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Research Title:

A MODEL TO MEASURE SOUTH AFRICA'S TOURISM COMPETITIVENESS

DIVISION: TOURISM MANAGEMENT
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TABLE OF CONTENTS Page No

DEFINITIONS		3
EXECUTIVE SUMMARY		9
1.	BACKGROUND	16
2.	PURPOSE AND OBJECTIVES OF THE STUDY	18
3.	APPROACH TO THE STUDY	19
4.	METHODOLOGY	20
5.	STAKEHOLDERS RESULTS	23
6.	ASSESSING SOUTH AFRICA'S COMPETITIVENESS AS A TOURIST DESTINATION AGAINST SELECTED COMPETITORS IN IDENTIFIED SOURCE MARKETS	41
7.	RESULTS OF THE SOURCE MARKET SURVEY	43
8.	DISCUSSION OF PROBLEM AREAS WITH REFERENCE TO SECONDARY SOURCES	87
9.	DESTINATION COMPETITIVENESS EVALUATION MODEL	98
10.	LIMITATIONS	101
11.	BIBLIOGRAPHY	101
ANNEXURES		

DEFINITIONS

Accessibility	A destination's accessibility is a function of a variety of factors such as changes in the regulation of the airline industry; entry visas and permits; route connections, airport hubs, and landing slots; airport capacities and curfews; competition among carriers; and the character of other forms of transport mode accessibility.
Air Transport	Network carriers have extensive route coverage, regular schedules and are often part of international alliances and codeshares. Low cost carriers serve niche markets in geographic regions. Charter carriers generally serve pre-booked tours.
Analytic Hierarchy Process (AHP)	A rigorous technique that enables the integration of multiple judgments for studying how decisions are made.
Attractions	A designated permanent resource which is controlled and managed for the enjoyment, amusement, entertainment, and education of the visiting public (Middleton, 1989).
Awareness/Image	Destination image is the 'lens' through which tourists perceive all characteristics of a destination and therefore effectively all of the other competitiveness factors (Crouch, 2007).
Burning issues	The issues in the South African tourism industry which should receive immediate attention from the private and public sector.
Competitiveness	"…the degree to which a country can, under free and fair market conditions, produce goods and services which meet the tests of international markets, while simultaneously maintaining and expanding the real incomes of its people over the longer term …" (Dwyer & Kim, 2003:371).

Competitors	South Africa competes with a number of countries in terms of visitor numbers, and similar product offerings.
Content analysis	According to Berelson (1952), content analysis is the research method for the objective, systematic and quantitative description of the manifest content of communication.
Cost/Value	The cost of a destination to a foreign visitor is influenced by a broad range of local, domestic, and global forces. The monetary cost of a destination is governed by three factors: (1) the cost of transportation to and from the destination, (2) the currency exchange rate (in the case of international travel), and (3) the local cost of tourism goods and services (Crouch, 2007).
Culture and History	Destinations vary in terms of the abundance, uniqueness, and attractiveness of cultural and historical resources they have to offer the potential tourist, including quality-of-life and contemporary lifestyle experiences (Crouch, 2007).
Delphi technique	This technique is one of the most well established means of collecting the opinions of experts and of gaining consensus between experts on unknown factors underlying an issue.
Destination	"A destination can be regarded as a combination (under the umbrella of an overall destination brand) of all products, services and ultimately experiences provided in the particular area." (Heath, 2009).
Destination Competitiveness	A competitive tourism destination has the continuous ability to increase tourism expenditure and capacity to attract visitors while providing them with satisfying, memorable and unique experiences, in a profitable way, while enhancing the well-being of residents and preserving the natural capital of the destination for future generations within a changing macro

	environment.
Ecological diversity	The variety of ecological environments evident in South Africa.
Emerging source markets	Visitor arrivals from these countries are increasing due to a number of reasons, and as such warrants improved/increased marketing efforts.
Hospitality	The collective word used in the different sectors of the hotel and catering industry, a term also used to cover all products and services offered to the consumer away from home, including, travel, accommodation, food service, entertainment, recreation and gaming.
Events	"Attractions are those occurrences or creations (such as scenery, climate, hot water springs, exceptional fauna or flora, buildings or other architectural work, scenes of historic importance, works of art, places of enjoyment etc.) or happenings (such as festivals, meetings, sport competitions, etc,) in the natural or man made environments, that motivate people to travel."
Indicators of competitiveness	Objective and subjective measures of specific elements of a tourism destination's competitiveness. 'Hard' measures of competitiveness are those that are objectively or quantitatively measurable. 'Soft' measures are those that are subjectively or qualitatively measured (Dwyer & Kim, 2003).
Infrastructure	A destination's basic infrastructure includes those facilities and services that support all economic and social activity, such as roads, highways and transportation systems, sanitation systems, communication systems, government services and public facilities, a reliable and potable water supply, legal systems, utilities, financial systems, health systems, education, etc. (Crouch, 2007).
Leisure and business	Tourists who travel for the purposes of leisure or

tourists	business, making travel arrangements to meet their specific needs for whatever purpose. These include tourists in the categories of visiting friends and relatives as well as business travellers to conferences and meetings.
Location	A physically remote destination, that is, one that is far from the world's major tourist origin markets, is clearly at a distinct disadvantage in terms of accessibility, compared to another destination which neighbours major tourist markets and is therefore better able to convert latent visitor interest into actual visitation. The closer destination has the advantage of familiarity and lower travel cost (both monetarily and in terms of the opportunity cost of travel time) (Crouch, 2007).
Measures of uniqueness - core resources & attractors	Core resources and attractors underlie the basic desire to travel to a destination and provide the foundation for an exciting and memorable destination experience. These factors are the key motivators for visitation to a destination (Crouch, 2007).
Model (of competitiveness)	A model is a theory designed to explain an entire situation (destination competitiveness), with the idea that it would eventually be able to predict the situation (destination competitiveness).
Physiography and climate	The natural, physical attributes of the destination define its character. Together, these create the natural environment within which visitors experience the destination. It also defines much of the aesthetic and visual appeal of the destination and determines the extent to which the climate sustains and supports touristic activities. The breadth of the destination's natural attributes includes landscape and scenery, flora and fauna, and appealing or unique and intriguing natural phenomena (Crouch, 2007).
Positioning and branding	'Positioning' concerns where, in the mind of the

