namibia.

The breakdown of the expenditure is illustrated in Figure 5.1.

Figure 5.1:

Breakdown of Delegate Expenditure

As an overall estimate, the average of N$ 12,441 spent in Namibia per person has been grossed up by a figure of 658 delegates. This gives a figure of approximately N$ 8 million as total spend by delegates in Namibia to the ATWS. This excludes costs of hosting and also international air fares. The survey confirms the pre-event estimate which was also N$ 8 million direct spend by delegates.

A more complex grossing up is going to be used for the Cost Benefit Analysis.
Respondents were effusive in their praise for Namibia. Many highlighted the following:

Conservation and community based tourism in Namibia, and the associated business models

Wildlife in Namibia

The landscapes and nature – desert, dunes, Walvis Bay cruise

Specific sites such as Etosha, Sossusvlei, Spitzkoppe, Caprivi, Fish River Canyon, Henties Bay etc.

Specific experiences such as the desert Elephant, the Dunes Dinner, Bike township tour, Desert Express train journey, cycling etc.

Meeting the people, the tribes, the San

A few brief responses outline pertinent points:

“The amazing work that you have done in evolving wildlife, local communities and tourism. This is what tourism should be. Very inspiring!”

International Tour Operator. Brazil
“Conservation in Namibia and how Namibia is such a good case study for the world to imitate.”

International Tour Operator. USA

“Seeing wild oryx while horse riding.”

International Tour Operator. England

“Cycling in some of the desert landscapes, really unique scenery. And the Summit itself, including the first night parachuting and dinner in the desert, plus networking.”

Media. UK

“I have been to Namibia before and already thought it was a great destination for tourism. This feeling was only re-enforced this second time. Namibia has a lot to offer - culture, landscape, wildlife, eco-tourism, etc. It is a country with great diversity for a traveller.”

International Tour Operator. Canada

“Highlight was spotting lions on a boat trip on the Kwando River. I chose this because it was difficult to spot from far away, yet it was exciting to see them chasing buffalo.”

International Tour Operator. USA

“Beautiful landscapes, cutting edge community tourism initiatives, amazing tourism product overall.”

International Tour Operator. USA

“The opening dinner event at the summit. This was one of the best events that I’ve been to in my career in travel - spectacular venue, well organized, excellent entertainment!”

Representation Company. USA
The ATWS had an extraordinary portfolio of experiences for the delegates and consequently there is a very wide range of highlights both geographically and by type of experience.

The Word Cloud indicates the type of words used in the comments on ‘Highlights’.

“The oysters from Walvis Bay! and the opening night, amazing contrast (oysters in the desert) and amazing setting”

“The Desert Express train journey, Etosha, opening night dinner (!!!!!). Foreign Affairs Minister speech and the variety of landscapes.”

“Guides - their stories, especially when traveling through/near their villages... Cultures - impromptu singing and dancing, and sharing laughter, and seeing contemporary expressions of dance/culture. Night Safari in Etosha - we saw a lot of animals and exciting encounters.”

International Tour Operator. Italy

Consultant. Canada

Media. USA
7. Disappointments And Improvements

DISAPPOINTMENTS IN THE TRIP TO NAMIBIA

For some of the respondents the disappointments were not to do with anything in Namibia but more to do with their own lack of time to do more.

However a number of points were made including:

- Length of journey to Namibia; and
- Transportation and logistics around the country, and the distances.

There were various personal preferences expressed, which were not met and became a disappointment e.g. insufficient food choices for vegetarians. Basically disappointments were few, and the following response essentially sums up the situation:

“I wouldn’t say there were any disappointments, necessarily. There were small things -- waiters at restaurants often forgot to bring me the food I ordered, and there was never an apology when that happened. A taxi driver tried to charge me way too much money. A man grabbed me by the wrist and wouldn’t let go. The vendors selling goods were so aggressive that it made it uncomfortable to shop at times. These were very small things, though, and overall I enjoyed the trip. I think there are small disappointments almost anywhere you travel.”

