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Research Title:

# REGIONAL COMPETITIVENESS: AN EMERGING DOMESTIC MARKET SEGMENT PERSPECTIVE

DIVISION: TOURISM MANAGEMENT
UNIVERSITY OF PRETORIA



## FINAL REPORT

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## DEFINITIONS

| | |
|---|---|
| **Analytic Hierarchy Process (AHP).** | AHP is a rigorous technique that enables the integration of multiple judgments for studying how decisions are made (Crouch, 2007) |
| **Black middle class** | "…households residing in formal housing, having a water tap in the residence, having a flush toilet in the residence, having electricity as the main lighting source, having electricity or gas as the main cooking source, and having a landline or a household member having a cell phone" (StatsSA, 2012:1) A more sophisticated measure of lifestyle based on SAARF's LMSs identifies middle class households as those between LSMs 5-7 (Visagie & Posel, 2013:151). |
| **Competitiveness** | "Competitiveness means jobs, wealth, improved living conditions, and an environment in which residents can prosper." (Ritchie & Crouch, 2003:12). It may also be defined as "… 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). |
| **Critical success factors** | "Critical success factors are the resources, skills and attributes of a destination that are essential to deliver success in the marketplace" (Lynch in Jonker, 2003). They are critical to the attainment of the destination's vision, mission and long-term goals; can be either internal or market related; are limited areas of success that will ensure overall competitiveness; and are result areas in which success can be measured (adapted from Jonker, 2003:61). |
| **Destination** | "A defined geographic region which is understood by its visitors as a unique entity, with a political and legislative framework for tourism marketing and planning." (Buhalis, 2000:98). "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). Also "a place for consumption of tourism, a complex entity, a set of symbols and images, and a community" (Marzano, 2007:19). |
| **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. |

| | |
|---|---|
| **Domestic tourism** | "The tourism of resident visitors within the economic territory of the country of reference" (NDT 2011:vii). For the purposes of this study domestic tourism will be further segmented into provinces as economic territories within in South Africa |
| **Domestic tourist** | For the purposes of this study a domestic tourist is an individual travelling for leisure purposes outside his/her province of residence and fulfils the criteria for the emerging market as defined in this study. |
| **Emerging market** | Emerging markets are population groups entering the market in increasing numbers as domestic tourists, especially those previously neglected (DEAT, 1996). This is a generic term that means Africans, Coloureds and Indians (NDT, 2011). Note that in this study no distinction is made between the various ethnic groups that exist within the black African population group. |
| **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) |
| **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). A theoretical model is a representation of the way in which a particular framework operates. From a theoretical model, one can be able to know how, where and when to engage in a particular issue. |
| **Regional competitiveness** | The ability of some regions to compete with one another in some way, both within and between nations, to grow and prosper in economic terms (Borozan & Strossmayer, n.d:59). ***In the context of this study, the word regional will refer to provincial.*** |
| **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) |

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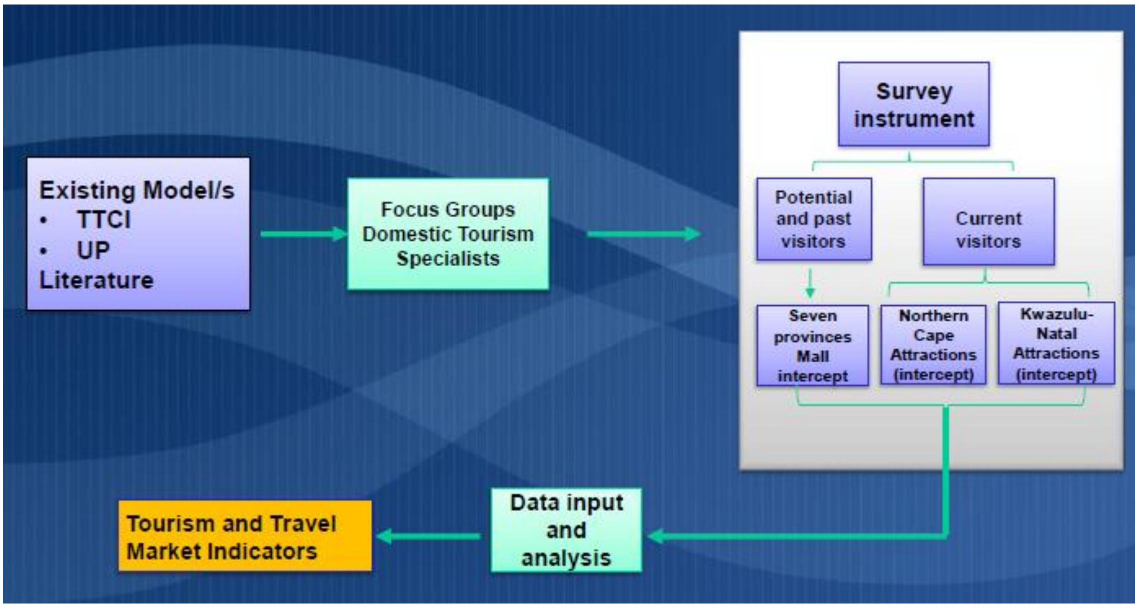
## EXECUTIVE SUMMARY

### The Tourism and Travel Market Indicators Index

The overall aim of the study was to develop a model to assess provincial competitiveness and apply the model to selected provinces in South Africa. The study was conducted from an emerging domestic market viewpoint, based on selected sub-segments. The study is based on the premise that factors and indicators that are relevant to different regions must be identified, both those that are relevant for any destination, as well as those that are specific to particular destinations. Factors and indicators were identified and validated empirically though focus groups and a sample of emerging tourists in all provinces in the country. Factor analysis was used to create the dimensionality of factors under which the indicators could be grouped, the outcome of which was the so-called Tourism and Travel Market Indicators Index. The process followed to develop this index is shown graphically in figure ES1 as the research process:

**Figure ES1: The Research Process**




The Tourism and Travel Market Indicators Index generated in this study is shown in Table ES1:

**Table ES1: The Tourism and Travel Market Indicators Index**

| Factor | Indicators |
|---|---|
| **Quality and infrastructure** | - Value for money/affordability<br>- Clean/hygienic environment<br>- Attitude of local toward tourists<br>- Signage<br>- Transport infrastructure<br>- Electricity<br>- Water<br>- Service quality<br>- Safety and security<br>- Healthcare services<br>- Internet |
| **Marketing and social responsibility** | - Tourism brand and image<br>- Information on offering<br>- Packaged tours<br>- Environmental responsibility<br>- Transformation |
| **Primary product features** | - Unique feature<br>- Climate<br>- Wildlife<br>- Nature reserves/national parks<br>- World Heritage Sites<br>- Recent history |
| **Secondary product features** | - Adventure activities<br>- Beaches<br>- Entertainment<br>- Alternative routes<br>- Public transport<br>- Car rental service |
| **General maintenance and product character** | - Upgrade of general infrastructure<br>- Maintenance around tourist attractions<br>- Upkeep attractions facilities<br>- Authentic products/services<br>- Product variety |
| **Overall experience and accessibility** | - Culturally sensitive businesses<br>- Family friendly environment<br>- Distance traveled<br>- Facilities for disabled |

The Index was applied to assess the tourism competitiveness of two provinces, Kwazulu-Natal and the Northern Cape, the result of which is depicted in figure ES2.

**Figure ES2: Northern Cape vs Kwazulu-Natal – Perceptions of tourists who have visited and who have not yet visited**

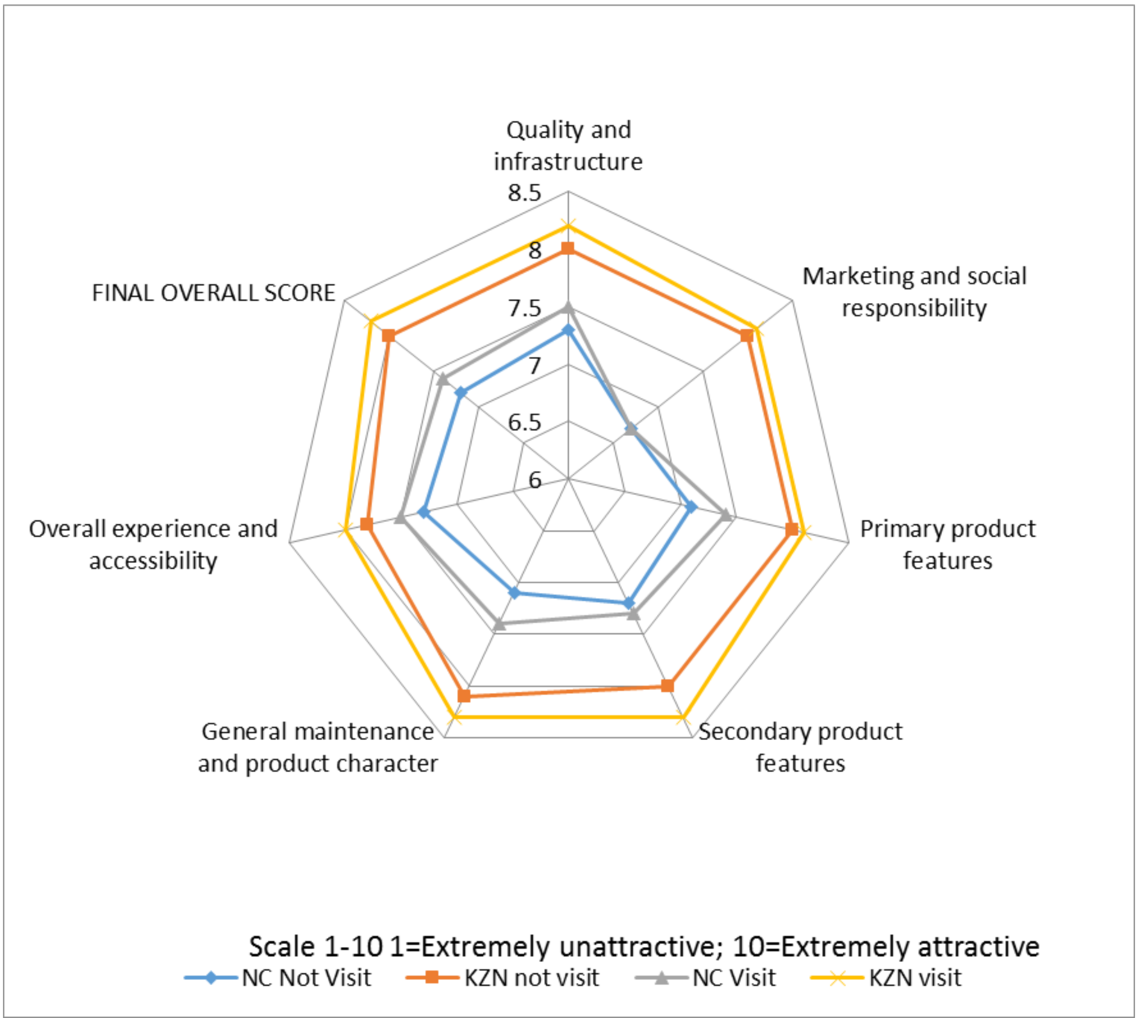


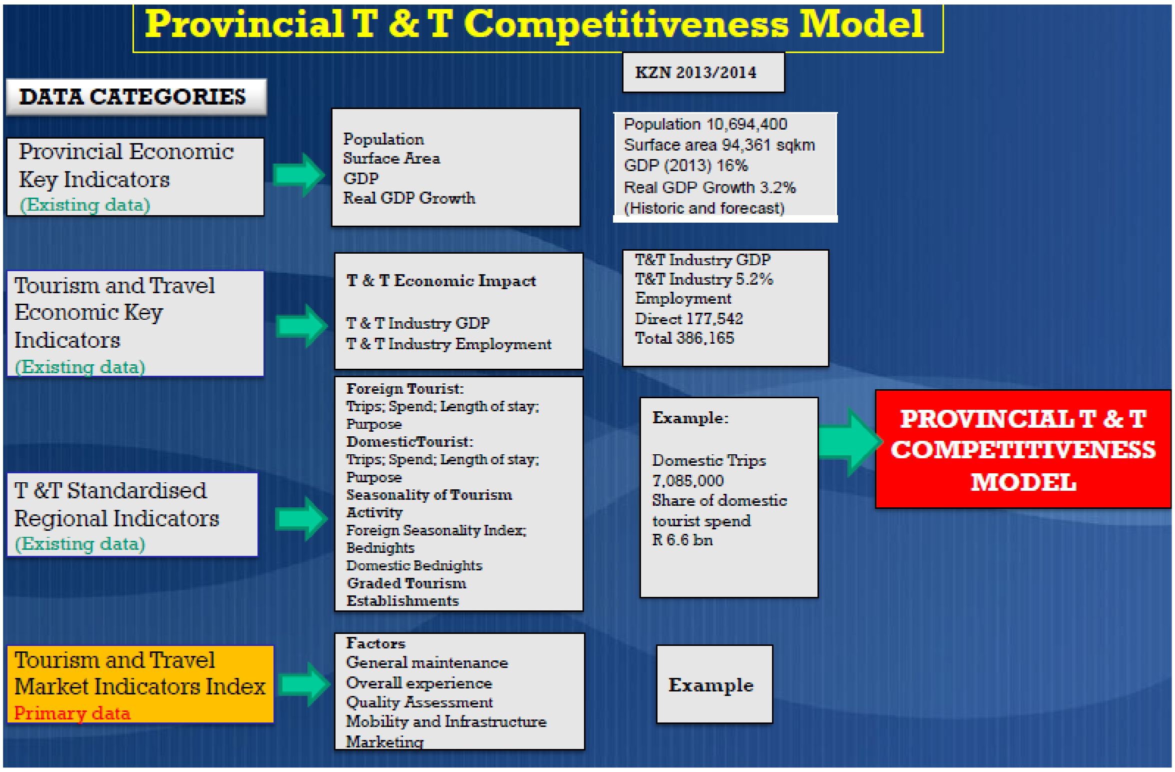

Figure ES2 indicates that the Northern Cape achieved an overall score of 7.4 by people who have visited and 7.2 by people who have not yet visited the province. KwaZulu-Natal achieved a score of 8.2 by people who have visited and 8 by people who have not yet visited the province. In all instances the scores achieved for past visitors (experiences) were higher (one case equal) than for potential visitors. KwaZulu-Natal has a stronger record in terms of positive visitor experiences, as well as a positive record based on perceptions among potential tourists.