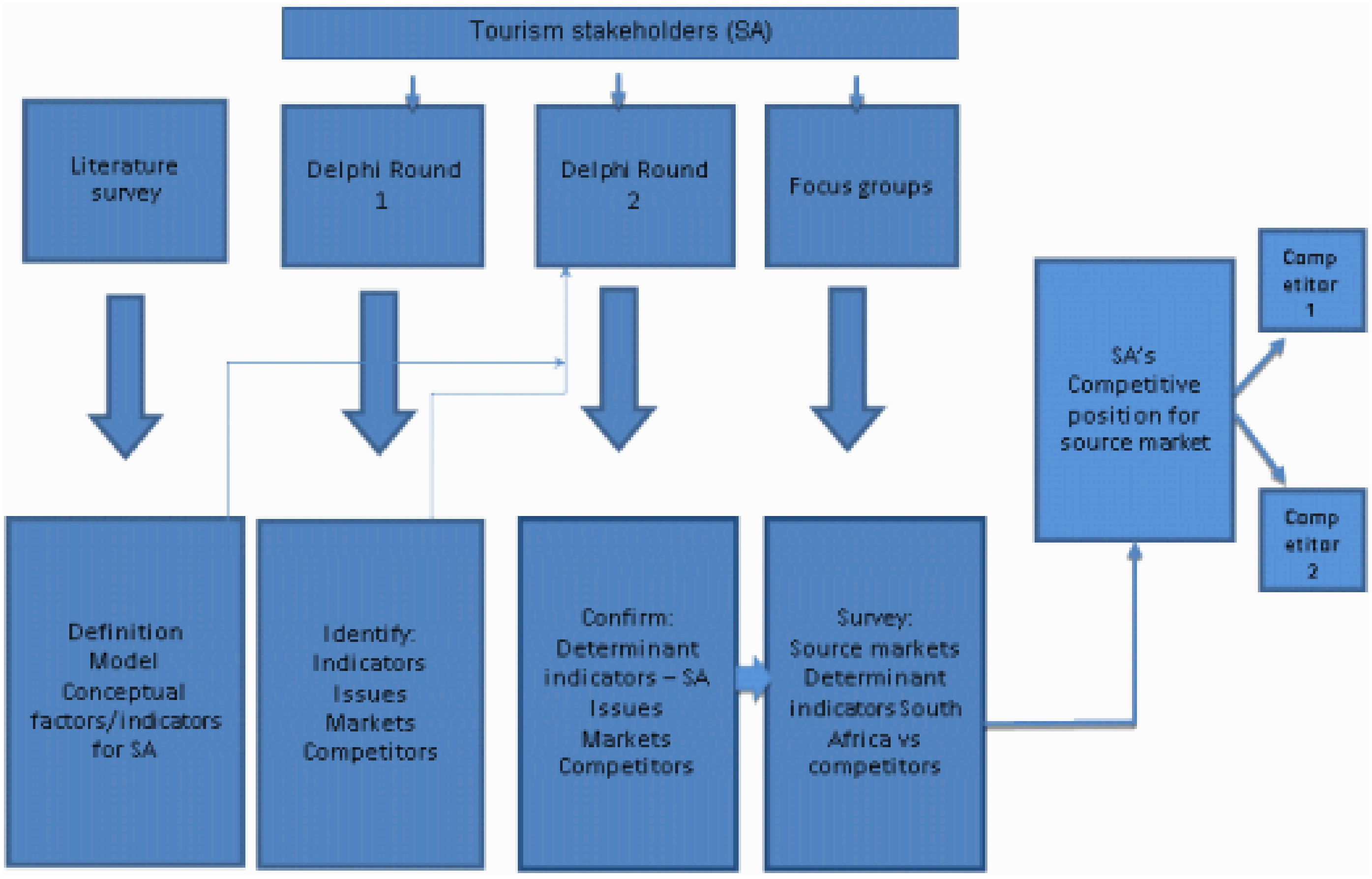
	tourist, the destination is located compared to its competitors. Branding is the tool used to create this positioning. Destinations with a clear competitive position and strong supportive branding usually perform better in gaining the attention of potential tourists (Crouch, 2007).
Public Perception	Public perception includes issues such as the branding and image of the country, socially responsible practices as well as environmental management. Socially responsible practices involves programmes and systems that a company can put in place to increase the safety and well-being of individuals. Environmental management ensures that the contact and influence of humans on the environment is managed. It aims to make sure that ecosystems are protected and maintained for future generations, by taking into account various ethical, economic and scientific variables.
Safety and security	Safety and security concerns can affect the choice of destination. If potential visitors are gravely concerned about crime, the quality of drinking water, the risk of natural disasters, the standards of medical services, terrorism, etc., a destination's competitive strengths may seem quite minor by comparison (Crouch, 2007).
Socio-economic status	The socioeconomic status of a country is influenced by a number of factors such as education, income, literacy, HIV/AIDS and others.
Stakeholders	"... those entities which have the highest probability of interacting with an organization or those which would have the greatest impact on, or greatest impact from, the organization's actions ...", and this will range from entities "... which can and are making their actual stakes known (sometimes called "voice") ..." to "... those which are or might be influenced by,

	or are or potentially are influencers of, some organization or another, whether or not this influence is perceived or known." (Starik, 1994:90)
Sustainability	Ritchie and Crouch (2003:30) states that sustainability within a destination implies to find a "… balance among four complimentary pillars (economic, social, cultural, political) in such a way that no fatal weaknesses are evident in the system of sustainability ..." The sustainable competitiveness of the destination will depend on the prosperity, standard of living and quality of life of its residents through the vision and goals the destination has set, either explicitly or implicitly'.
Tour operator	An organisation that puts together the services of airlines or other transportation carriers, ground service suppliers and other travel needs into a tour package which is sold through a sales channel, such as a retail travel agent, to the public.
Traditional source markets	Markets from which South Africa has historically received the most incoming tourists.
Transport	In the tourism industry, transport bridges the gap between origin and destination. Transport supplies the means by which tourists reach their destinations as well as the means of movement at their destinations. While transport may not be the primary reason for travel, it remains an essential part of the total tourist product.
Travel agent	A business selling the travel industry's individual parts or a combination of the parts to the consumer.
Vision	Conveys the industry's hopes for the future of tourism in the country.

EXECUTIVE SUMMARY

The aim of the study was to identify the most appropriate set of factors and indicators of destination competitiveness that are relevant to South Africa as a tourism destination with a view to developing and applying a model or instrument to measure and rate the country's competitiveness, relative to its potential. The research was done on the premise that to rank a destination's competitiveness against all other destinations is an exercise in futility. A destination competes within a source market and as such, must be viewed against competitors relevant to that source market using appropriate indicators as measures of comparison.

There were two stages to this project, the first was conducted in 2013 where the outcome was a definition which guided the study and a conceptual set of indicators that are appropriate to South Africa to measure its tourism destination competitiveness. The second stage, completed in March 2015 pertains to the methodology followed in validating the set of indicators to test South Africa's competitiveness as a tourist destination against specific competitors and within identified traditional and emerging source markets and the results obtained. This process and the broad outcomes are graphically represented as follows:



Once the conceptual factors and indicators had been determined, input from stakeholders in the tourism industry in South Africa were sought using a two-round Delphi Technique (the second round also included a simplified version of a technique termed AHP to establish which attributes are regarded as determinant indicators). Two focus groups were also held with senior executives of the National Department of Tourism and SA Tourism respectively. Main competitors and source markets were identified; burning issues in the industry which negatively impacts tourism to South Africa; the performance of both the private and public sectors in tourism; as well as the determinant indicators, were identified. In summary these results include:

Burning issues in the Tourism Industry
Improve safety and security Service education and training, skills development Ease of access (Open Skies/Clear Visa regulations) Promote unique products/variety of offerings Improve value for money offering - (overpriced luxury accommodation, airfares and air travel to Africa, airport tax too high) Upgrade/upkeep of general infrastructure (energy, water, roads, public transport)

Private Sector - Getting it Right	Private Sector - Getting it Wrong

Marketing Quality product offering/world-class facilities Service delivery focus Improvements: New technology/internet use/upgrades on buildings Good value for money Diverse product offering Staff training and upliftment	High costs/overpricing Fragmentation/no information sharing Lack of staff training and empowerment/low pay Lack of vision/training for operator on the vision No collaboration with public sector Apathetic/not registering with existing structures Not implementing sustainable business practices/ quality standards
Public Sector - Getting it Right	**Public Sector - Getting it Wrong**
Marketing Infrastructure development Partner with private sector Good policies/standards Websites Prioritising tourism as economic growth point	Marketing focus on current source countries only No action against crime Poor leadership/lack of guidelines ad policies Inadequate education and training Bad public transport Slow service delivery

The determinant factors and indicators on which consensus was reached to measure South Africa's competitiveness as a tourist destination were as follows:

Uniqueness of SA's Product Offering	Safety and Security	Mobility and Infrastructure	Ease of Access	Value for Money	Public Perceptions
Climate Wildlife Wine and food Sport participation (golf, surfing, mountain biking, etc.) Fauna and flora English is widely spoken Adventure tourism World heritage sites Beaches World class shopping/entertainment Friendly people Recent history Hiking Conference and meeting facilities Sport events (attending) Cultural diversity History	Tourist safety Ebola Health risks Bribery and corruption Crime	Exchange rates Service quality Cost of airfare Cost of airline taxes	VISA regulations Other entry requirements (e.g. vaccinations) Long haul flights Access to Africa via South Africa Border control	Exchange rates Service quality Cost of airfare Cost of airline taxes	Tourism branding and image Environmental management Socially responsible establishments and practices

Three traditional (UK, USA, Germany) and three emerging source markets (India, Brazil, China) were surveyed using an online questionnaire accompanied by an informed consent letter of introduction. The response from China was exceptionally low and could thus not be included in the results.

A number of factors influence the competitiveness of South Africa overall both positively and negatively. These influences were found to differ between source markets and will be discussed later.

The following tables highlight the key indicators making South Africa either more attractive or less attractive than the two main competitors in each source market.