SUGGESTIONS FOR IMPROVEMENTS FOR NAMIBIA

Respondents did not find a whole list of improvements. Suggestions revolved around

- Improvement in connectivity; and
- Improvement in some guest services.

The most frequent suggestion concerned the ‘keeping up the good work’ on conservation.

Various responses capture the situation:

“There are just small things that could be better but most everything is good.”

Tourism authority / organization. USA
“I absolutely loved the country. I can’t think of any improvements. My expectations were met and even exceeded.”

*Lawyer. United States*

“Namibian hospitality was outstanding. After my experience I think Namibia is for very rugged outdoor enthusiasts”

*Service to industry. USA*

“I would recommend Namibia wholeheartedly to some people, but there are others who aren’t as adventurous who I wouldn’t recommend it to -- but that’s just because the style of travel wouldn’t suit them”.

*Media. USA*
Respondents to the survey were given the opportunity to make a public quote, if they so wished, and further to append their name to the quote, again if they so wished. Several public quotes were given. Examples of such quotes are given below.

“Before coming to Namibia, I didn’t know too much about it. I had heard of the conservation efforts, and I had heard good things from friends who had been and that I would have a great experience. When I got there, I was blown away by your beautiful country. Windhoek and Swakopmund were wonderful cities and much cleaner and more beautiful than I had anticipated. The Namibian people were lovely, and I had such a special interaction with a Himba tribe that I will always remember and hold dear. I ventured on a Desert Elephant Experience in the northern deserts, and the wildlife I saw was incredible. I am so proud of your country for all that you are doing to make your country, and the planet, a better place, and I encourage you to keep moving in this direction and being a leader to others. The world will, and is already starting to take notice.”

Tour operator/ Ground operator, USA.

“Another great summit, this time in a magical place with amazing wildlife, incredible landscapes and warm, welcoming people.”

International Tour Operator, Canada.

“I think about Namibia every day. My experiences with the people we met are truly an experience I will not forget! So glad I went to Namibia & attended the meeting”

Travel Agent, USA.
“The adventure portions of the ATWS in Namibia were fantastic. The three companies I used for tours were excellent - Wilderness Safaris, African Bikers and Chameleon Holidays. Festus and Stretch our guides at WS and AB were particularly good. I loved all the animals at Etosha and Ongava. Damaraland was a pure delight, for the opportunity to connect with the San, see animals in the true wilderness, and stay in starry desert camps. Sossusvlei is, in a word, heavenly. The ATWS in Namibia was excellent. There were many opportunities to network with media, tour operators and other adventure travel influencers. The key note speeches were inspiring, funny and thought provoking. ATWS returns the best ROI, and the most fun, year after year.”

“Namibia exceeded all our expectations in terms of infrastructure, service levels and the warmth of its people.”

“Namibia put itself on the tourism map thanks to its commitment to and support of ATWS. The return on investment will be dramatic and long-lasting.”

“Amazing country with so much to see and do. Friendly people and beautiful land. A country ready for any adventure you can dream of!”

“Namibia exceeded all our expectations in terms of infrastructure, service levels and the warmth of its people.”

Travel agency owner, consulting firm owner. Canada.

International Tour Operator. USA.

Public Relations & Marketing agency, USA.
PUBLIC QUOTES FROM NAMIBIAN RESIDENTS COMING TO ATWS

“Very proud of Namibia and all the people who worked so hard to make the ATWS a success.”

Lodge Operator.

“It was an experience of a life time.”

Tour Operator.
CHARACTERISTICS OF THE RESPONDENTS

Age Group of Participants

- Under 30 years
- 30 - 49 years
- 50 plus years
- Missing

Resident in which country / region

- Namibia
- USA
- Canada
- Europe
- Southern African
- Rest of the World
- Missing

Gender of respondent

- Male
- Female

Pre-Summit Adventure: ATWS Activities

- Yes
- No

Two Day Adventure: ATWS Activities

- Yes
- No

Post-Summit Adventure: ATWS Activities

- Yes
- No
How has your involvement with ATWS affected your views on a number of different issues?