## The Provincial Tourism and Travel Competitiveness Model

The factors and indicators that are used to measure the competitiveness of a tourism destination or region can be seen as the actual index. This index, however, must also be viewed within a broader context. Therefore this study proposes the use of a standardised Provincial Tourism Competitiveness Model using four data categories (as shown in figure ES3). These categories are the:

1. Provincial Economic Key Indicators (Data available from StatsSA and relevant Government sources)
2. Provincial Tourism and Travel Economic Key Indicators (as per data collected for the Tourism Satellite Account - StatsSA)
3. The standardised Provincial Indicator Table (the T & T Standardised Regional Indicators as developed by the Provincial Indicator Working Group and approved by the NDT in December 2012)
4. Tourism and Travel Market Indicators Index (primary data collection

**Figure ES3: The Provincial T&T Competitiveness Model**



The first three categories should be populated through existing data and tools available to the province and the fourth through primary data collection. A gap that was evident in this research is that not all provinces have access to data on their province, the case in point is that of the Northern Cape which lacks a great deal of tourism-related economic data. This is an area of concern.

The fourth category relies on the collection of primary data on the factors and indicators identified in this study and referred to as the Tourism and Travel Market Indicators Index. Data should be collected from tourists and industry to enable provinces to be compared on tourism-related factors.

The model should be applied in regular cycles to assess if progress has been made since the previous cycle of measurement and to identify areas of concern. The key economic indicators provide the context within which the index should be interpreted. The recommendation in this study is thus that a distinction be made between the index, which measures the tourism competitiveness of the province against certain factors and indicators (the empirical work done in this study), and a broader model which includes key economic indicators of the province and its tourism key economic indicators, providing the context for assessing the province's tourism competitiveness.

## 1. INTRODUCTION

Any study that considers the tourism competitiveness of a region, be it internationally or regionally, must consider models and indices that have been developed for this purpose, evaluating those that are deemed most appropriate to guide such a study. The most well-known global tourism competitiveness index is that of the World Economic Forum, the Travel and Tourism Competitiveness Index (TTCI). The TTCI measures tourism competitiveness based on numerous factors and indicators related to sub-indices such as the enabling environment within which tourism functions, travel and tourism policy and enabling conditions, infrastructure and natural and cultural resources. Other tourism competitiveness indices, both in academia and industry have been developed, and there is a continuing debate on what factors and indicators are appropriate for inclusion in such an index. In the study conducted by the Division of Tourism Management in 2014 on the global competitiveness of South Africa as a tourist destination it was concluded that not all factors and indicators are appropriate to all countries and that provision should be made to include those factors and indicators that may better reflect the uniqueness of destinations and regions. This study focusses on provincial tourism competitiveness and is based on the premise that factors and indicators that are appropriate to regions must be identified, both those that are considered by tourists and industry to be important for any destination, as well as those that are specific to a particular destination.

The factors and indicators that are used to measure the competitiveness of a tourism destination or region can be seen as the actual index but this index must also be seen within the broader context of the geographic spread and economy of the destination or region as well as the economic impact of the tourism industry in that region or destination. The key economic indicators provides the context within which the index should be interpreted. The recommendation in this study is thus that a distinction be made between the index, which measures the tourism competitiveness of the province against certain factors and indicators, and which forms the empirical work done in this study, and a broader model which includes key economic indicators of the province and the tourism key economic indicators of the province, providing the context for assessing the province’s tourism competitiveness. The report begins by providing the purpose and rationale of the study, a brief literature overview and the scope of the study. Thereafter the development of the index for measuring a province’s tourism competitiveness empirically is described and the index is applied to two provinces which are then compared. The study ends with a recommendation on what should be included in a Travel and Tourism Regional Tourism Competitiveness Model.

## 2. PURPOSE OF THE STUDY

The overall aim of the study was to develop a model that can be appropriately applied to assess provincial competitiveness and apply the model to selected provinces in South Africa. The study was conducted from an emerging domestic market viewpoint, based on appropriate sub-segments, taking those previously identified by SA Tourism into account. The rationale for the study is grounded in the increasing importance of regional competitiveness and domestic tourism as part of a sustainable tourism economy at national level. Nine activities were identified to guide the research project towards the development of a model to measure provincial tourism competitiveness.

## 3. RATIONALE FOR THE STUDY

The National Department of Tourism has recognized domestic tourism as one of the key contributors to the economy (DEAT, 2004; Rogerson & Lisa, 2005:89). Until recently, government planners and policy makers of developing countries have focussed more on international tourism and ignored the potential benefits from the emerging domestic tourist market (Scheyvens, 2002:143; Rogerson & Lisa, 2005:88). Thomas (2005:38) specifically mentions the neglecting of domestic tourism research across Africa. Successful tourist destinations have very strong domestic tourism markets of roughly 70% and an international tourism market of 30%. South Africa, while improving, differs quite significantly as we have a 54% domestic tourism expenditure and a 46% international tourism expenditure (WTTC, 2015). The growth of domestic tourism could be stimulated by a growth in citizens' income; an increase of leisure time; structural adjustment of the national economy; and the involvement of the local government in policy making (Wang & Qu, 2004). Furthermore, the development of domestic tourism can be greatly encouraged by the involvement of government (Wu, Zhu & Xu, 2000:298).

Given the importance of domestic tourism, it is argued that competitiveness of the various regions (or in the case of this study, provinces) serving this market is of utmost importance. Such competitiveness will be the ability of the region (province) to optimize its attractiveness for domestic tourists, to deliver quality, innovative, and attractive tourism services to consumers and to gain market share in the domestic market place, while ensuring that the available resources supporting tourism are used efficiently and in a sustainable way. Competitiveness at regional (provincial) level will ultimately transpire into national competitiveness as issues of supply (quality, quantity, spread) are addressed at grassroots level.

## 4. LITERATURE OVERVIEW

### 4.1 Promoting domestic tourism among relevant market segments

During the recent global financial crisis, the tourism industry's direct contribution to worldwide gross domestic product (GDP) dropped from 3.08% in 2007 to around 2.86% at the lowest points in 2010 and 2011. Making a relatively fast recovery however to 3.1% in 2013 and with a predicted growth of up to 4.4% in 2023, the industry once again demonstrated its resilience (WTTC, 2013). Amidst this volatility, destinations worldwide are increasingly turning toward domestic tourism as contributor to a sustained tourism economy (Smeral, 2010). It is stated that a vibrant domestic tourism sector can "cushion the industry from fluctuations of the international tourism market and bring stability and predictability in the industry" (Okello *et al,* 2012:79). Domestic spending makes up the largest part of worldwide travel spend (70.7% in 2012) and also has a slightly larger expected growth at 4.6% in 2023 (WTTC, 2013). The continued growth in domestic tourism is linked to the trend for shorter holidays closer to home, a phenomenon referred to as 'staycation' (Papatheodorou *et al.,* 2010) and global trends indicate that tourism is becoming a regional/national rather than a global phenomenon (NDT, 2011a).

South Africa represents one of the few examples of a developing country where the national government has made domestic tourism an explicit priority (Rogerson & Lisa, 2005). The National Department of Tourism (NDT) has identified increasing domestic tourism's contribution as a percentage of the overall tourism contribution to GDP from 54.8% in 2009 to 60% by 2020. Strategies to achieve this include increasing domestic tourism expenditure, tourist volumes and enhancing a travel culture among South Africans (NDT, 2011b). The emerging black[1] domestic market for leisure tourism presents a distinct opportunity to achieve these objectives, given the significant growth potential in terms of size and spending power displayed by this market segment (NDT, 2011a; Visagie & Posel, 2013). For demand to be effective, tourists must be aware of a destination and its specific offerings. There must also be a "fit" between the types of experiences generated by these products and consumer expectations. However, previous research has indicated current mismatches between demand and supply within the different provinces of South Africa for specific domestic market segments (Lubbe *et al*., 2012). Despite promotional efforts which started some 20 years ago (Rogerson & Lisa, 2005), domestic trips have shown a decline and a call has been made to the industry to respond with product offerings that appeal to members across all market segments (NDT, 2011a). Such initiatives will arguably fail without sufficient market knowledge, as is the case in most developing markets (Ghimire, 2013).

By 2011 only 44% of the total South African adult population was said to be participating in domestic travel, though this number has been showing improvement (NDT, 2011a). Although VFR remained the major purpose of domestic travel, its share decreased by 5% from 77% to 72% in the period July to September 2013 compared to the same period in 2012. The biggest inhibiting factors have been identified as the perception that travel is not affordable and that people have no reason to take a trip (NDT, 2011a; SAT, 2013). There seemingly remains the tendency to travel for the purpose of visiting friends and relatives (VFR) (Rule *et al*., 2003; SAT, 2013), despite campaigns to encourage holiday travel that is associated with higher levels of spending (NDT, 2011a; Rogerson & Lisa, 2005).

### 4.2 Defining the domestic tourism market under investigation

Within the South African context, emerging markets are population groups entering the market in increasing numbers as domestic tourists, especially those previously neglected (DEAT, 1996). Gradual improvement in the socio-economic position of the black population in the country has led to an expected growth of this segment to become a greater part of the domestic tourism market. This trend fits in with a global trend across many developing countries where leisure travel is no longer the

[1] Generic term that means Africans, Coloureds and Indians (NDT, 2011). Note that no distinction is made between the various ethnic groups that exist within the black African population group.

exclusive privilege of the upper classes, but where growth is extending beyond the growing middle class to include members of the lower middle class participating in leisure travel (Rogerson, 2004).

As an outcome of government initiatives taken after apartheid, there has been the growth of a substantial black middle class (Donaldson *et al*., 2013; Rogerson & Lisa, 2005; Visagie & Posel, 2013). Recent analyses of the 'affluent households' by racial group disclosed major shifts in the composition of the affluent in South Africa; unfortunately mostly being in an unequal manner even within racial groups (Leibbrandt *et al*., 2012; Tregenna & Tsela, 2012). Visagie and Posel (2013) define the African middle class as African households that received a total household income in excess of R12 000 a month and fall into the LSM 9 and 10 groups. Within a timespan of eight years (2004 to 2012), the middle class in South Africa rose from 1.6 to 4.2 million adults. Of these 4.2 million adults, 51% were black, 34% white, 9% coloured and 6% Indian; representing a dramatic shift from the 2004 proportions in the first two categories: 52% white, 32% black, 10% coloured and 6% Indian (Visagie & Posel, 2013). In the Income and Expenditure Survey (IES) 2010/2011, black households showed a 34.5% income increase over one year (StatsSA, 2012). Despite this growth, very little research has been focused on the ethnocentric tendencies and buying behaviour of the emerging black middle class as a consumer market (Goldberg & Jansen van Rensburg, 2013). With a duality of social identities emerging within this market, also known as the 'black diamonds', much remains to be researched (Donaldson *et al*., 2013). Similarly, little research has been done to tap into the emerging black middle class as a tourist market; with research in this field being fragmented and lacking cohesion from the researchers (NDT, 2011a).

In this study, and for the purposes of data collection, the emerging domestic market was defined as follows:

**An emerging domestic tourist is an individual travelling for leisure purposes outside his/her province of residence who falls within a population group that is entering the market in increasing numbers as domestic tourists, especially those previously neglected (DEAT, 1996). Emerging market is a generic term that means Africans, Coloureds and Indians (NDT, 2011). In this study no distinction is made between the various ethnic groups that exist within the black African population group.**

The NDT and SAT's domestic tourism growth strategy identified 5 market segments that are regarded as 'emerging domestic market' segments. Considering the definitions of an emerging market and the South African context, these market segments may need to be re-evaluated and a more relevant definition developed for purposes of this study. Results of the current study may also lead to new findings in terms of the characteristics of the market and may indicate possible changes to currently used segments.

### 4.3 Regional (provincial) competitiveness

Tourism is an economic growth engine with a particular focus at regional level, but its national impact remains important. At a regional level, tourism is presented as an essential tool for development and economic growth, believed to be one of the mechanisms used to avoid economic stagnation. Understanding competitiveness in tourism at a regional level is important for policy makers and a major challenge for professionals in providing evidence to inform decision-making. The importance that tourism has acquired for national economies is evidenced by the intensification of competition between tourist destinations. The choice of a region as a tourist destination by tourists means more income, employment and tax revenue for the region that receives these tourists. For this reason, the identification of the factors that favour or inhibit tourist-related activity becomes fundamental for the strategic planning of these regions. Various indicators have been developed around the world by different organisations to address particular aspects of competitiveness but there remains a lack of development of appropriate indicators to assess regional competitiveness from a specific market segment viewpoint.

Borozan and Strossmayer (n.d:59) defined regional competitiveness as the ability of some regions to compete with one another in some way, both within and between nations, to grow and prosper in economic terms. Regional competitiveness is not a pure derivative of national competitiveness primarily due to differences between national macro-economy and regional economy. Important differences arise from the fact that competitiveness at national level is much higher and more heterogeneous than it is at the regional level. Furthermore, national government has greater power, more available macro-economic adjustment mechanisms and instruments for influencing private, public and the non-profit sector, as well as the behavior of the whole economy, than does a regional government. Therefore, the concept of macro-economic competitiveness cannot be completely applied to the regional level.

Tourism competitiveness for a region is about the ability of the region to optimize its attractiveness for domestic and international tourists, to deliver quality, innovative, and attractive tourism services to consumers and to gain market share on the domestic and global market places, while ensuring that the available resources supporting tourism are used efficiently and in a sustainable way.