USA

Compared to Kenya & Tanzania	
More attractive	Less attractive
- wine and food - tourist safety - number and quality of conference centres - public perceptions (tourism branding and image)	- wildlife - crime - cost of airfare - cost of airline taxes

Compared to Australia	
More attractive	Less attractive
- wildlife - wine and food - exchange rate	- safety and security (all variables) - public transport - access to electricity - other entry requirements - long haul flight aspects - public perceptions (environmental management and socially responsible practices)

UK

Compared to Australia	
More attractive	Less attractive
- wildlife - cultural diversity - exchange rate' - long haul flights	- beaches - safety and security (all variables) - access to public transport' - access to electricity - public perception (tourism branding and image)

Compared to Kenya & Tanzania

More attractive	Less attractive
- wine & food - number and quality of conference centres - banking sector - exchange rate - visa regulations	- recent history - tourist safety - Ebola - cost of airfare

GERMANY

Compared to Australia	
More attractive	Less attractive
- wildlife - value for money (all variables) - long haul flights	- beaches - safety and security (all variables) - access to public transport' - public perception (tourism branding and image)

Compared to Namibia	
More attractive	Less attractive
- service quality - exchange rate -	- health risks - Ebola - cost of airline taxes - airfare - long haul flights - public perception (socially responsible practices)

INDIA

Compared to Australia	
More attractive	Less attractive
- wildlife -	- safety and security (all variables) - public transport - entry requirements

Compared to Kenya & Tanzania	
More attractive	Less attractive
- English widely spoken - adventure tourism - Ebola - crime - number and quality of conference centres - service quality - public perceptions	- None

BRAZIL

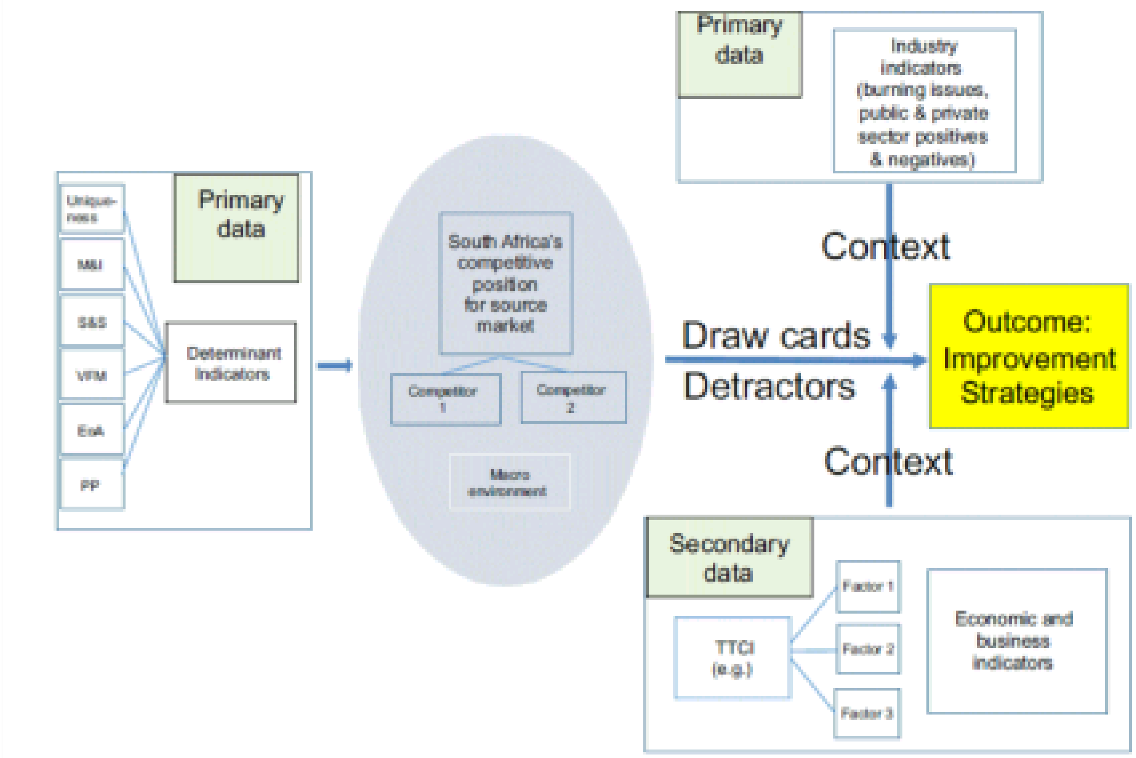
Compared to Kenya & Tanzania

More attractive	Less attractive
- wine and food - health risks - access to electricity - service quality - cost of airfare - long haul flights - public perceptions (all variables)	- wildlife - climate

Compared to Brazil (domestic tourism)	
More attractive	Less attractive
- wildlife - fauna and flora - adventure tourism - friendly people - history - climate	- crime - bribery/corruption - access to public transport - other entry requirements - public perceptions (socially responsible practices)

The formulation of a destination competitiveness evaluation model is explained and an example provided of how it can be populated with the results. The model is graphically represented as follows:

Destination Competitiveness Evaluation Model



An important insight from this research is that the perception of industry stakeholders of the burning issues and challenges facing the private and public sectors as well as

their successes are largely mirrored in the results from the source market surveys. This indicates that stakeholders are aware of what is required to be done in the tourism industry and how it can be achieved through improvement strategies and implementation.

1. BACKGROUND

1.1 Rationale for the study

Destination competitiveness is linked to the ability of a destination to deliver a better sustainable tourism experience to tourists than other destinations. Existing models on destination competitiveness include important aspects that impact on destination competitiveness but they are generally not country-specific enough to be meaningful and relevant to a particular country's tourism stakeholders and policymakers. Therefore these models appear to focus on generic, competitiveness factors and indicators that are not necessarily tourism specific or do not take into account the particular factors that are relevant and contribute to the destination competitiveness of a particular country. The lack of an existing model focusing on a particular country is the challenge that provides the rationale for this study, which is the development of indicators of tourism destination competitiveness that are specific and relevant for South Africa.

1.2 Problem statement

The most widely published research on destination competitiveness, from an academic perspective, are the conceptual models of Ritchie & Crouch (2003) and Dwyer & Kim (2003). Due to the sheer volume of the number of indicators presented in these models actual implementation of these (and numerous other models) in specific countries and regions have been limited, and where they have been applied, have been done to varying degrees and within specified boundaries (Enright & Newton, 2004; March, 2004; Crouch, 2011; Oh, Kim & Lee, 2013). Furthermore, as a subsequent study by Crouch (2007) has shown indicators are not all of equal importance or influence in determining competitiveness of destinations.

The World Economic Forum's (WEF) Travel and Tourism Competitiveness Index (TTCI) is the most widely used "industry" index and provides a measure of the performance of the travel and tourism industry in each of 140 economies in the world, based on approximately

75 indicators. When assessing the competitiveness of specific countries the TTCI appears to be a rather blunt instrument. It is debatable whether all the indicators used are relevant from a tourist (consumer) perspective or even in a country specific context (e.g. South Africa's attractiveness may be based largely on its natural heritage, while that of another country might be based largely on man-made attractions and events). In this respect March (2004) rightly states: "Does the lack of five star hotels in the Maldives and the abundance thereof in the Caribbean make the latter destination more competitive than the former? For some travelling segments, the lack of carrying capacity of the Maldives is very attractive and the commercialisation of the Caribbean little short of abhorrent." Other limitations to the TTCI relate to a destination's geographic location and proximity to generating markets. It is safe to assume that Switzerland's proximity to substantial source markets is a crucial factor in its destination attractiveness and position at the top of the 2013 TTCI rankings. The TTCI also applies the same measures to developed countries, where data is readily available, and developing countries where finding suitable data for each measure is problematic - most developing countries fall in the lower end of the TTCI. While the economic indicators are meaningful for comparison in so far as they are quantifiable measures of generic and tangible attributes and outcomes, there are no absolute competitive measures in tourism because tourists choose destinations for a wide and complex number of reasons, financial, personal, cultural, emotional or psychological (March, 2004). As such, results from the TTCI are not necessarily meaningful to tourism stakeholders and policymakers as it might not place sufficient emphasis on specific tourism drivers and vital linkages that need to be considered in tourism development and promotion efforts. The development of a model or measurement instrument for tourism destination competitiveness inclusive of a set of indicators will allow identification of the relative strengths and weaknesses of South Africa as a tourism destination, and can be used to inform initiatives to drive growth and improve overall destination competitiveness provides the motivation for this study.