**Potential for adventure tourism in Namibia in the future**

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<thead>
<tr>
<th>Percentage</th>
<th>Negative</th>
<th>No Change</th>
<th>More Positive</th>
<th>Much More Positive</th>
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<tr>
<td>0</td>
<td>9</td>
<td>27</td>
<td>46</td>
<td>54</td>
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**Capability of Namibia to host and manage an event such as ATWS**

<table>
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<th>Percentage</th>
<th>Negative</th>
<th>No Change</th>
<th>More Positive</th>
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<tr>
<td>0</td>
<td>9</td>
<td>27</td>
<td>64</td>
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</table>
Effectiveness of contribution to ATWS by the Namibian private sector

Effectiveness of contribution of Namibian public sector

Effectiveness of conservancies in Namibia

2013 Adventure Travel World Summit in Namibia
RATING OF BENEFITS FROM ATWS – NAMIBIAN PARTICIPANTS

How would you rate the benefit of your involvement with ATWS on various management issues for yourself? Rating this on a scale of 1 (No benefit) to 5 (substantial benefit)

- **Learning new industry skills**
- **Making new contacts with the media**
- **Developing new product ideas**
- **Developing new market contacts**

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2013 Adventure Travel World Summit in Namibia
Annex 2: Technical Background To The Survey

OBJECTIVES OF THE SURVEY

The Objectives of the survey were to obtain information on:

- The expenditure of delegates to the ATWS whilst in Namibia on their trip associated with the ATWS;
- The change in perceptions of aspects of adventure tourism in Namibia as a result of attending the ATWS.

The information was wanted for input into the Cost Benefit Analysis being carried out into the economic impact of the ATWS initiative from the viewpoint of the Namibian Government and the Namibian economy.

APPROACH

The method used was to approach to all delegates (there was an email list) and request them to assist Namibia by answering questions on a website. ATTA encouraged delegates to do so and indeed sent out the emails. SurveyGizmo was the instrument used for putting the questionnaire on the website.

LIMITATIONS

A total of 109 full responses were received – some 17% response rate. As with internet surveys in general, the respondents are self-selected. It is not known whether respondents are significantly different from non-respondents. But there is no evidence to assume that there is a significant difference and thus the assumption is that the sample of 109 will provide ‘sample statistics’ that can be applied to the overall ‘universe’ of 650 + delegates. Despite the lack of randomness in the selection of the sample, the responses were used to give an indication of confidence intervals around the means.

METHOD

The Terms of Reference indicate that the Cost Benefit assignment should include an exit survey with ATTA delegates to ascertain direct expenditure by the delegates on the accommodation, food, transportation, entertainment, pre- and post-summit adventures and souvenirs and how much of that income is spent locally.

ATTA had indicated their willingness to assist. ATTA also has done its own survey and the two surveys were done in such a way as to avoid unnecessary overlap. The final questionnaire was put together by the Statistician using SurveyGizmo. The diagnostics test indicated that it would take about 14 minutes to complete, and there were no issues with complexity, fatigue or accessibility.

The pre-survey estimate of response was that 125 responses would be achieved. The final response was indeed some 138 responses but several of these were partial responses. Some of the partial responses give interesting observations and quotes but for the quantitative analyses the respondents were reduced to 109. The Survey was open from 29th November through to December 19th 2013. Responses were received from around the world though the main foci were North America and Europe.
As a check on plausibility, the spend per person per night was estimated for the international visitors. This figure came out at N$ 1175 and is judged as compatible with other information.
Table: Spend per person per trip (N$) – according to country / region of residence

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<td>5% Trimmed Mean</td>
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Spend per person per night (N$)

Mean = 1174.54  
Std. Dev. = 1298.212  
N = 91
Experiences In Focus
2013 Adventure Travel World Summit in Namibia