Competition among regions creates an environment of excellence. While the bulk of the discussion on the competitiveness of regions and nations as appearing in the general literature focuses on supply-related items, demand factors assume special importance in determining destination competitiveness. The reason for this is that a destination may be competitive for one segment of the market but not for another segment, depending on their motivations for travel. Thus travelers motivated by sunshine, for example, will prefer a destination featuring beaches, resort hotels, or sky slopes, rather than one that has heritage resources located in remote areas.

## 5. THE SCOPE OF THE STUDY

The overall aim of the study was to develop a model that could be appropriately applied to assess provincial competitiveness and apply the model to selected provinces in South Africa. The study was conducted from an emerging domestic market viewpoint. The scope of the study included the following activities:

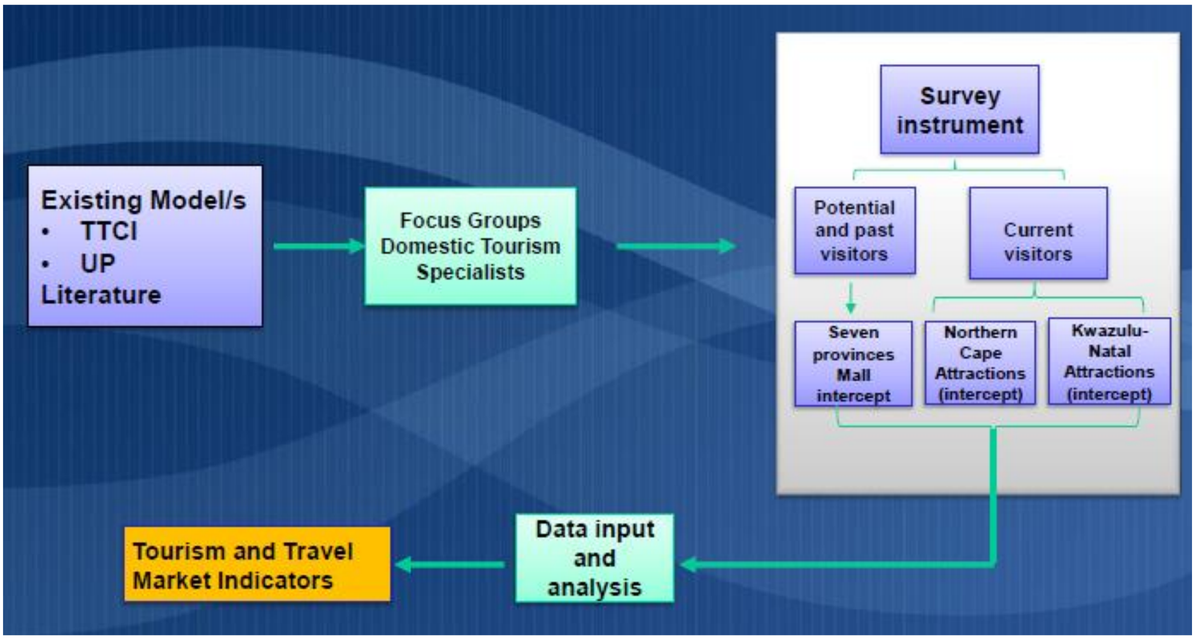
Activity 1: Defining the domestic tourism market under investigation
Activity 2: Identifying the key factors of regional competitiveness
Activity 3: Verifying the relevance of the factors within the regional context.
Activity 4: Developing a survey instrument for application to the selected domestic tourism market
Activity 5: Selecting provinces for application
Activity 6: Sampling of respondents
Activity 7: Developing a revised provincial competitiveness model for South Africa

Activity 8: Incorporating aspects of the current provincial indicators into the model

Activity 9: Applying the model

## 6. THE RESEARCH PROCESS

The outcome of the empirical research process was to identify the factors and indicators that would measure the tourism competitiveness of a province against other provinces, in other words to develop a set of factors and indicators (hereafter referred to as the Tourism and Travel Market Indicators) to measure the demand and supply side of tourism in a province. Demand and supply factors were identified and tourists' perceptions of these factors were measured.




The process began with an overview of current models (more particularly the model developed in the 2014 study by UP on global competitiveness) and literature focussing on regional competitiveness. From these sources indicators were extracted that could potentially be included in the so-called Tourism and Travel Market Indicators Index. Thereafter the indicators were verified through focus groups. The final questionnaire was developed and applied in two provinces after which data was analysed resulting in the formulation of the Tourism and Travel Market Indicators Index which includes indicators that have been statistically validated and can be used to measure the tourism competitiveness of each of the nine provinces from the tourists' perspective. Each stage is described in more detail below.

### 6.1 Identifying the key factors of regional competitiveness (literature)

The development of any model of competitiveness and an associated set of indicators allows identification of the relative strengths and weaknesses of different tourism destinations, and can be used by industry and governments to increase tourism numbers and expenditure, and enhance socio-economic prosperity. The development of a set of competitiveness indicators might serve as a valuable tool in identifying what aspects or factors influence tourists in their decision to visit destinations. Many of the indicators identified for competitiveness at a national level should also be relevant at a regional or intra-country level, but some indicators may differ in importance or may change in the dimension in which they are applied (Dupeyras & MacCallum, 2013). A number of sources were identified that shed light on factors specifically related to regional competitiveness (refer to Appendix A). A conceptual index of factors and indicators was developed based on these sources[2].

### 6.2 Verifying the relevance of the factors within the regional context (empirical)

A modified format of a focus group was held with representatives from various local municipalities attending a capacity building course for tourism practitioners presented by the University of Pretoria at the Protea Hotel Hatfield on 26 June 2015. Due to the size of the group it was decided to have a discussion on a questionnaire with both closed and open-ended questions. Factors used in the international competitiveness survey were included, along with one open ended question where respondents could provide any other factors they deemed important, as well as one ranking question where they had to list the top 5 most important factors from both a supply and demand perspective to enhance domestic competitiveness. The profile of the focus group participants also matched the demographic characteristics of the intended survey population.

A second focus group was held on 22 July 2015 at the offices of the National Department of Tourism (NDT) in Pretoria, with three representatives from the NDT and three representatives from SA Tourism

[2] The necessary ethics clearance was obtained to proceed with the empirical phase (see Appendix B).

(SAT). The purpose of the focus group was to gain an understanding of supply side issues within the tourism industry that influence the industry's ability to satisfy the emerging domestic market, as well as to grasp the needs of the domestic emerging market and the extent to which existing products are capable of catering to their needs.

The results of the focus groups are presented in Appendix D. These results were used to determine the factors and indicators to be included in the survey among domestic tourists, in other words, the factors and indicators that tourism experts/practitioners deemed would be important to domestic tourists.

### 6.3 Development of final questionnaire

**A structured questionnaire** was developed based on the results of focus groups (refer to Appendix C for a copy of the questionnaire). The aim of the questionnaire was two-fold: to verify the importance of the various indicators and to determine the performance of two selected provinces against the indicators. For this purpose the Northern Cape and KwaZulu-Natal were chosen – the motivation of which will subsequently be explained in section 5.4.

By using an adapted version of the scale of the international competitiveness study to test the factors in a domestic context, the capacity building course focus group provided an ideal opportunity to pilot the questionnaire among individuals that fit the profile of the potential tourists for the questionnaire. Industry experts also provided input into the questionnaire as part of a pilot. Lastly academic experts were used to test the online version of the questionnaire created on Qualtrics. Adjustments were made according to appropriate comments and suggestions made by the respondents in the pilot phase.

The questionnaire consisted of four main sections:

A: Demographic profile of respondents

B: Travel behaviour

C: Factors of importance when choosing any holiday destination

D: Evaluation of the two case study provinces (KwaZulu-Natal and Northern Cape)

## 6.4 Selected provinces for application of survey instrument

***Northern Cape***

The Northern Cape is the largest of South Africa's provinces but has the smallest population, making it one of the more remote areas of the country. Among its key selling points are its vast, open spaces, unique vegetation – including the beautiful spring flower spectacle of the Namaqualand National Park that transforms a semi-desert landscape – and the Kgalagadi Transfrontier Park. There are a total of five SANPark game reserves in the province (others include Mokala, Augrabies Falls and the Richtersveldt). The Northern Cape's fascinating lunar-like landscapes, ancient cultures and incredible national parks make this a must-visit province for anyone that loves the great outdoors and has a sense of adventure.

The Northern Cape Provincial Growth and Development Strategy (2011) states that the biggest challenge hindering growth and development in the Northern Cape Province is the reduction of poverty. There are also various other social challenges that the province faces, such as providing for the basic needs of the society (water, sanitation and housing), the rate of TB, HIV and AIDS, the lack of job opportunities, contact crime and the various vulnerable groups in the province. The Northern Cape Provincial Growth and Development Strategy also indicated the following long-term sustainable economic and developments in the following sectors to reduce poverty (NCPG 2011:25): Agriculture & Agro-processing; Fishing and Mari culture; Mining and mineral processing; Manufacturing; Tourism; Knowledge Economy and Energy.

Even though politicians and media reports hyped up the prospects of the SKA (Square Kilometre Array) breathing new life into the Northern Cape's economy after SA won the international bid to host the telescope in 2012, the anticipated property and tourism boom simply hasn't materialised.
(http://www.bdlive.co.za/business/innovation/2015/05/12/ska-telescope-brings-big-bang-but-no-boom-to-small-karoo-town)

The latest domestic statistics (SAT, 2014) show that compared to other provinces the Northern Cape has the lowest share of total domestic tourist trips in the five-year period from 2009-2013. These results suggest that the province remains the least preferred destination for domestic tourists that could possibly be explained in terms of the vast size of the province making tourism products widely spread. The distances to travel in the provinces results in tourists spending most of their time travelling on the road which discourages potential tourists. More than 75% of total expenditure on overnight trips can be attributed to black Africans (SAT, 2014). Results show that black Africans accounted for most expenditure in seven of the nine provinces. In Northern Cape and Western Cape, white tourists accounted for most of the expenditure. Shopping was the main reason people travelled to provinces such as Eastern Cape, Northern Cape, Free State, North West, Mpumalanga and Limpopo.

Tourism development will attract more tourists to the area and its attractions. Local families would be able to see their families more regular, reducing the negative social impacts. It will also educate the young population about tourism so that they in future, can become tourists themselves. For these reasons it was decided to include the Northern Cape when evaluating regional competitiveness from an emerging domestic market segment perspective.

***Kwa-Zulu Natal***

KwaZulu-Natal is South Africa's third-smallest province, with a wealth of scenic and cultural attractions that include the country's most popular beaches lying to the south and north of Durban. The province is also home to two World Heritage Sites: the iSimangaliso Wetland Park and the uKhahlamba-Drakensberg Park, making it a popular choice with tourists. Ezemvelo KZN Wildlife manages 48 nature reserves in the province.

The latest domestic statistics (SAT, 2014) shows that KwaZulu-Natal continues to remain the preferred destination by domestic tourists as it accounts for the highest share of total domestic tourist trips when compared to other provinces. However, the province experienced a decrease in the number of total domestic tourist trips in the five-year period from 2009-2013. In 2009, KZN accounted for 9 073 551 domestic tourists, which declined to 7 085 000 in 2013. This might be attributed to a decrease in the total number of domestic tourist trips, year on year, since 2010. Results show that, although there was a decrease in total spend by domestic tourists in KwaZulu-Natal from R6.6 billion in 2009 to R4.8 billion in 2012, and increased up to R6.6 billion in 2013, the province received the largest total spend from domestic tourists. Research shows that travellers visited Gauteng and KwaZulu-Natal provinces to visit friends and relatives.

It is evident that KwaZulu-Natal continues to receive by far the largest number of domestic tourists travelling for VFR purposes, with 4 995 000 in 2012, to 5 336 000 in 2013. This is a historical trend, brought about by the largest concentration of population in the country in Gauteng, but the nearest coastal destination being Durban, in KwaZulu-Natal. People from inland areas such as Gauteng traditionally travel, during holiday periods, or at least once a year, to the coast, mainly Durban and the South Coast, in order to visit or stay with friends or relatives in the area while enjoying a seaside holiday. *This situation and tourist behaviour pattern has changed very little since even as long ago as the 1950s. Emerging tourists, too, tend to stay with friends or relatives at a coastal holiday destination so as to enable them to be able to afford the holiday through not having to pay high – or any – accommodation costs.*

Even though the figures above show that KwaZulu-Natal is the most visited province in terms of domestic tourism, it is still worrying that the number of trips to the province and money spent in the area are decreasing, and for these reasons it is important to include the province in the current study.

### 6.5 Administering the survey

The survey was administered between 17 August and 16 October 2015. Contact was made with academic colleagues as well as public sector representatives in eight of the nine provinces to request their assistance in identifying suitable fieldworkers. A total of 31 fieldworkers were used (refer to Table 1).

**Table 1: Fieldwork areas and assistance**

| Province | City/town | Fieldwork assistance | Number of fieldworkers |
|---|---|---|---|
| Eastern Cape | Port Elizabeth | Mr Hugh Bartis<br>Nelson Mandela Metropolitan University | 2 |
| Free State | Bloemfontein | Dr René Haarhoff<br>Central University of Technology | 2 |
| Gauteng | Pretoria & Johannesburg | University of Pretoria | 5 |
| KwaZulu-Natal | Durban | Dr Judy Mann<br>South African Association for Marine Biological Research | 2 |
| Limpopo | Polokwane | Dr Annemie de Klerk | 4 |

| | | | |
|---|---|---|---|
| | | *Department of Economic Development, Environment and Tourism* | |
| Mpumalanga | Nelspruit | Ms Leane Grobbelaar<br>Tshwane University of Technology (Mbombela campus) | 4 |
| Northern Cape | Kimberley | Mr Andile Mlawu<br>Northern Cape Department of Economic Development and Tourism | 4 |
| Northwest | Potchefstroom | Ms Kristel Fourie<br>African Centre for Disaster Studies<br>North West University<br>Potchefstroom Campus | 4 |
| Western Cape | Cape Town | Prof Kamilla Swart<br>Cape Peninsula University of Technology | 4 |

Each fieldworker was provided with a unique fieldwork number and received a letter instructing them on the fieldwork process. Where possible, the initial contact person guided this 'training' process. Fieldworkers also had to familiarise themselves with the survey by utilising the online hyperlink to the survey. Tablets were couriered to the various contact points and fieldworkers accessed the survey via a hyperlink.