2. PURPOSE AND OBJECTIVES OF THE STUDY

2.1 The overall purpose of the study

The aim of the study was to identify the most appropriate set of factors and indicators of destination competitiveness that are relevant to South Africa as a tourism destination with a view to developing and applying a model or instrument to measure and rate the country's competitiveness, relative to its potential. Based on the identified indicators, the model or instrument should ideally be able to measure performance against minimum levels required to obtain a competitive market position.

2.2 The objectives of the study

During the first phase, completed in 2013, three objectives were set, namely to:

1) Define tourism destination competitiveness
2) Review existing models and measurement instruments and identify key factors used to determine tourism destination competitiveness;
3) Identify the most appropriate and relevant set of indicators of destination competitiveness for South Africa as a tourism destination and determine the minimum performance levels required for each indicator.

The second phase of the study, completed in March 2015, had the objectives to:

4) Develop a model or instrument for measuring South Africa's tourism competitiveness;
5) Consult relevant stakeholders to provide inputs on the developed model; and
6) Apply the model to determine South Africa's competitiveness as a tourist destination

3. APPROACH TO THE STUDY

There are two broad approaches to measuring destination competitiveness:

1) Generic model - as discussed in section 1.2 this model embraces a comprehensive number of factors and indicators that constitute competitiveness (e.g. Ritchie & Crouch, 2003; TTCI)

2) Evaluating the competitiveness of country A relative to one or a number of countries using various methodologies.

The approach taken by the research team underscores the second approach. Studies following this approach which were found to be most helpful from a tourism perspective were those of Enright and Newton's (2004) study on Hong Kong and March's (2004) study on Australia. Most helpful from a methodological point of view were Crouch (2011) and Oh, Kim & Lee (2013).

The approach taken by the research team is based on the following convictions:

- South Africa's performance as a competitive tourism destination should be measured against relevant competitors, not generically against all 140 economies of the world, as is the case with the TTCI.
- Destinations compete for market segments (not for the entire travelling population) who evaluate destinations based on their ability to provide similar experiences, thus targeting source markets is crucial.
- Competitors can differ for different source markets
- Destination competitiveness is measured by the level of influence that an indicator has on competitiveness <u>AND</u> how a destination performs on that indicator when compared to a competitor.
- Tourism demand-factors and tourism supply-factors must be represented when measuring destination competitiveness because destination competitiveness is not

only determined by its attractiveness but also by its supply of tourism products and policies.

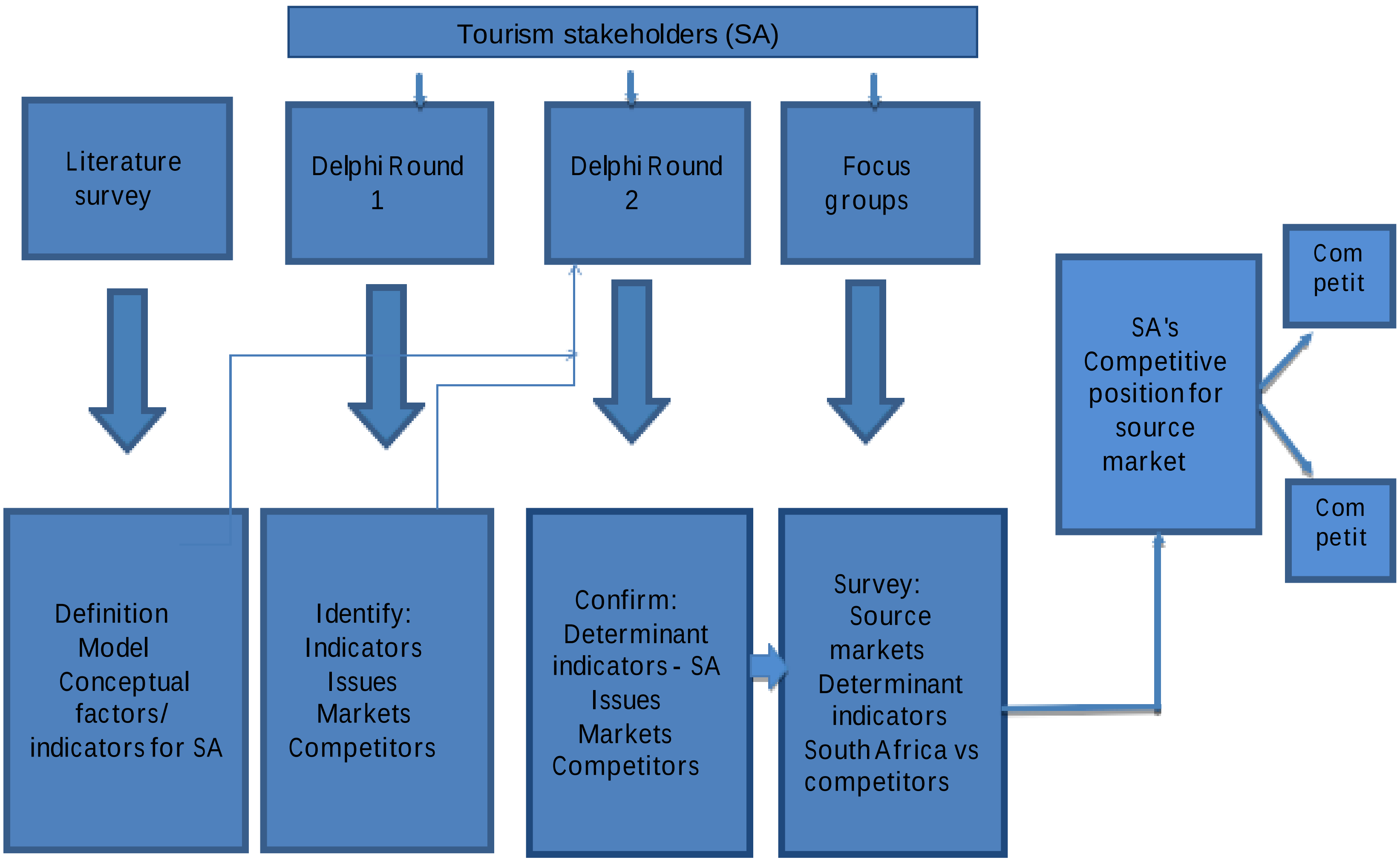
- Experienced travel industry professionals have substantial knowledge and understanding of their customers (demand) and supply challenges.

4. METHODOLOGY

4.4 Process and outcomes

The research process followed in this study is depicted in figure 1 and explained in the ensuing sections which include the results of each stage.

Figure 1: Process and Outcomes



4.2 Definition of tourism destination competitiveness

A literature review resulted in the adoption of a definition of destination competitiveness and the identification of conceptual factors and indicators deemed relevant to South Africa.

The "working" definition of tourism destination competitiveness which guided the study was largely based on that of Ritchie and Crouch (2003) with some adaptation made by the research team. This was found to be the most appropriate for the purposes of this study, based on the identified constructs:

A competitive tourism destination has the sustained ability to increase tourism expenditure and capacity to attract visitors while providing them with satisfying, memorable and unique experiences in a profitable way, while enhancing the well-being of residents and preserving the natural capital of the destination for future generations, within a changing macro environment.

This definition encapsulates five essential components of destination competitiveness:

1. Ability to deploy resources
2. Memorable experiences for tourists
3. Superior performance
4. Economic welfare of resident population
5. Sustainability

4.3 Validating the conceptual factors through stakeholder engagement

The research team conceptually identified indicators for South Africa in the first phase of the study in 2013. During this process it became evident that a distinction has to be made between what are regarded as "important" indicators and "determinant" indicators. According to Crouch (2007) "important" attributes or criteria are not always influential" while determinant attributes are those that are "judged to exert the greatest impact on destination competitiveness". Thus, while there is an extensive list of indicators, which are relevant, they are unlikely all to be of equal importance or influence in determining the competitiveness of specific destinations. Where destinations are similar on an indicator (e.g. climate) the indicator may be regarded as important for competitiveness but it will not be a determinant indicator or attribute.

Two main objectives were thus formulated for this phase:

i. To validate the appropriateness and importance of the factors/indicators to South Africa, both from a supply and a demand perspective.
ii. To investigate the determinant attributes of each factor/indicator for South Africa in terms of selected competitors and target markets.

A two-round Delphi Technique was applied among South African tourism industry experts. In the first round the appropriateness/importance of the factors/indicators to South Africa according to the tourism experts was sought as well as their opinions on the most important competitors and source markets for South Africa.

In the second round a simplified version of a technique termed AHP was used to establish which attributes are regarded as determinant indicators for South Africa's competitiveness (in other words which are believed to influence South Africa's competitiveness, either negatively or positively).

Two focus groups were also held with senior executives of the National Department of Tourism and SA Tourism respectively.

The following section provides the methodology and results of the Delphi Round 1, Delphi Round 2 and the combined results of the two focus groups.

5. STAKEHOLDER RESULTS

5.5 Delphi Round 1

During round 1 of the Delphi, an open-ended questionnaire was sent to 726 potential participants (refer to appendix A for the Delphi round 1 questionnaire). The response rate was 13%, which is comparable to the norm.

The questionnaire covered the following aspects:

- The vision
- Burning issues in South African tourism
- Leisure and business tourists' perspectives on the aspects that make South Africa more attractive than any other tourism destination, also covering aspects that make South Africa less attractive than other tourism destinations.
- Perspectives on what both public and private sectors are doing right, and also what they are doing wrong
- An assessment of the main reasons that traditional markets (including the UK, USA, Netherlands, Germany and France) have for visiting South Africa
- An assessment of emerging markets, and their reasons for visiting South Africa
- An assessment of South Africa's main competitors with reasons

The open-ended questionnaire's aim was to elicit spontaneous answers without prompting.

Content analysis was used wherein words with similar meanings are coded under a descriptive term. These codes are then added up in order to give an indication of the relative importance of the specific topic, how many times it was mentioned etc.

When participants were requested to rate specific aspects in order of importance, a weighted score was given to represent importance. Frequencies were multiplied by 5 if it is most important and by 1 if it was least important.

Demographics

A total of 94 participants were included in the data analysis, although only 62 of these represented complete data sets, the remaining 32 were at least 75% complete. Data sets where participants completed less than 75% of the questionnaire were excluded from the analysis.

The industries represented by these participants were:

Table 1: Industry sectors of Round 1 Delphi participants

Industry	
Hospitality	15%
Transport (Air)	3%
Transport (Other)	3%
Events/Conferences	18%
Tour Operators	7%
Travel Agents/Retail	9%
Attractions	6%
Education	11%
Public sector	9%
Tourism Association	7%
Other	14%
Total	

The participants represented organisations that have been in business in excess of 10 years (78%), suggesting that the expert responses were from established and experienced organisations in the tourism industry.

Vision

Table 2 Most important vision

Excellent service
Unique experience/innovative products/market as the world in one country
Maintain current vision (To be a top 20 tourism destination in the world)
Focus more on safety
Top 20 ICCA rankings

Burning issues

Table 3 Burning issues identified

1. Improve safety and security
2. Service education and training, skills development

3. Ease of access (Open Skies/clear Visa regulations)
4. Promote unique products/variety of offerings
5. Improve value for money offering - (overpriced luxury accommodation, airfares and air travel to Africa, airport tax too high)
6. Upgrade/upkeep of general infrastructure (energy, water, roads, public transport)

South Africa's good attributes

Attributes that make South Africa better than any other tourism destination were identified both from a leisure and business tourist perspective. For all tourists a favourable exchange rate was important, as well as a diversity in the product offering. In addition, South Africa's natural beauty, natural wonders and wildlife were highlighted as most important to leisure tourists. The business tourist perspective place more attention on a variety of venues and conference centres, quality accommodation and good transport infrastructure.

South Africa's worst attributes

From both leisure and business tourist perspectives, crime and uncertainty about Visa regulations are South Africa's biggest problems. The cost of airport tax and long haul flights also discourage tourism to South Africa. Bad service and lack of public transport was highlighted as important issues specifically for leisure tourists. For business tourists, corruption, political instability (including labour unrest) and red tape (bureaucracy) in conducting business are more important sources of dissatisfaction.

Public and private sectors' successes and failures

Participants were requested to indicate where the public sector is doing very well, and where they are failing.

Public sector is doing well

The public sector was shown to be doing very well in terms of marketing South Africa as a tourism destination, providing better information on websites and developing infrastructure (specifically public transport). Public private partnerships and setting and implementation of standards in the tourism industry were also mentioned.

Public sectors is failing

In the public sector, a lack of education and training in the tourism industry, inability to deal with crime effectively and lack of upgrades in infrastructure was identified. Poor leadership with a lack of guidelines and policies and slow service delivery to institutions in the private sector was highlighted as problematic.

Private sector doing well

The private sector was said to be doing well in marketing and offering a good quality product and service. Continuous improvements on privately owned infrastructure (including roads, accommodation and internet access) as well as private buildings (hotels and conference centres) were mentioned. The diversity of the products on offer was also regarded in a positive light.

Private sector is failing

The private sector's worst attributes were identified. These included high costs and overpricing of products while low pay for staff and too few training opportunities were offered to staff. A fragmented industry with limited information sharing, limited interaction with the public sector and lack of vision (exemplified in undercutting of costs) where mentioned.

Traditional markets' motivation for visiting South Africa

Reasons highlighted why traditional markets visit South Africa are indicated in table 4.

Table 4: Why traditional markets visit South Africa

		UK	NL	Germany	France	USA
1	Cultural ties and history	22	32	14	15	6
2	Visiting friends and relatives	22	11	3	2	2
3	Weather	20	14	21	16	9
4	Exchange rate is favourable	19	12	20	18	18
5	Wildlife	17	19	31	24	24
6	Scenery and nature	9	20	16	17	14
7	Business	6	2	4	3	3

Other aspects highlighted include the diversity of food and wine specifically for the French, and hunting specifically for the USA market.

Emerging market identification and reasons

China, India, Brazil and sub-Saharan Africa were indicated as the largest emerging markets, with the USA and UK also being mentioned, although less prevalent. Main reasons why these markets are considered emerging is due to BRICS trade interaction, growing economies in these countries and large populations.

Most important competitors and reasons

The most important competitors identified included Australia (due to a similar product offering), Tanzania and Kenya (due to similar wildlife options), Thailand, Malaysia and Indonesia (for shopping, pleasant weather and a good exchange rate), the Indian Ocean Islands (such as the Seychelles, Mauritius and Zanzibar) and Brazil (due to a similar product offering and being closer to the USA market).

Table 6: Time organisation has been in operation

	%
Less than a year	3
Between 1 and 5 years	16
Between 5 and 10 years	13
More than 10 years	69
Total	

Vision

The experts agreed that training in the tourism industry should be the first priority and the main vision of the tourism industry. This was followed by improvement in safety and security, improving the uniqueness of the experience for the visitor to South Africa, maintaining the current vision (to improve rankings) and finally, improving the value for money offering of South Africa as a tourist destination.

Burning issues

Burning issues were confirmed as:

1. Safety and security
2. Clearing up the Visa problems
3. Education in the industry
4. Upkeep of infrastructure including tourist attractions and infrastructure
5. Ensuring accessibility to the country
6. Marketing

Importance of factors

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Participants were requested to indicate the relative importance of specific factors and their underlying items by requesting that the factors and items be compared to one another to indicate which is more important to South Africa's tourism competitiveness.

The relative importance of the eight identified factors was ranked as follows:

1. Safety and security
2. Mobility and infrastructure
3. Value for money offering
4. Ease of access to and in South Africa
5. Diversity of product offering
6. Heritage and culture
7. Socio-economic influences
8. Ecological diversity

In the consideration of what should be included in the final questionnaire to stakeholders in the source markets, it was decided that items that were shown to be less important would not be included and the last 4 factors mentioned i.e. "Diversity of

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Table 9 Response rate from each country

Source Country	Number of invitations	Number of responses	Response rate
Brazil	40	7	17.5%
China	48	3	6%
Germany	285	19	6.66%
India	7420	420	5.6%
UK	138	23	16.6%
USA	381	40	10.5%

Table 10 Summary of various characteristics of the respondents and their organisations

Table 11 Respondents long haul activities

These respondents indicated that their main source of information concerning South Africa, is provided South African Tourism(75.5%) followed by trade partners (60.6%) and

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Table 13 Brazil Tour Operators long haul activities

Respondent profile	Amount
Percentage of packages offered to long haul destinations (flights of 8 hours or more.)	86%
The total number of tourist sent on long haul travel annually(by the respondents) approximately	246 900 tourists
Total number of tourists sent to South Africa	3%
	7295 tourists

These respondents indicated that their main source of information concerning South Africa, is from workshops, conferences and trade shows followed by SA tourism. The respondents receive information from their South African representative, trade partners, search engines and popular media.