### 6.6 Sample respondents

Surveys were conducted in all nine provinces among:

(i) Individuals that had previously travelled to or were travelling within the Northern Cape and/or KwaZulu-Natal (either as tourists or as transit travellers) – testing experiences.

(ii) Individuals that are potential future visitors (have not travelled to these two provinces) – testing perceptions.

The focus was on individuals from the lower middle class upwards and included Black, Indian and Coloured individuals. Fieldworkers focused on finding respondents at suitable shopping centres and suburbs. Using their local expertise assisted in reaching the correct profile of respondents. Individuals were sampled through intercept surveys (convenience sampling).

## 7. DATA ANALYSIS

Data analysis used the statistical software SPSS. Demographics and trip behaviour were analysed in terms of descriptive statistics such as the mean, median, and frequencies. The rating of the importance of factors were analysed with descriptive statistics, but then followed up by further analyses including Exploratory Factor Analysis to determine dimensionality. The scales comparing the performance of the two provinces are analysed in terms of descriptive statistics, but then comparisons were made through means of t-tests to test the performance of the two case studies in relation to the various factors.

# 8. RESULTS

## 8.1 Demographics of the sample

The final sample included 1065 individuals. The vast majority was from the Black racial group, with an almost equal gender representation and an average age of 34 (minimum 18 years, maximum 77 years). Majority was single and resided in the province of Limpopo. Most were educated to the level of a national diploma/certificate and earned R20 000 and below per month (refer to Figures 1 – 6).

**Figure 1: Racial groupings**

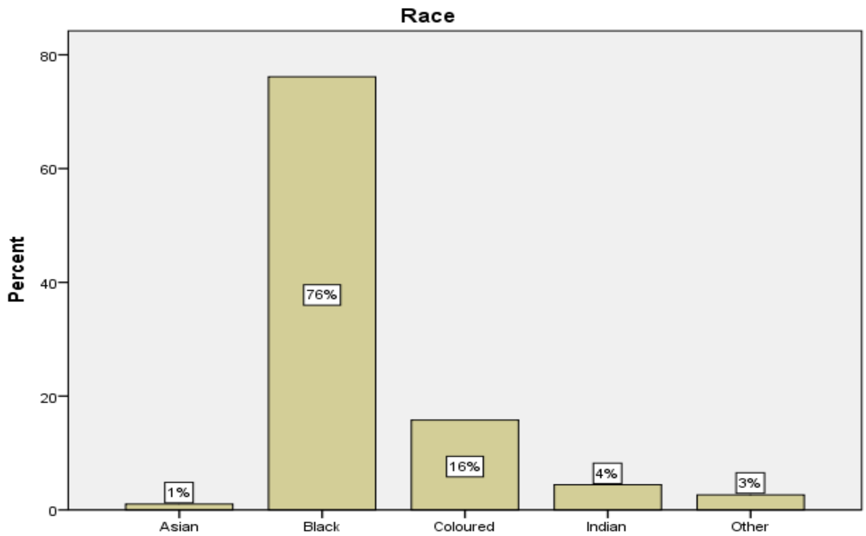



**Figure 2: Gender profile**

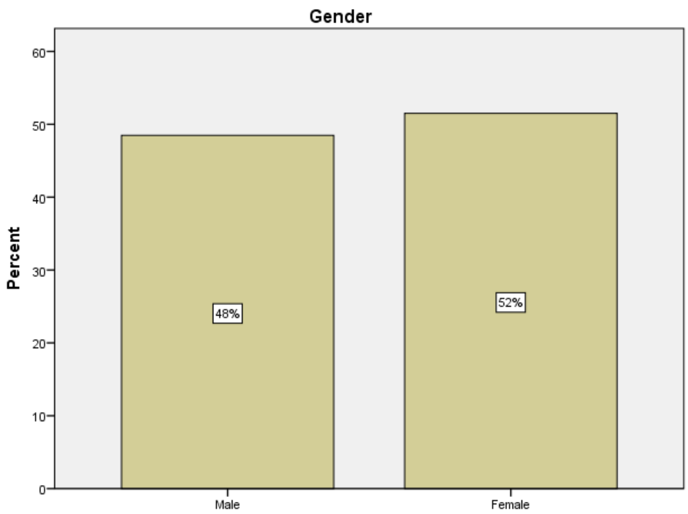


**Figure 3: Marital status**

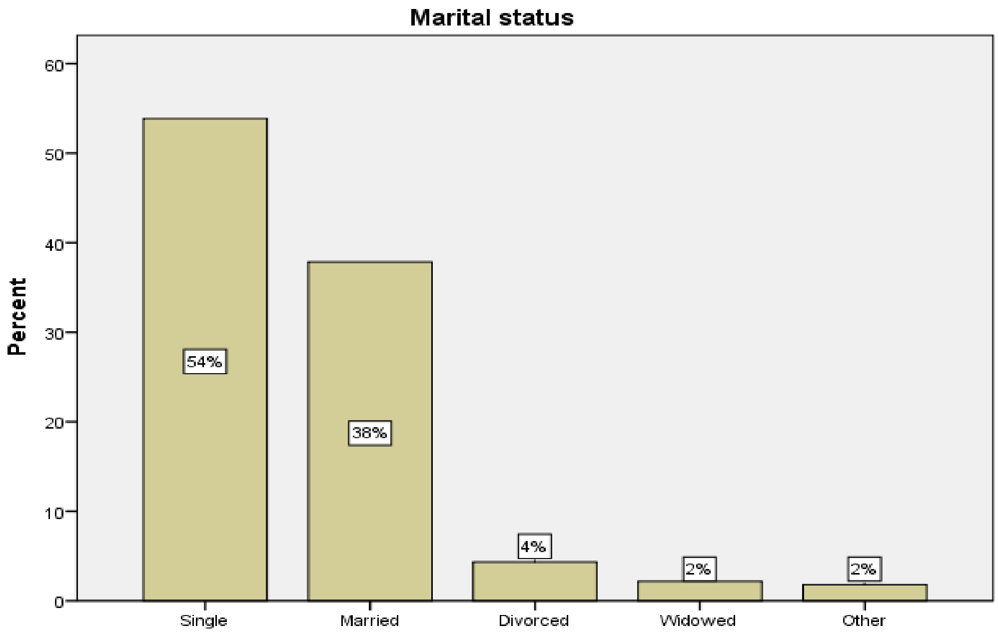
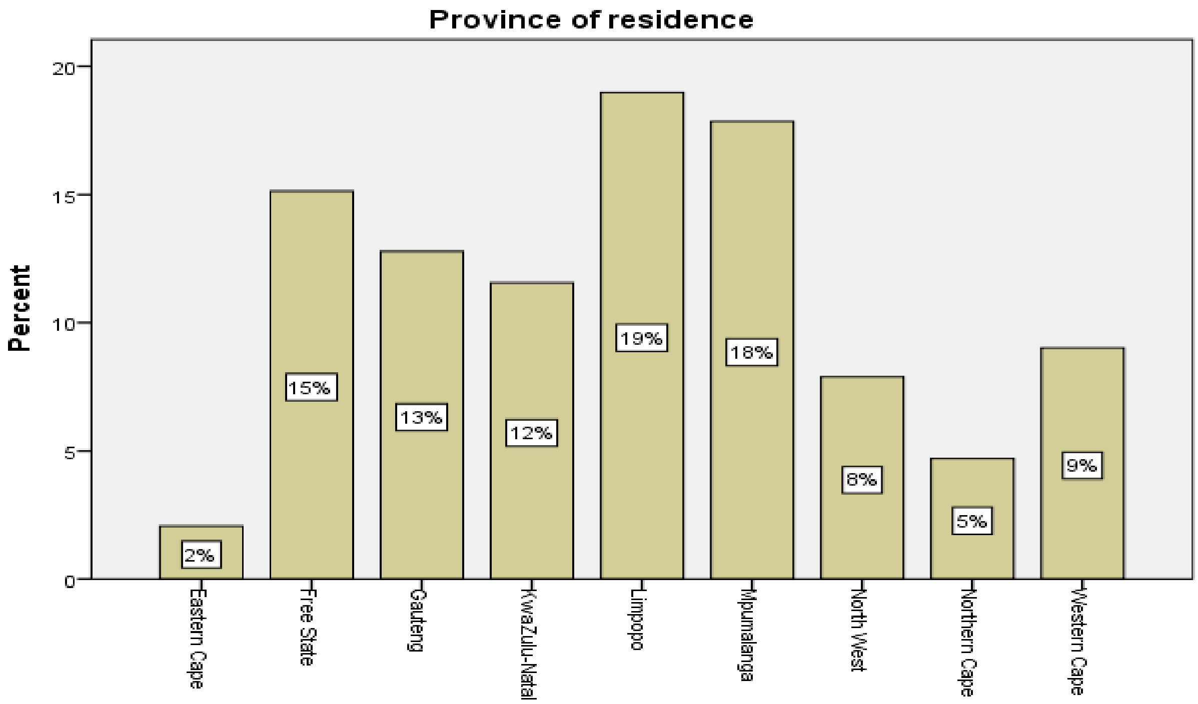
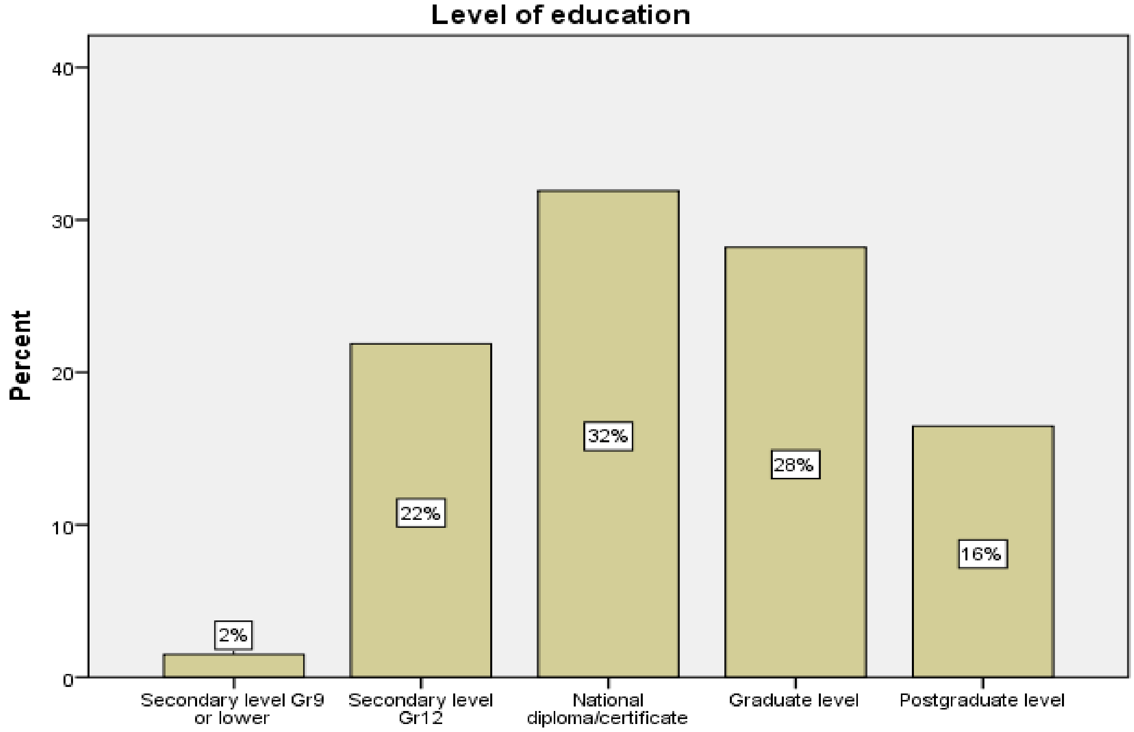


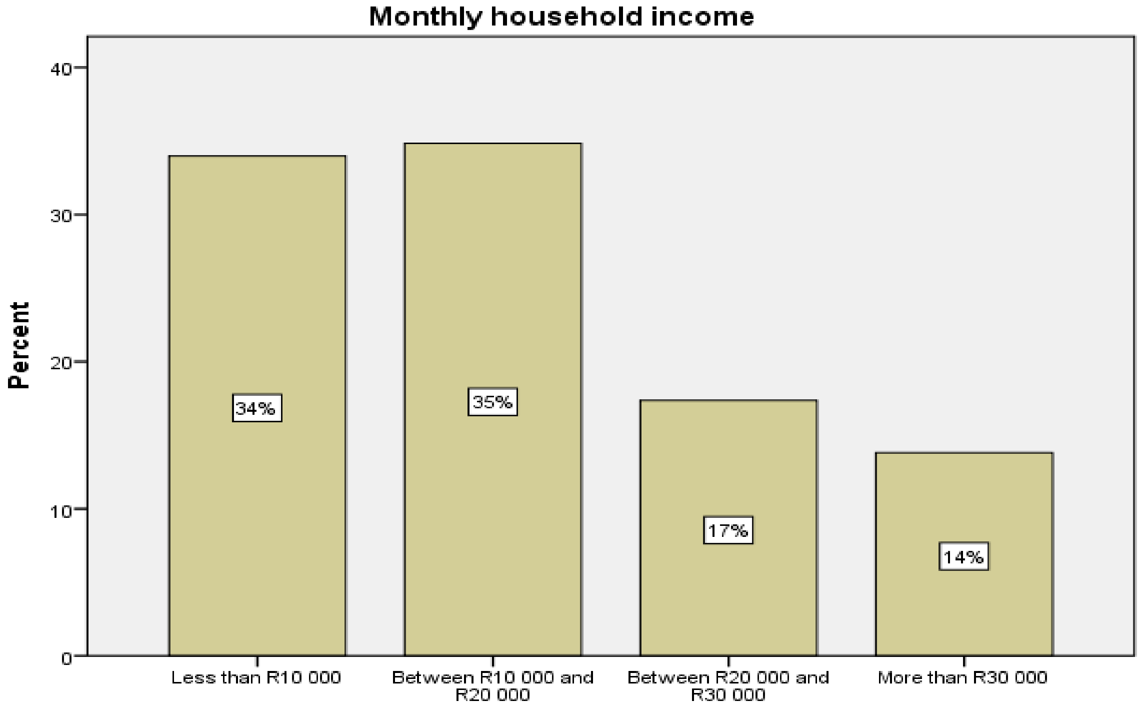

**Figure 4: Province of residence**



## 5. Level of education




## Figure 6: Monthly household income



## 8.2 Travel behaviour

A number of questions related to why and how respondents travelled.