Figure 4 Uniqueness of the product offering

All the variables measuring "uniqueness of the product offering" have a positive influence on competitiveness. Six of the variables measuring this factor have a mean score of three and above, indicating that these variables have an extremely positive influence on SA's competitiveness. The highest mean scores are achieved by wildlife (M=5.0), followed by wine & food (M=3.9) and fauna & flora (M=3.7).

When compared to Kenya & Tanzania, South Africa only features as more attractive in terms of wine and food (m=4.33). Given that wildlife is our most positive influencer, it should be noted that we are seen as less attractive (m=-1.67) than Kenya & Tanzania in terms of wildlife. Other factors where we are much more attractive than Kenya & Tanzania include sport participation (m=3.67), shopping/entertainment (m=3.33) and conference and meeting facilities (m=3.00). We are slightly less attractive in terms of climate (m=-0.33).

When compared to Brazil[1)] as competitor, South Africa harnesses the power two of the most influential features, as we are regarded as much more attractive in terms of wildlife (m=5.0) and more attractive in terms of fauna and flora (m=3.5). South Africa is also regarded as more attractive in terms of adventure tourism, friendly people and history (all at m=3.5) as well as climate (m=3.0). There are no aspects in which South Africa is regarded as less attractive.

Figure 5 Safety and security

Safety and security is again seen as having a negative influence on competitiveness, with Ebola (M=-3.4) and crime (M=-1.4) the most negative influence of the five variables.

When compared to Kenya & Tanzania, South Africa is regarded as similar in terms of tourist safety, Ebola and crime, but more attractive in terms of health risks (m=2.67) and bribery/corruption (m=2.33).

When compared to Brazil, South Africa is regarded as similar in terms of tourist safety, Ebola and health risks, but far less attractive in terms of the negative influencer crime (m=-3.0) as well as bribery/corruption (m=-2.0).

Figure 6 Mobility and Infrastructure

Three of the four variables measuring this factor have a fairly neutral influence on competitiveness, with only one variable, access to public transport (M=-0.7), having a negative influence.

When compared to Kenya & Tanzania, South Africa is regarded as more attractive in terms of all the variables including the negative influencer public transport. Access to electricity is seen as the most attractive aspect (m=3.0).

When compared to Brazil however, South Africa is regarded as less attractive than Brazil, with access to public transport being the least attractive aspect (m=-2.5).

Figure 7 Value for Money

The variables "exchange rates" (M=3.2) and "service quality" (M=3.1) have an extremely positive influence on SA's competitiveness, while cost of airfare (M=-1.8) and cost of airline taxes (M=-0.7) have a negative influence.

When compared to Kenya & Tanzania, South Africa is regarded as much more attractive than Kenya & Tanzania in terms of service quality (m=4.33) as a positive influencer, as well as cost of airfare (m=3), and more attractive in terms of exchange rates (m=2.33) and cost of airline taxes (m=2). Importantly, South Africa is regarded as more attractive in terms of both the negative influencers (cost of airfare and cost of airline taxes).

When compared to Brazil, South Africa is seen as similar to Brazil, only being more attractive in terms of the positive influencer exchange rates (m=2.0).

Figure 8 Ease of access

Respondents have a neutral opinion regarding SA's ease of access. Brazil is the only country that indicated "other entry requirements" (M=-0.7) as having a negative influence on competitiveness.

When compared to Kenya & Tanzania, South Africa is regarded as much more attractive in terms of long haul flight aspects (m=3.67) and more attractive in terms of border control (m=2.67) and other entry requirements (m=2.33).

When compared to Brazil, South Africa is regarded as similar and slightly less attractive in terms of the negative influencer other entry requirements (m=-0.5).

Figure 9 Public perception

Tourism branding and image (M=2.4), environmental management (M=2.4) and socially responsible establishments and practices (M=2.1) are all regarded as having a positive influence on SA's competitiveness.
When compared to Kenya & Tanzania, South Africa benefits from all three of the positive influencers, being regarded as more attractive than Kenya & Tanzania in terms of all three.
When compared to Brazil, South Africa is regarded as similar and only slightly less attractive in terms of socially responsible practices (m=-0.5).

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REPUBLIC OF SOUTH AFRICA

Table 15 US tour operator's long haul activities

These respondents indicated that their main source of information concerning South Africa, is provided by a representative in South Africa, South African Tourism or trade partners such as tour operators in South Africa. Workshops, conferences and trade shows are also an important source of information for these respondents. Very few make use of social media for gathering information on South Africa

When considering the uniqueness and diversity of the product offering and its influence on South Africa's competitiveness as a tourism destination, it becomes clear that all the variables measured have a positive influence on the country's competitiveness. According to the USA market South Africa's wildlife (M=4.6) has the most positive influence on its competitiveness, followed by its wine & food (M=3.9), fauna and flora (M=3.3) and adventure tourism (M=3.3).

When compared to Kenya & Tanzania, South Africa only features as much more attractive in terms of wine and food (m=3.6). Given that wildlife is our most positive influencer, it should be noted that we are seen as less attractive (m=-0.4) than Kenya & Tanzania in terms of wildlife. Other aspects where we are seen as much more attractive include sport events (m=3.2), world class shopping/entertainment (m=3.1) and conference and meeting facilities (m=3.0). We are more attractive, slightly more attractive or similar in all other aspects.

When compared to Australia as competitor South Africa harnesses the power two of the most influential features, as we are regarded as much more attractive in terms of wildlife (m=3.5) and more attractive in terms of wine and food (m=3.0). However, we feature as less attractive than Australia on a number of variables including South Africa's beaches (m=-1.0), recent history and sport events (m-0.8), conference and meeting facilities (m=-0.7), world

Regarding the influence of safety and security on competitiveness, the US market views tourist safety (M=1.03) and Ebola (M=1.5) as having a positive influence on South Africa's competitiveness, while crime (M=-1.3), bribery and corruption (M=-0.6) and health risks (M=-0.2) are seen as having the most negative influence on competitiveness. When compared to Australia, South Africa is regarded as much less attractive in all aspects of safety and security including the positive influencing factors of Ebola (m=-4.0) and tourist safety (m=-3.8).
When compared to Kenya & Tanzania, South Africa is regarded as more attractive in terms of tourist safety (m=2.36) and slightly more attractive in terms of all the other variables, accept for crime where South Africa is regarded as slightly less attractive (m=-0.64).

Figure 13 Mobility and infrastructure

Although all the variables measuring the construct of mobility and infrastructure are seen as having a positive influence on SA's competitiveness, respondents were more neutral in their opinions. The variable "access to public transport" has the lowest positive influence (M=0.5), while "access to electricity" has the highest positive influence (M=1.6). This is quite surprising, given the current reality of load shedding within the country. But with this result, one might assume that most tourist facilities have adapted to the current situation with generators etc. which might mean that it will not influence their tourists.

When compared to Kenya & Tanzania, South Africa is regarded as more attractive in terms of all the variables of mobility and infrastructure, with 'number and quality of conference centres' being the most attractive (m=3.0).

When compared to Australia, South Africa is regarded as less attractive in terms of all the variables, with access to public transport and electricity being the least attractive (both at m= -1.75).

Figure 14 Value for money

From the graph it is clear that the USA market regards service quality (M=3.5) as having an extremely positive influence on South Africa's competitiveness. They are also positive about the influence of the exchange rate (M=2.9) on the country's competitiveness. They feel that the prices of airline tickets (M=-0.0) have no influence on tourism competitiveness, while the cost of airline taxes has a negative influence (M= -1.1).
When compared to Australia, South Africa is seen as more attractive than Australia in terms of all the 'value for money' variables, with the positive influencer 'exchange rate' also being the most attractive feature (m=3.25).
When compared to Kenya & Tanzania, South Africa is regarded as slightly more attractive in terms of the key positive influencers service quality (m=1.81) and exchange rate (m=0.81). Given the negative influence of air transport costs, it is important to note that South Africa is regarded as less attractive than Kenya & Tanzania in terms of cost of airfare (m=-0.31) and airline taxes (m=-1.0).

Figure 15 Ease of access

The figure shows that all the variables measuring "ease of access" have a positive influence on SA's competitiveness. VISA regulations (M=2.2) are viewed as having a fairly positive influence, followed by access to Africa via South Africa (M=1.9). The fact that South Africa is a long-haul destination for the USA has almost no influence on its competitiveness (M=0.1).

When compared to Australia, South Africa is seen as slightly more attractive in terms of visa regulations (m=1.75), but less attractive in terms of other entry requirements and long haul flight aspects (both at m=-0.25).

When compared to Kenya & Tanzania, South Africa is regarded as slightly more attractive in terms of visa regulations (m=1.5) as a positive influencer, as well as entry requirements (m=1.06). South Africa is seen as similar in terms of long haul flights aspects and border control.

Figure 16 Public perception

The factor "public perception" has a positive influence on South Africa's competitiveness, with "tourism branding and image" having the most positive influence (M=2.8) of the three variables measuring this factor.
When compared to Kenya & Tanzania, South Africa is seen as more attractive than Kenya & Tanzania in all three aspects of public perception, with tourism branding and image (m=2.5) and environmental management (m=2.13) being most attractive.
When compared to Australia, South Africa does not benefit as much from the positive influencers with the country being regarded as fairly similar to Australia in terms of tourism branding and image (m=0.5), and less attractive in terms of environmental management (m= -1.5) and socially responsible practices (m=-1).

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Tourism
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Table 17 German tour operator's long haul activities

These respondents indicated that their main source of information concerning South Africa, is provided by a trade partner, South African Tourism or a representative in South Africa. Workshops, exhibitions, conferences and search engines are equally important as an important source of information for these respondents. Very few make use of social media

Four of the variables measuring the factor "uniqueness of the product offering" scored above a mean score of three, indicating an extremely positive influence on SA's competitiveness: wildlife (M=4.4), fauna & flora (M=3.6), wine & food (M=3.5) and friendly people (M=3.4).

When compared to Australia, South Africa is only regarded as much more attractive in terms of Wildlife (m=4.2) and only more attractive in terms of wine & food (m=2.0) as two of the positive influencers. Apart from also being regarded as more attractive in terms of world heritage sites (m=2.2) none of the other features present a distinct competitive advantage in this market. South Africa is also seen as far less attractive in terms of beaches (m=-3.2), less attractive in terms of sport events (m=-2.0), shopping/entertainment and conference and meeting facilities (both at m=-0.6) and slightly less attractive in terms of adventure tourism (m=-0.2).

When compared to Namibia, South Africa is seen as similar and only slightly more attractive in all aspects, with no outstanding competitive feature.

Once again, all five of the variables measuring "safety and security" have a negative influence on competitiveness, with Ebola (M=-2.7) having the most negative influence followed by crime (M=-2.6).

When compared to Australia, South Africa is much less attractive in all aspects of safety and security with the negative influencer crime (m=-4.2) as the least attractive variable followed by tourist safety (m=-4.0).

When compared to Namibia, South Africa is regarded as less attractive in terms of health risks (m=-1.0) and Ebola (m=-0.17), while being similar in terms of the other variables.

Figure 20 Mobility and infrastructure

Only "access to public transport" (M=-0.6) has a slightly negative influence on the competitiveness of SA, in terms of its mobility and infrastructure. The other variables have a more neutral influence on competitiveness, with "access to electricity" (M=1.1) having a slightly positive influence.
When compared to Australia, South Africa is regarded as less attractive in terms of all the variables, with the negative influencer ́access to public transport' being the least attractive (m=-3.0).
When compared to Namibia, South Africa is regarded as similar in terms of all the variables of mobility and infrastructure.

Figure 21 Value for money

"Exchange rates" (M=3.5) as well as "service quality" (M=3.5) have an extremely positive influence on SA's competitiveness. Respondents were more neutral on the influence of the cost of airfare (M=0.5) on competitiveness and regarded the cost of airline taxes (M=-1.2) as having a negative influence.

When compared to Australia, South Africa is regarded as more attractive than Australia across all of the variables of 'value for money', including the negative influencer 'cost of airline taxes'.

When compared to Namibia, South Africa is regarded as slightly more attractive in terms of the two positive influencers service quality (m=1.67) and exchange rate (m=1.33), but less attractive in terms of cost of airline taxes (m=-0.67) and airfare (m=-0.5).

Figure 22 Ease of access

Respondents from Germany felt neutral to slightly positive about all the variables measuring "ease of access". The variable "access to Africa via South Africa" (M=1.57) scored the highest mean score.
When compared to Australia, South Africa is regarded as slightly more attractive in terms of all the variables, with 'long haul flight' aspects making us more attractive (m=2.2).
When compared to Namibia, South Africa is regarded as similar in terms of entry requirements and border control, but slightly less attractive in terms of long haul flight aspects (m=-0.5) and visa regulations (m=-0.17).

Figure 23 Public perception

German tour operators felt positive about the influence of public perception on South Africa's competitiveness.

South Africa does not seem to benefit from the public perception factors as positive influencers when compared to the two competitors Australia and Namibia. The country is regarded as similar to both Namibia and Australia in terms of all three of the public perception variables; being slightly less attractive than Australia in terms of tourism branding and image (m=-0.4) and slightly less attractive than Namibia in terms of socially responsible practices (m=-0.17).

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Tourism
REPUBLIC OF SOUTH AFRICA

Table 19 Indian tour operator's long haul activities

These respondents indicated that their main source of information concerning South Africa, is provided by South African Tourism, followed by trade partners and workshops and conferences. Very few make use of social media for gathering information on South Africa.

Indian respondents indicated "wildlife" (M=4.2); "English is widely spoken" (M=3.7) and "adventure tourism" (M=3.6) as having an extremely positive influence on South Africa's competitiveness. None of the variables measured less than a mean score of two, indicating that the Indian market felt extremely positive about the variables making the product offering of SA unique.

When compared to Australia, South Africa only benefits from the positive influencer wildlife that makes the country more attractive (m=2.8). South Africa is regarded as similar or only slightly more attractive in all variables.

When compared to Kenya & Tanzania, South Africa is regarded as more attractive in terms of two of the positive influencers, Énglish widely spoken' (m=2.4) and ádventure tourism' (m=2.7). Furthermore, South Africa is regarded as either more attractive or slightly more attractive in all other variables. Given the importance of wildlife as a positive influencer, it

Unlike the traditional markets, Indian respondents indicated tourist safety as having a positive influence on SA's competitiveness (M=1.7). They feel more neutral about the influence of "health risks" (M=0.4) and "bribery and corruption" (M=0.4) on the competitiveness, and only slightly negative about "ebola" (M=-0.5) and "crime" (M=-0.2).
Compared to Australia, South Africa is seen as less attractive in all aspects of safety and security, with crime being the greatest deterrent (m=-1.7).
Compared to Kenya & Tanzania, South Africa is seen as similar and slightly more attractive across all the variables. It is important to consider that South Africa is seen as more attractive in terms of the two negative influencers Ebola and crime.

Figure 27 Mobility and infrastructure

All the variables measuring "mobility and infrastructure" have a positive influence, with "number and quality of conference centres" (M=2.6) the most positive influence.
When compared to Australia, South Africa is seen as similar and only slightly less attractive in terms of public transport (m=-0.04).
When compared to Kenya & Tanzania, South Africa benefits from all the positive influencers as the country is seen as more attractive across all the variables, with 'number and quality of conference centres' seen as the most attractive feature (m=2.61).

Figure 28 Value for money

"Value for money" was regarded as a factor having a positive influence on SA's competitiveness, with "quality of service" (M=3.2) measuring the highest mean score of the variables.

When compared to Australia, South Africa is seen as similar and only slightly more attractive in terms of all the variables.

When compared to Kenya & Tanzania, South Africa is again regarded as similar, but with the positive influencer 'quality of service' also regarded as the most attractive feature (m=2.36).

Figure 29 Ease of access

All five of the variables measuring "ease of access" are regarded as having a positive influence, even though they measured less than a mean score of 1.5, showing a more neutral influence.
When compared to Australia, South Africa is regarded as slightly less attractive in terms of other entry requirements (m=-0.4).
When compared to Kenya & Tanzania, South Africa is seen as similar and only slightly more attractive in terms of all the variables.