**Figure 7: Travel for leisure purposes**

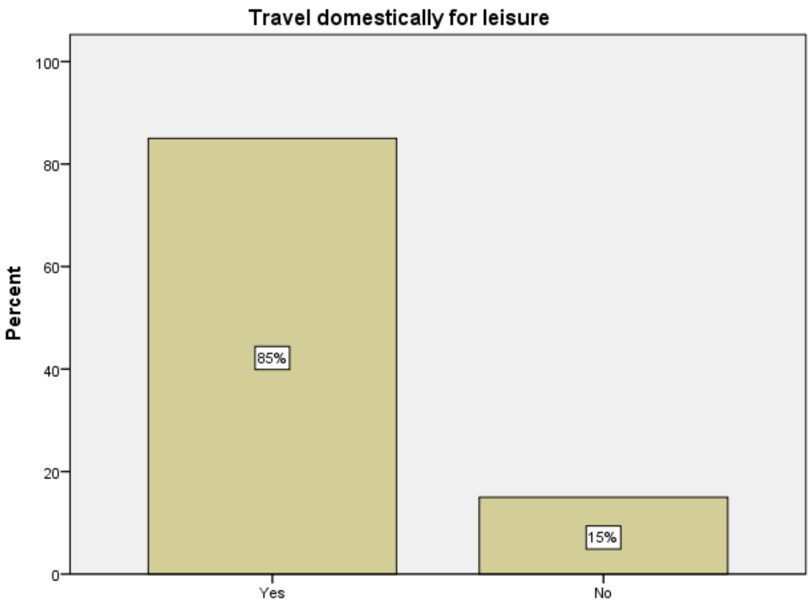
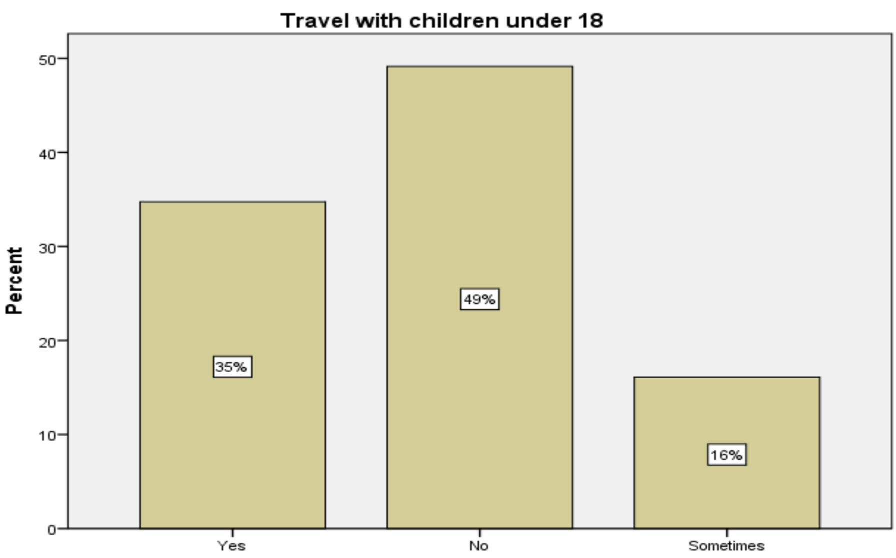



**Figure 8: Travel with children under 18**



Only a very small number of the respondents who were interviewed during a domestic trip indicated that it was their first leisure trip, with the majority having undertaken their first leisure trip more than 10 years ago and being motivated by curiosity and the desire the experience new things (figure2 9 - 10).

**Figure 9: First leisure trip**

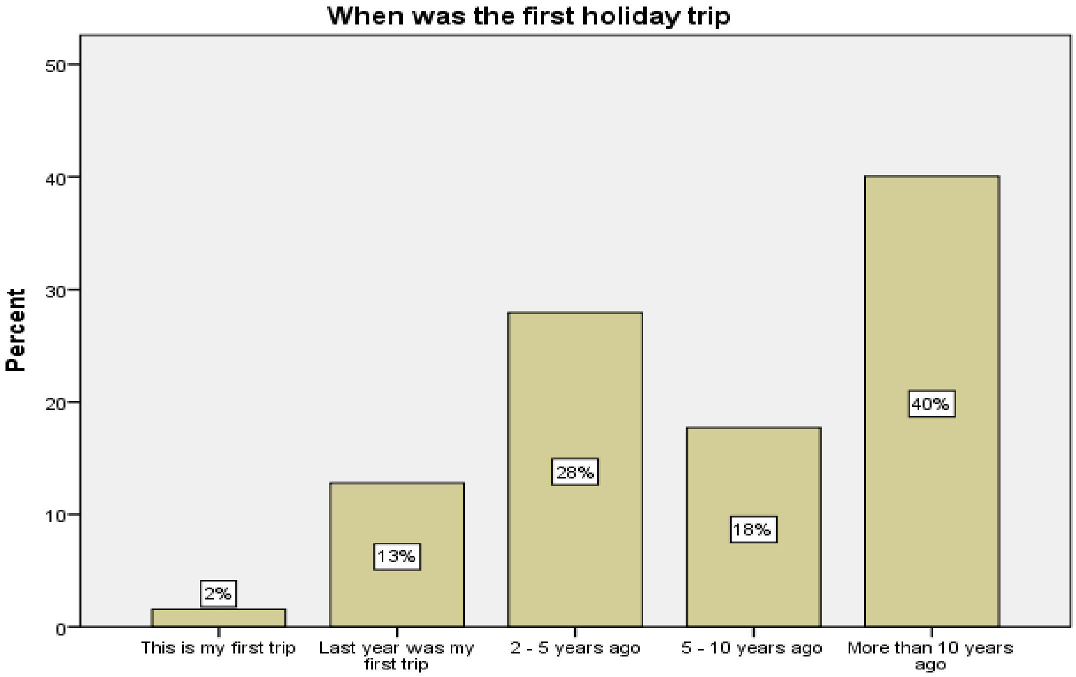
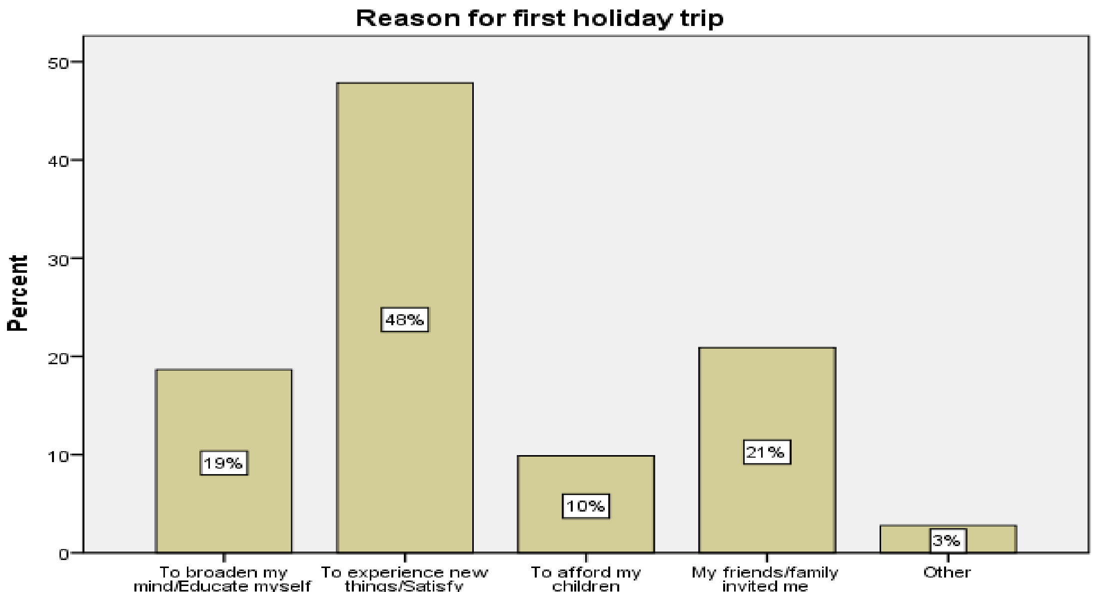



**Figure 10: Reason for first holiday trip**



Majority travel once a year, with family, in groups of 3 to 5 people and have been to 3 to 5 different holiday destinations.