Figure 30 Public perception

"Public perception" is regarded as a positive factor, with tourism branding and image (M=3.2) again measuring the highest mean score.
When compared to Australia, South Africa does not benefit from the positive influencers 'public perception' as the country is regarded as similar to Australia.
When compared to Kenya & Tanzania, South Africa is regarded as more attractive across all three of the positive influencing variables.

Table 21 UK tour operator's long haul activities

In terms of the UK as a source market, results show that wildlife (M=4.5), followed by food & wine (M=3.9) and climate (M=3.4) are viewed as having the most positive influence on South Africa's competitiveness as a tourism destination.
When compared to Australia, South Africa only features as much more attractive in terms of wildlife (m=4.5). We are also much more attractive with regard to cultural diversity (m=3.2). We are more attractive, slightly more attractive or similar in all other aspects accept for beaches where we are slightly less attractive (m=-0.3).

With regards to safety and security, all the variables are marked as having a negative influence on competitiveness, with crime (M= -2.9) and Ebola (M= -2.5) indicated as the most negative.

When compared to Australia, South Africa is less attractive in all aspects of safety and security.

When compared to Kenya & Tanzania, South Africa is slightly more attractive in terms of bribery/corruption and health risks (both at m=1.0). We are less attractive than Kenya & Tanzania in terms of tourist safety (m=-2.0) as well as Ebola (m=-1.0).

of crime (-2.0).

When asked about mobility and infrastructure's influence on South Africa's competitiveness, respondents' felt more neutral. Even though more neutral, three of the four variables measuring this construct were still marked as having a positive influence, with only "access to public transport" marked as having a negative influence (M= -1.4) on competitiveness.

When compared to Australia, South Africa is regarded as slightly more attractive in terms of number and quality of conference centres (m=1.33). South Africa is regarded as less attractive in terms of the positive influencing factor ́access to public transport', as well as in access to electricity (m=-0.67).

Compared to Kenya & Tanzania, South Africa is regarded as more attractive in terms of number and quality of conference centres and the banking sector (both at m=2.5), but similar in terms of the positive influencing factor ́access to public transport'.

Figure 35 Value for money

Exchange rates and service quality had an equally positive influence (M=3.1) on competitiveness. Both cost of airfare and cost (M= -1.0) of airline taxes had a negative influence, with cost of airline taxes (M= -1.8) the more negative of the two.
When compared to Australia, South Africa benefits from the positive influencing factor ́exchange rate' as the country is seen as much more attractive (m=3.5). South Africa is also regarded as more attractive in terms of the second positive influencing factor ́service quality' when compared to Australia (m=2.0).
When compared to Kenya & Tanzania, South Africa again benefits from the positive influencing factor ́exchange rate' as the country is seen as much more attractive (m=3.5). However, South Africa is seen as less attractive in terms of cost of airfare (m=-0.5).

Access to Africa via South Africa (M=1.71) has the most positive influence on competitiveness, as part of the "ease of access" factor, followed by "long haul flights" (M=1.2) and "border control" (M=1.2).
When compared to Australia, South Africa benefits from the positive influencing factor 'long haul flights' as the country is seen as more attractive (m=2.0).
When compared to Kenya & Tanzania, South Africa is also regarded as more attractive in terms of 'long haul flights' (m=2.0). However, the stronger distinguisher when compared to Kenya & Tanzania lies with South Africa's visa regulations (m=3.0) as well as other entry requirements (m=2.5).

Figure 37 Public perception

All three of the variables measured as part of the factor "public perception" were seen as having a positive influence on competitiveness.
When compared to Australia, South Africa does not benefit from any of the positive influencers as the country is regarded as similar in terms of environmental management and socially responsible practices, and slightly less attractive in terms of tourism branding and image (m=-0.33).
When compared to Kenya & Tanzania, South Africa also does not benefit from any of the positive influencers as the country is regarded as similar in terms of all three variables.

(TTCI, 2013)

8.1 SAFETY AND SECURITY

Results show that Safety & Security is viewed by all source markets as having an extremely negative influence on South Africa's competitiveness. South Africa is also viewed by the UK market as far less attractive than its competitors Australia and Kenya in terms of this factor.

In terms of the indicators 'bribery & corruption' and 'crime', South Africa is much less attractive than both Australia and Kenya for the UK market.

The source markets UK, Germany, Brazil and USA regard the influence of Safety & Security as paramount, with 'crime' and 'Ebola' seen as the most problematic indicators (in SA). For the UK and USA markets 'crime' in SA is similar to crime in Kenya but worse than crime in Australia. For 'Ebola' South Africa is on par with Australia and

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8.2 MOBILITY AND INFRASTRUCTURE

Infrastructure in South Africa is well developed for the region, with air transport infrastructure ranked 43rd and a particularly good assessment of railroad quality (46th) and road quality (42nd) (TTCI, 2013: xxv-xxvi).

Overall, policy rules and regulations are conducive to the sector's development (ranked 29th); this is an area where the country has improved steadily over the past few assessments (TTCI, 2013: 25).

In terms of 'public transport' as indicator South Africa is less attractive in the UK, German, Brazilian and USA markets than Australia as competitor. While Germany and the USA regard the electricity situation in Australia as superior to that in SA.

The source markets UK, Germany and Brazil regard the influence of Mobility & Infrastructure as relatively important with only 'public transport' seen as an indicator that needs to be addressed (in SA). The Brazilian market sees 'public transport' in South Africa as much better than in Kenya; whereas Germany and the USA sees Australia as better than South Africa. India that ranks 65th overall with good transport infrastructure (39th) and reasonable ground transport (42nd) (TTCI, 2013) is positive toward South Africa's mobility and infrastructure if compared to Kenya, and relatively positive if compared to Australia.

8.3 VALUE FOR MONEY

South Africa has experienced an increase in fuel prices (77th) and ticket taxes and airport charges (105th) in 2013 that has diminished its price competitiveness (TTCI, 2013: xxvi, 25). Price competitiveness will remain a key differentiator across a variety

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10. LIMITATIONS

The fact that the study was cross-sectional prevented testing the influence of different current issues as they arose. For example, at the time of the survey Ebola was a new emerging issue that was included in the primary fieldwork, but visa regulations were not

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Question 2: Please indicate your primary tourism sector by selecting from the list:

Hospitality	
Transport (air)	
Transport (other)	
Events / Conferences	
Tour Operators	
Travel Agent/ Retail	
Attractions	
Education	
Public Sector	
Tourism Association	
Other	

Question 3: How long has your organisation been in operation

Less than a year	
Between 1 and 5 years	
Between 5 and 10 years	
More than 10 years	

Section 1

Question 1: Currently, South Africa's tourism vision is to be a top 20 tourism destination in the world. What do you think South Africa's tourism vision should be over the next 5 years?

Question 2: What are the burning issues that the South African tourism sector should attend to in the coming 5 years?

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Question 2
List the key factors that you think make South Africa MORE attractive to business tourists than any other tourist destination

Please provide three (3) concise answers for business tourism, ranking them in order of importance:

Most important	
2nd most important	
3rd most important	

Question 4
List the key factors that you think make South Africa LESS attractive to business tourists, than any other tourist destination.

Please provide three (3) concise answers for business tourism ranking them in order of importance.

Most important	
2nd most important	
3rd most important	

From an industry perspective

Question 5
What do you think the private sector involved in tourism is doing RIGHT to make South Africa more competitive?

Please list three (3) key factors for the private sector, ranking them in order of importance.

Most important	
2nd most important	
3rd most important	

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Question 7
What do you think the private sector involved in tourism is doing WRONG resulting in South Africa being less competitive?

Please list three (3) key factors for the private sector, ranking them in order of importance.

Most important	
2nd most important	
3rd most important	

Question 8
What do you think the public sector involved in tourism is doing WRONG resulting in South Africa being less competitive?
Please list three (3) key factors for the public sector, ranking them in order of importance.

Most important	
2nd most important	
3rd most important	

Question 2
Which markets do you think South Africa should focus on in future, and give a short reason for your answer?

Please rank them in order of importance, where 1 is the MOST important. You may include NEW markets and/or those markets mentioned in the previous question.

	Potential or new source market	Reason
Most important potential/new source market		
2nd most important potential/new source market		
3rd most important potential/new source market		
4th most important potential/new source market		
5th most important potential/new source market		

Thank you for your response. We appreciate your contribution.

If you have colleagues that you feel should also answer this survey, please provide their name and at least one method to contact them below. We will contact them directly.

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Contact Phone Number:
Email Address:

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