**Figure 11: Frequency of travel**

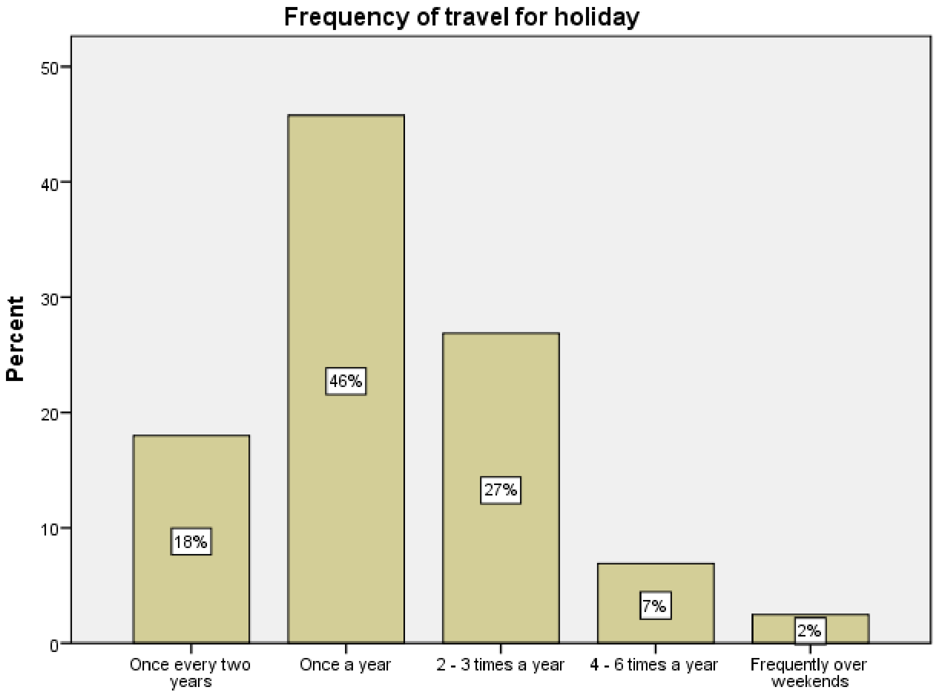



**Figure 12: Travel in company of**

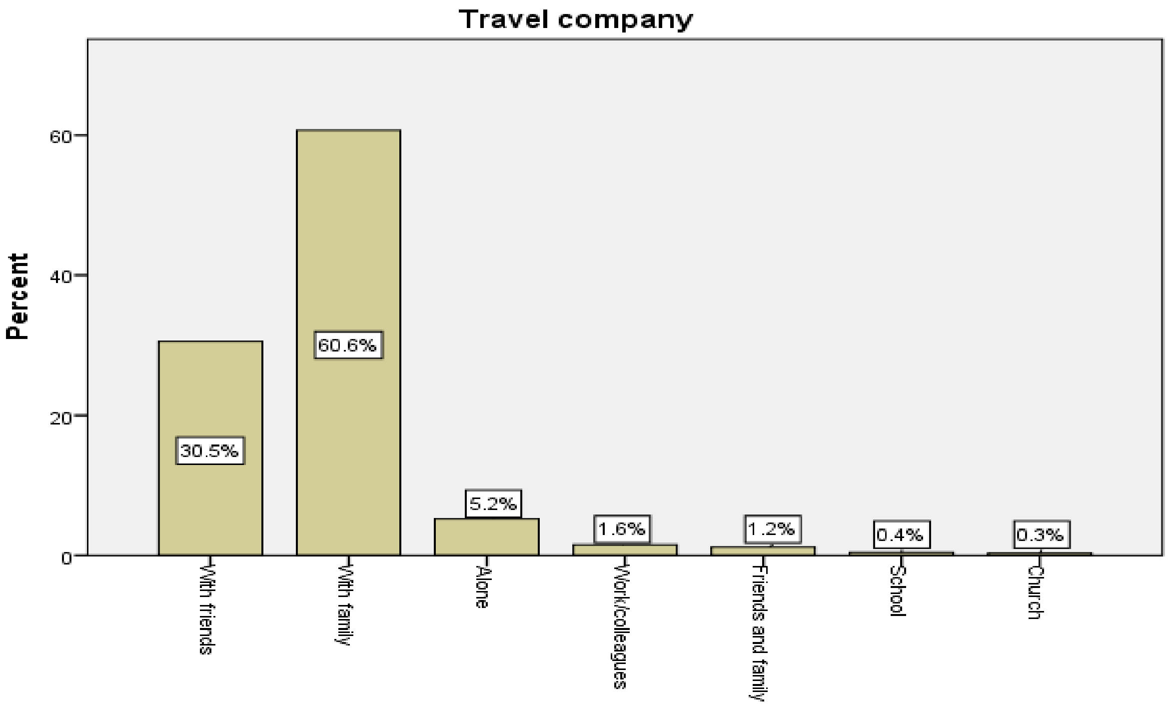


**Figure 13: Group size**

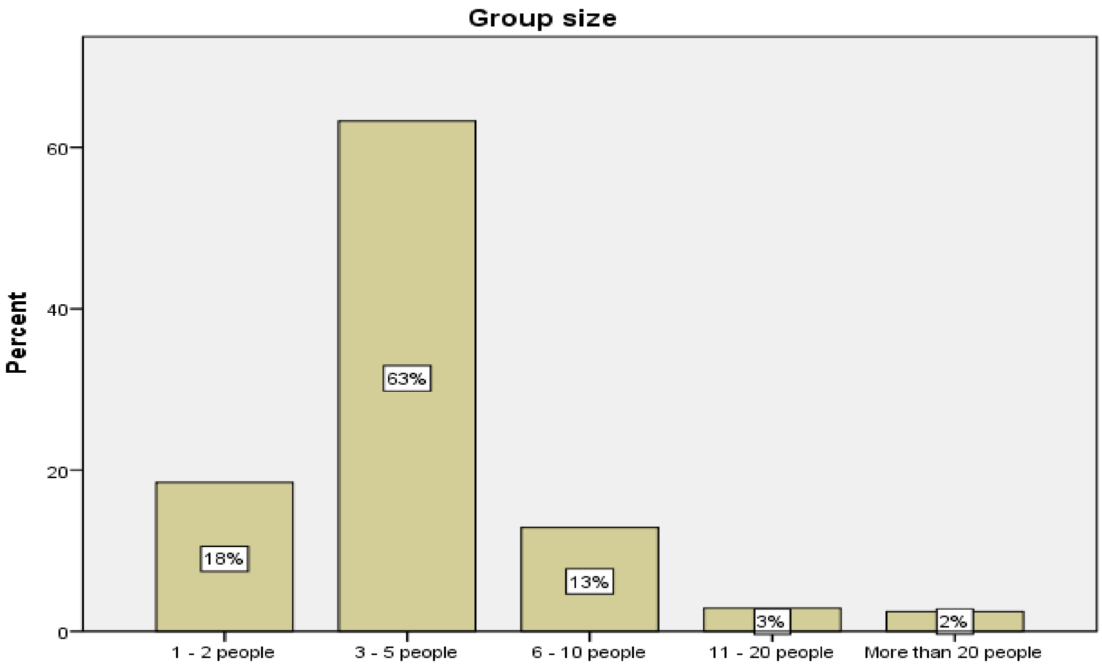
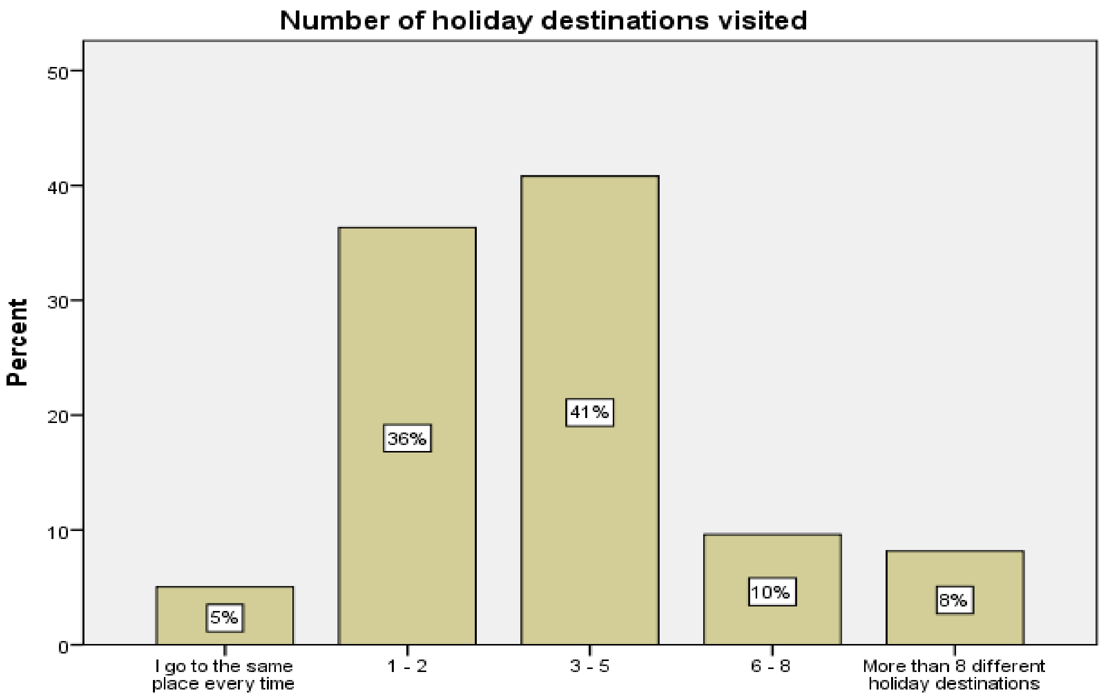



**Figure 14: Number of holiday destinations visited**



The average length of stay is 5 nights, with a minimum of 1 and maximum of 31. The most popular months and durations for leisure trips are indicated in Table 2 below.

**Table 2: Popular months and durations**

| Month | No. of days | Frequency | % |
|---|---|---|---|
| December | 3 - 7 nights | 408 | 38.3 |
| December | more than 7 | 142 | 13.3 |
| December | 1 - 2 nights | 136 | 12.8 |
| September | 3 - 7 nights | 131 | 12.3 |
| January | 3 - 7 nights | 100 | 9.4 |
| April | 3 - 7 nights | 94 | 8.8 |
| September | 1 - 2 nights | 88 | 8.3 |
| June | 3 - 7 nights | 85 | 8.0 |
| April | 1 - 2 nights | 59 | 5.5 |
| June | 1 - 2 nights | 53 | 5.0 |
| March | 3 - 7 nights | 53 | 5.0 |
| October | 3 - 7 nights | 50 | 4.7 |
| January | 1 - 2 nights | 46 | 4.3 |
| November | 3 - 7 nights | 45 | 4.2 |
| June | more than 7 | 39 | 3.7 |
| July | 3 - 7 nights | 38 | 3.6 |
| October | 1 - 2 nights | 34 | 3.2 |
| November | 1 - 2 nights | 34 | 3.2 |
| May | 3 - 7 nights | 33 | 3.1 |
| March | 1 - 2 nights | 32 | 3.0 |
| July | 1 - 2 nights | 30 | 2.8 |
| February | 3 - 7 nights | 30 | 2.8 |
| August | 3 - 7 nights | 30 | 2.8 |
| February | 1 - 2 nights | 26 | 2.4 |
| May | 1 - 2 nights | 26 | 2.4 |
| August | 1 - 2 nights | 25 | 2.3 |
| July | more than 7 | 18 | 1.7 |
| January | more than 7 | 17 | 1.6 |
| September | more than 7 | 17 | 1.6 |
| April | more than 7 | 13 | 1.2 |
| May | more than 7 | 8 | .8 |
| November | more than 7 | 8 | .8 |
| October | more than 7 | 7 | .7 |
| March | more than 7 | 6 | .6 |
| August | more than 7 | 6 | .6 |
| February | more than 7 | 5 | .5 |

Majority make holiday arrangements independently and book directly with suppliers via their websites (Figures 15 – 16). Recommendations by friends and family stirred the first interest in taking a leisure trip (Table 3). The most popular form of transport used is private vehicles (Table 4).

**Figure 15: Method of arranging holiday**

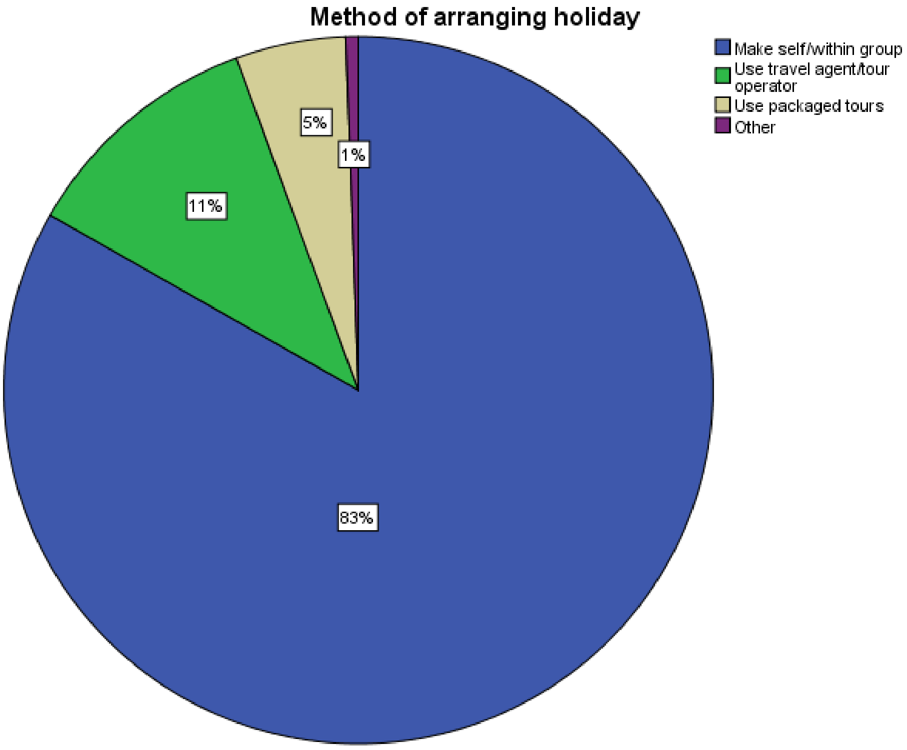



**Figure 16: Method of booking holiday**

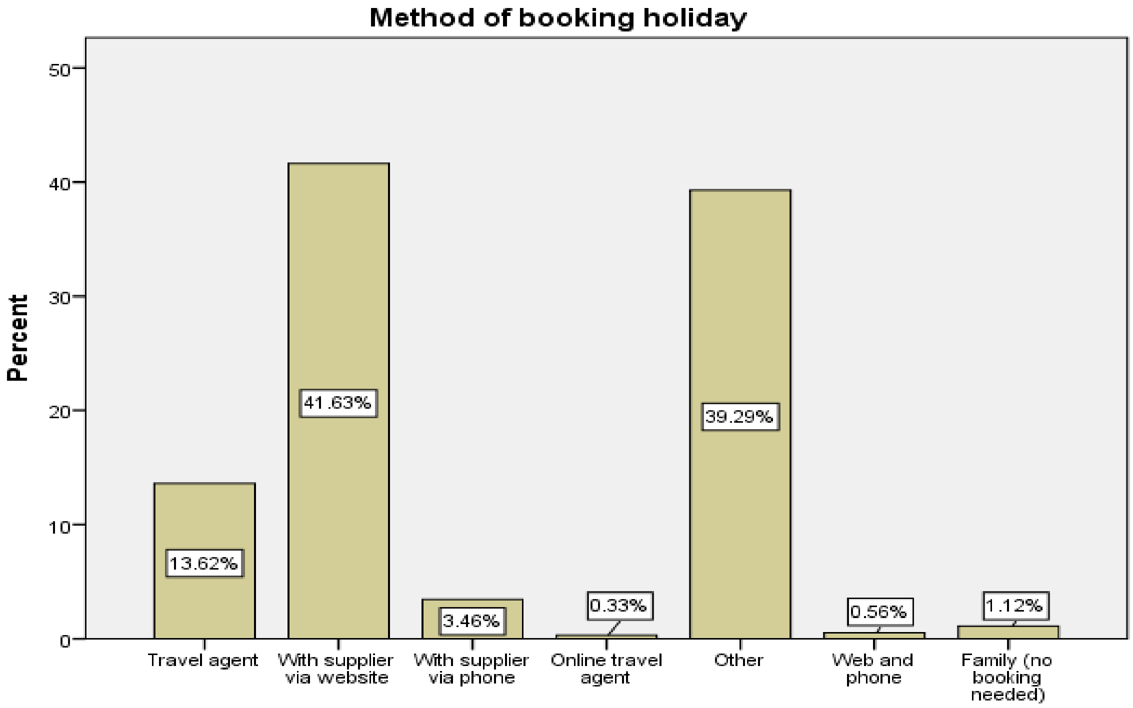


**Table 3: Sources of interest for first leisure trip**

| Source of interest to travel | Frequency | % |
|---|---|---|
| Recommendation by friends/family | 462 | 43.4 |
| Saw an advertisement | 127 | 11.9 |
| Social media posts | 90 | 8.5 |
| Read an article | 77 | 7.2 |
| Attended an event closeby | 72 | 6.8 |
| Other | 39 | 3.7 |
| Revisiting a place from the past | 39 | 3.7 |

**Table 4: Transport used for leisure trips**

| Mode of transport | Frequency | % |
|---|---|---|
| Private vehicle | 474 | 44.5 |
| Bus/coach | 172 | 16.2 |
| Airplane | 146 | 13.7 |
| Rental vehicle | 110 | 10.3 |
| Minibus taxi | 63 | 5.9 |
| Taxi services | 51 | 4.8 |
| Train | 15 | 1.4 |
| Other | 7 | .7 |

Majority of the respondents who indicated not having travelled in South Africa yet, gave a lack of finances as the main reason (Figure 17). Most respondents felt that travel was available to all South Africans (several of the respondents indicating ‘other’ also gave explanations supporting this statement) (Figure 18).

**Figure 17: Reasons for not travelling**

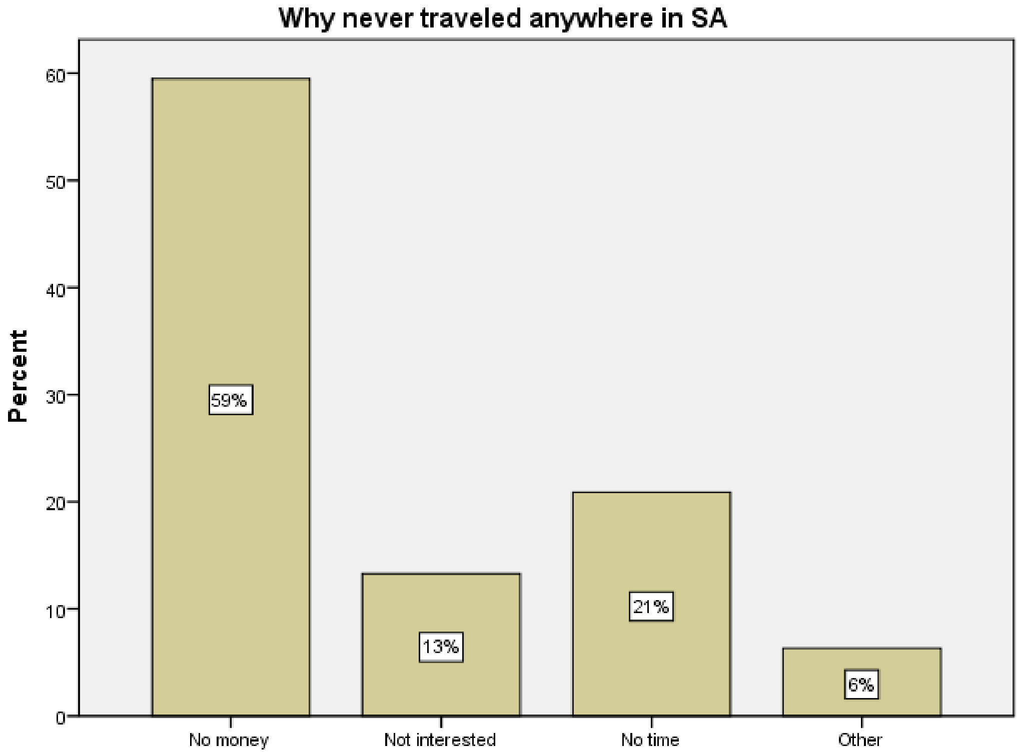
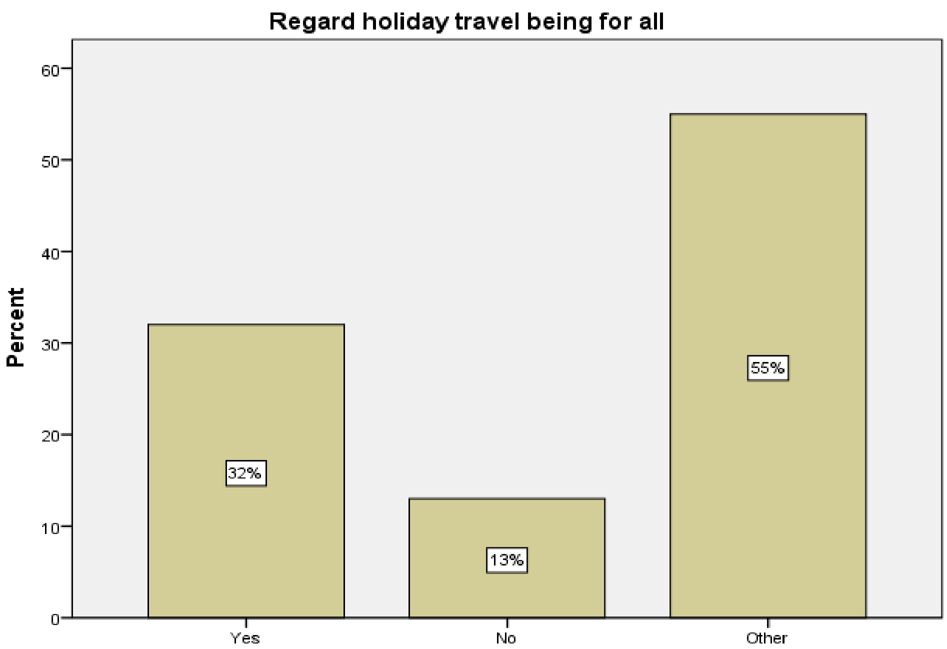



**Figure 18: Is holiday travel for all South Africans?**



## 8.3 Factors of importance when choosing any holiday destination

Respondents had to indicate the level of importance of various factors when choosing any holiday destination, on a scale from 1 to 10 where 1 = completely unimportant and 10 = extremely important. Table 6 indicates the mean scores achieved by the various factors place in descending order. Across all of the factors, the standard deviations were very high (>1), indicating low levels of agreement among respondents. Also consider response bias where respondents participating in surveys tend to identify the positive ends of a scale and give ratings accordingly. Also acquiescent bias (when the respondent turns over into an 'automated' mode and agrees to all the positive statements) and extreme response bias (where the respondent chooses the most extreme rating and provides it to many or all of the scale items (Smith, 2004).

**Table 6: Relative importance of factors**

| Factor | N | Mean | Std. Deviation |
|---|---|---|---|
| **MI Water** | **1013** | **9.06** | **1.603** |
| **QA Safety and security** | **1012** | **9.02** | **1.631** |
| **MI Electricity** | **1021** | **8.98** | **1.661** |
| **QA Service quality** | **1015** | **8.92** | **1.615** |
| **GM Clean/hygienic environment** | **1026** | **8.91** | **1.692** |
| **QA Healthcare services** | **1004** | **8.85** | **1.752** |
| **QA Value for money/affordability** | **1012** | **8.77** | **1.766** |
| **MI Signage** | **1019** | **8.71** | **1.780** |
| **MI Transport infrastructure** | **1017** | **8.66** | **1.816** |
| **GM Upgrade of general infrastructure** | **1035** | **8.64** | **1.742** |
| GM Upkeep attractions facilities | 1034 | 8.62 | 1.785 |
| PO Product variety | 1012 | 8.59 | 1.756 |
| GM Maintenance around tourist attractions | 1034 | 8.53 | 1.743 |
| PO Entertainment | 1022 | 8.51 | 1.915 |
| MKT Information on offering | 1022 | 8.50 | 1.825 |
| OE Attitude of local toward tourists | 1029 | 8.47 | 1.926 |
| OE Family friendly environment | 1014 | 8.43 | 2.144 |
| MI Internet | 1007 | 8.43 | 2.054 |
| MI Public transport | 1013 | 8.37 | 2.060 |
| PO Unique feature | 1027 | 8.35 | 1.965 |
| MI Alternative routes | 1021 | 8.27 | 2.075 |
| MKT Tourism brand and image | 1018 | 8.18 | 1.980 |
| OE Authentic products/services | 1028 | 8.16 | 2.031 |

| | | | |
|---|---|---|---|
| PO Beaches | 1011 | 8.16 | 2.261 |
| MI Car rental service | 1019 | 8.13 | 2.204 |
| PO Climate | 1009 | 8.12 | 2.121 |
| OE Cultural sensitive businesses | 1021 | 8.11 | 2.120 |
| MKT Marketing campaign for domestics | 1019 | 8.11 | 2.017 |
| MI Facilities for disabled | 1000 | 8.08 | 2.420 |
| PO Adventure activities | 1018 | 8.06 | 2.194 |
| OTH Environmental responsibility | 1020 | 8.01 | 2.116 |
| MI Distance traveled | 1010 | 8.00 | 2.193 |
| OTH Transformation | 1017 | 7.96 | 2.216 |
| PO Nature reserves/national parks | 1019 | 7.89 | 2.250 |
| PO World Heritage Sites | 995 | 7.78 | 2.299 |
| PO Recent history | 1023 | 7.71 | 2.365 |
| PO Wildlife | 993 | 7.64 | 2.457 |
| MKT Packaged tours | 1018 | 7.60 | 2.458 |

**Notes:**
MI – Mobility and infrastructure
QA – Quality assessment
GM – General maintenance
PO – Product offering
MKT – Marketing
OTH – Other
OE – Overall experience

Table 6 indicates that factors related to Mobility and Infrastructure, Quality Assessment and General Maintenance formed the list of top 10 most important factors. To test whether there were any statistically significant differences in the importance of the factors between individuals that have and have not travelled domestically for leisure purposes, t-tests and the non-parametric alternative, Mann-Whitney U test, were used interchangeably (normality tested at the hand of skewness and kurtosis). Table 5 indicates the factors that proved to be rated significantly different between the two groups of respondents.

**Table 5: Factors with significantly different levels of importance**

| Factor | test |
|---|---|
| MI Alternative routes | -2.659* |
| MI Public transport | -4.397* |
| MI Car rental services | -3.076* |
| MI Internet available | -2.694* |
| MI Facilities for disabled | -3.106* |
| QA Safety and security | -2.544* |
| QA Healthcare services | -2.214* |

* Significant at the 95% confidence level

To test the dimensionality of the scale, Exploratory Factors Analysis was used. The Kaiser-Mayer-Olkin Measure of Sampling Adequacy (.961) and Bartlett's Test of Sphericity ($p<.00$) indicated suitability of the data for this analysis. It was decided to accept factors loadings of 0.30 as acceptable (after Costello & Osborne, 2005 and Floyd & Widaman, 1995). Items were retained under the factor where they had the highest loading.

An initial unrestricted EFA delivered six factors with Eigenvalues >1, which explained 62% of the total variance. In comparison a second EFA restricted to six factors (with Eigenvalues >1) delivered a solution that explained 64% of the total variance. It was decided to proceed with the latter. Table 7 displays the rotated pattern matrix with factors.

**Table 7: Rotated component matrix**

| | Component | | | | | |
|---|---|---|---|---|---|---|
| | 1 | 2 | 3 | 4 | 5 | 6 |
| QA Safety and security | **.830** | | | | | |
| QA Healthcare services | **.802** | | | | | |
| MI Water | **.798** | | | | | |
| QA Service quality | **.789** | | | | | |
| MI Electricity | **.726** | | | .301 | | |
| QA Value for money/affordability | **.680** | | | | | |
| GM Clean/hygienic environment | **.675** | | | | .420 | |
| MI Signage | **.586** | | | .350 | | |
| MI Transport infrastructure | **.567** | .342 | | .350 | | |
| OE Attitude of local toward tourists | **.446** | | | | .360 | |
| MI Internet | **.428** | | | .396 | | |
| MKT Marketing campaign for domestics | | **.741** | | | | |
| OTH Environmental responsibility | | **.733** | | | | .315 |
| OTH Transformation | | **.720** | | | | |
| MKT Tourism brand and image | | **.692** | | | | |
| MKT Information on offering | .417 | **.649** | | | | |
| MKT Packaged tours | | **.619** | .362 | | | |
| PO Nature reserves/national parks | | | **.822** | | | |
| PO Wildlife | | | **.812** | | | |
| PO World Heritage Sites | | .390 | **.649** | | | |
| PO Recent history | | .461 | **.555** | | | |
| PO Unique feature | | | **.515** | | .358 | |
| PO Climate | | | **.436** | .316 | | |
| PO Beaches | | | | **.674** | | |
| PO Adventure activities | | | **.422** | **.599** | | |
| PO Entertainment | .381 | | | **.592** | | |
| MI Public transport | .361 | | | **.508** | | .310 |

| | | | | | | |
|---|---|---|---|---|---|---|
| MI Car rental service | | .335 | .303 | **.421** | | |
| MI Alternative routes | .316 | .323 | | **.414** | | .387 |
| GM Upgrade of general infrastructure | | | | | **.786** | |
| GM Maintenance around tourist attractions | .407 | | | | **.644** | |
| GM Upkeep attractions facilities | .509 | | | | **.628** | |
| PO Product variety | .368 | | .308 | .302 | **.469** | |
| OE Authentic products/services | | | | | **.398** | .321 |
| OE Family friendly environment | .327 | | .350 | | | **.617** |
| MI Facilities for disabled | | | | | | **.583** |
| OE Cultural sensitive businesses | | | | | .343 | **.542** |
| MI Distance traveled | | .360 | | .310 | .320 | **.472** |

Extraction Method: Principal Component Analysis.
Rotation Method: Varimax with Kaiser Normalization.[a]
a. Rotation converged in 8 iterations.

Table 8 displays the 6 factors with their new labels. The reliability of the factors was tested using Cronbach's Alpha. All of the factors achieved the desired level (Alpha > 0.70) and none of the items were deleted as deletion would not significantly increase the Alpha values.

**Table 8: New factors – The Tourism and Travel Market Indicators Index**

| Factor | Cronbach's Alpha |
|---|---|
| **New label: Quality and infrastructure**<br>- Value for money/affordability<br>- Clean/hygienic environment<br>- Attitude of local toward tourists<br>- Signage<br>- Transport infrastructure<br>- Electricity<br>- Water<br>- Service quality<br>- Safety and security<br>- Healthcare services<br>- Internet | .936 |
| **New label: Marketing and social responsibility**<br>- Tourism brand and image<br>- Information on offering<br>- Packaged tours<br>- Environmental responsibility<br>- Transformation | .897 |
| **New label: Primary product features**<br>- Unique feature<br>- Climate<br>- Wildlife<br>- Nature reserves/national parks<br>- World Heritage Sites<br>- Recent history | .859 |

| | |
|---|---|
| **New label: Secondary product features**<br>- Adventure activities<br>- Beaches<br>- Entertainment<br>- Alternative routes<br>- Public transport<br>- Car rental service | .795 |
| **New label: General maintenance and product character**<br>- Upgrade of general infrastructure<br>- Maintenance around tourist attractions<br>- Upkeep attractions facilities<br>- Authentic products/services<br>- Product variety | .831 |
| **New label: Overall experience and accessibility**<br>- Cultural sensitive businesses<br>- Family friendly environment<br>- Distance traveled<br>- Facilities for disabled | .763 |

### 8.4 Evaluation of the two case study provinces (KwaZulu-Natal and Northern Cape)

The final phase of the analysis encompassed an evaluation of the performance of two provinces based on the six factors using a 10-point scale where 1 = extremely unattractive and 10 = extremely attractive.

The first step in this process was to assign a ranked weighting to each of the factor items based on their relative importance as indicated in Table 5. Each item received a weighting based on its position of importance (i.e. 'water' received a weighting of 38 as there were 38 items in total; 'safety and security' received a weighting of 37; etc.).

The next step was to measure the performance of the provinces according to the mean scores achieved. Each item's mean score was then multiplied by the aforementioned weighting. The final step was to determine an overall score for each of the six individual factors. This was done by summating the individual item scores and calculating a final score out of the total possible score of the factor. Each factor had a different possible total score as each factor consisted of a different number of items, each with its own possible ranked weighting score. The achieved score was divided by the possible score to calculate a percentage. This percentage was finally converted to a score out of 10 to remain uniform with the 10-point measurement scale used. This analysis was split between visitors that have been to the two provinces before and those that have not, to determine the difference in scores based on perceptions versus experiences.

Before undertaking this scoring based on ranked weightings, the reliability of the scale is first tested within each case study context, as well as testing whether there are any statistically significant differences in the ratings given by past and potential visitors to the two provinces.

**NORTHERN CAPE**

The reliability of the scale was tested with Cronbach's Alpha. Table 9 indicates the Alpha scores of achieved by the factors for both respondents that have and have not visited the province before. The scores are all well above the required level (Alpha =.70), indicating the reliability of the scale when used in either the context of measuring perceptions (have not visited before) versus experiences (have visited before).

**Table 9: Scale reliability – Northern Cape**

| Factor | Cronbach's Alpha | |
|---|---|---|
| | Have visited before | Have not visited |
| Quality and infrastructure | .928 (N=380) | .963 (N=433) |
| Marketing and social responsibility | .869 (N=409) | .917 (N=447) |
| Primary product features | .821 (N=418) | .903 (N=455) |
| Secondary product features | .810 (N=408) | .914 (N=445) |
| General maintenance and product character | .870 (N=429) | .914 (N=485) |
| Overall experience and accessibility | .812 (N=422) | .890 (N=474) |

Table 10 indicates the evaluation of the performance of the Northern Cape in terms of the various items, indicating the difference in scores for visitors that have and have not visited the Northern Cape before. The difference on the following items proved to be statistically significant(*):

- upgrade of general infrastructure (t=2.355; p=.02)
- unique feature (t=4.424; p=.00)
- electricity (t=2.742; p=.00)

- public transport (t=2.749; p=.00)
- service quality (t=2.264; p=.02)
- transformation (t=-2.027; p=.04)

For strategy development it would be important to consider such differences given that, for example, three of these (electricity, service quality and upgrade of general infrastructure) fall within the top 10 most important factors as indicated in Table 5 and implies that perceptions need to be managed to attract potential domestic tourists.

**Table 10: Mean scores of evaluation – Northern Cape**

| | Visited NC before | N | Mean | Std. Deviation |
|---|---|---|---|---|
| C1 Clean/hygienic environment | Yes | 432 | 7.50 | 1.965 |
| | No | 492 | 7.31 | 2.209 |
| C1 Attitude of local toward tourists | Yes | 440 | 7.42 | 1.949 |
| | No | 498 | 7.16 | 2.313 |
| C1 Signage | Yes | 438 | 7.45 | 2.041 |
| | No | 488 | 7.17 | 2.287 |
| C1 Transport infrastructure | Yes | 440 | 7.24 | 2.247 |
| | No | 489 | 7.03 | 2.306 |
| C1 Electricity* | Yes | 434 | 8.15 | 1.920 |
| | No | 484 | 7.76 | 2.328 |
| C1 Water | Yes | 436 | 7.63 | 2.058 |
| | No | 488 | 7.35 | 2.248 |
| C1 Internet | Yes | 427 | 7.21 | 2.108 |
| | No | 482 | 7.24 | 2.387 |
| C1 Service quality* | Yes | 433 | 7.74 | 1.981 |
| | No | 482 | 7.42 | 2.289 |
| C1 Safety and security | Yes | 430 | 7.72 | 1.894 |
| | No | 480 | 7.54 | 2.234 |
| C1 Healthcare services | Yes | 430 | 7.51 | 2.055 |
| | No | 484 | 7.31 | 2.280 |
| C1 Value for money/affordability | Yes | 435 | 6.99 | 2.170 |
| | No | 490 | 6.85 | 2.432 |
| C2 Tourism brand and image | Yes | 434 | 7.06 | 2.106 |
| | No | 486 | 6.95 | 2.426 |
| C2 Information on offering | Yes | 436 | 6.76 | 2.238 |
| | No | 489 | 6.76 | 2.473 |
| C2 Marketing campaign for domestics | Yes | 430 | 6.70 | 2.257 |
| | No | 484 | 6.63 | 2.485 |
| C2 Packaged tours | Yes | 437 | 7.00 | 2.060 |
| | No | 491 | 6.95 | 2.383 |
| C2 Environmental responsibility | Yes | 435 | 6.85 | 2.298 |

| | | | | |
|---|---|---|---|---|
| | No | 491 | 6.83 | 2.531 |
| C2 Transformation* | Yes | 426 | 5.19 | 3.043 |
| | No | 461 | 5.61 | 3.012 |
| C3 Unique feature* | Yes | 440 | 8.05 | 2.001 |
| | No | 493 | 7.44 | 2.238 |
| C3 Climate | Yes | 436 | 7.01 | 2.263 |
| | No | 487 | 6.72 | 2.452 |
| C3 Wildlife | Yes | 438 | 6.74 | 2.321 |
| | No | 480 | 6.81 | 2.423 |
| C3 Nature reserves/national parks | Yes | 437 | 7.02 | 2.238 |
| | No | 489 | 6.95 | 2.368 |
| C3 World Heritage Sites | Yes | 438 | 6.85 | 2.260 |
| | No | 491 | 6.87 | 2.397 |
| C3 Recent history | Yes | 438 | 7.11 | 2.191 |
| | No | 485 | 7.00 | 2.267 |
| C4 Public transport* | Yes | 439 | 7.46 | 2.130 |
| | No | 488 | 7.07 | 2.244 |
| C4 Car rental service | Yes | 438 | 7.01 | 2.293 |
| | No | 480 | 6.97 | 2.409 |
| C4 Alternative routes | Yes | 433 | 8.09 | 1.929 |
| | No | 488 | 7.85 | 2.180 |
| C4 Adventure activities | Yes | 438 | 6.87 | 2.244 |
| | No | 489 | 6.97 | 2.378 |
| C4 Beaches | Yes | 423 | 6.74 | 2.363 |
| | No | 473 | 6.82 | 2.496 |
| C4 Entertainment | Yes | 439 | 7.42 | 2.102 |
| | No | 489 | 7.28 | 2.279 |
| C5 Authentic products/services | Yes | 438 | 7.32 | 1.921 |
| | No | 494 | 7.11 | 2.219 |
| C5 Product variety | Yes | 436 | 7.25 | 2.098 |
| | No | 493 | 7.01 | 2.359 |
| C5 Upgrade of general infrastructure* | Yes | 443 | 7.50 | 2.035 |
| | No | 499 | 7.17 | 2.247 |
| C5 Maintenance around tourist attractions | Yes | 441 | 7.31 | 1.978 |
| | No | 500 | 7.13 | 2.084 |
| C5 Upkeep attractions facilities | Yes | 437 | 7.38 | 1.938 |
| | No | 495 | 7.18 | 2.144 |
| C6 Family friendly environment | Yes | 436 | 7.54 | 2.001 |
| | No | 493 | 7.33 | 2.230 |
| C6 Distance traveled | Yes | 431 | 7.39 | 2.261 |
| | No | 482 | 7.31 | 2.287 |
| C6 Facilities for disabled | Yes | 437 | 7.61 | 1.886 |
| | No | 486 | 7.51 | 2.234 |
| C6 Cultural sensitive businesses | Yes | 439 | 7.17 | 1.978 |
| | No | 496 | 7.07 | 2.264 |

**KWAZULU-NATAL**

The reliability of the scale was again tested with Cronbach's Alpha. Table 11 indicates the Alpha scores of achieved by the factors for both respondents that have and have not visited the province before. The scores are again all well above the required level (Alpha =.70), again confirming the reliability of the scale when used in either the context of measuring perceptions (have not visited before) versus experiences (have visited before).

**Table 11: Scale reliability – KwaZulu-Natal**

| Factor | Cronbach's Alpha | |
|---|---|---|
| | Have visited before | Have not visited |
| Quality and infrastructure | .947 (N=591) | .947 (N=258) |
| Marketing and social responsibility | .921 (N=628) | .897 (N=288) |
| Primary product features | .869 (N=599) | .873 (N=273) |
| Secondary product features | .879 (N=618) | .860 (N=285) |
| General maintenance and product character | .886 (N=626) | .895 (N=289) |
| Overall experience and accessibility | .789 (N=616) | .848 (N=279) |

Table 12 indicates the evaluation of the performance of KwaZulu-Natal in terms of the various items, indicating the difference in scores for visitors that have and have not visited KwaZulu-Natal before. The difference on the following items proved to be statistically significant(*):

- attitude of locals toward tourists (t=2.016; p=.04)
- value for money (t=2.298; p=.02)
-packaged tours (t=2.068; p=.04)
- climate (t=2.453; p=.02)
- adventure activities (t=2.265; p=.02)
- beaches (t=-2.679; p=.00)
- entertainment (t=2.507; p=.01)
- upgrade of general infrastructure (t=3.537; p=.00)
- maintenance around tourist attractions (t=2.102; p=.04)
- facilities for disabled (t=2.176; p=.03)

It is interesting to note the shift in focus between the previous province which is not visited as frequently by domestic leisure tourists (differences pertain more to 'quality and infrastructure') and this popular domestic destination (many of the differences pertain to specific features of the product offering).

**Table 12: Mean scores of evaluation – KwaZulu-Natal**

| | Visited KZN before | N | Mean | Std. Deviation |
|---|---|---|---|---|
| C1 Clean/hygienic environment | Yes | 638 | 8.00 | 1.910 |
| | No | 294 | 7.71 | 2.228 |
| C1 Attitude of local toward tourists* | Yes | 643 | 8.05 | 1.890 |
| | No | 293 | 7.77 | 2.056 |
| C1 Signage | Yes | 637 | 8.30 | 1.769 |
| | No | 294 | 8.26 | 1.845 |
| C1 Transport infrastructure | Yes | 634 | 8.22 | 1.782 |
| | No | 291 | 8.19 | 1.839 |
| C1 Electricity | Yes | 636 | 8.58 | 1.743 |
| | No | 295 | 8.36 | 1.875 |
| C1 Water | Yes | 640 | 8.61 | 1.733 |
| | No | 287 | 8.37 | 1.978 |
| C1 Service quality | Yes | 636 | 8.25 | 1.779 |
| | No | 290 | 8.01 | 1.913 |
| C1 Safety and security | Yes | 635 | 7.98 | 1.940 |
| | No | 293 | 7.84 | 2.135 |
| C1 Healthcare services | Yes | 628 | 8.13 | 1.835 |
| | No | 288 | 8.06 | 1.957 |
| C1 Value for money/affordability* | Yes | 633 | 8.24 | 1.822 |
| | No | 289 | 7.93 | 1.962 |
| C1 Internet | Yes | 637 | 8.30 | 1.833 |
| | No | 290 | 8.14 | 1.862 |
| C2 Tourism brand and image | Yes | 641 | 8.22 | 1.818 |
| | No | 295 | 8.07 | 1.800 |
| C2 Information on offering | Yes | 639 | 8.24 | 1.770 |
| | No | 294 | 8.11 | 1.820 |
| C2 Marketing campaign for domestics | Yes | 640 | 8.13 | 1.858 |
| | No | 295 | 8.03 | 2.017 |
| C2 Packaged tours* | Yes | 636 | 7.78 | 2.062 |
| | No | 293 | 7.44 | 2.450 |
| C2 Environmental responsibility | Yes | 639 | 7.81 | 1.945 |
| | No | 293 | 7.65 | 2.139 |
| C2 Transformation | Yes | 637 | 7.80 | 1.943 |
| | No | 292 | 7.71 | 2.165 |
| C3 Unique feature | Yes | 644 | 8.22 | 1.890 |
| | No | 293 | 8.02 | 1.991 |
| C3 Climate* | Yes | 635 | 8.33 | 1.874 |
| | No | 289 | 7.97 | 2.155 |
| C3 Wildlife | Yes | 631 | 7.65 | 2.177 |
| | No | 284 | 7.53 | 2.297 |
| C3 Nature reserves/national parks | Yes | 643 | 7.82 | 2.003 |
| | No | 293 | 7.67 | 2.144 |
| C3 World Heritage Sites | Yes | 622 | 7.77 | 2.071 |
| | No | 289 | 7.79 | 2.197 |
| C3 Recent history | Yes | 643 | 7.72 | 2.052 |

| | | | | |
|---|---|---|---|---|
| | No | 295 | 7.69 | 2.150 |
| C4 Adventure activities* | Yes | 640 | 8.24 | 1.846 |
| | No | 295 | 7.92 | 2.097 |
| C4 Beaches* | Yes | 638 | 8.63 | 1.821 |
| | No | 294 | 8.23 | 2.235 |
| C4 Entertainment* | Yes | 636 | 8.55 | 1.741 |
| | No | 294 | 8.21 | 1.944 |
| C4 Alternative routes | Yes | 638 | 7.93 | 1.974 |
| | No | 295 | 7.71 | 2.247 |
| C4 Public transport | Yes | 637 | 8.27 | 1.884 |
| | No | 292 | 8.08 | 2.123 |
| C4 Car rental service | Yes | 639 | 8.25 | 1.908 |
| | No | 294 | 7.97 | 2.072 |
| C5 Upgrade of general infrastructure* | Yes | 643 | 8.51 | 1.553 |
| | No | 296 | 8.06 | 1.950 |
| C5 Maintenance around tourist attractions* | Yes | 644 | 8.27 | 1.719 |
| | No | 295 | 8.00 | 1.909 |
| C5 Upkeep attractions facilities | Yes | 642 | 8.23 | 1.809 |
| | No | 299 | 8.11 | 1.868 |
| C5 Authentic products/services | Yes | 640 | 8.13 | 1.856 |
| | No | 292 | 7.96 | 1.955 |
| C5 Product variety | Yes | 639 | 8.30 | 1.825 |
| | No | 293 | 8.11 | 1.973 |
| C6 Cultural sensitive businesses | Yes | 641 | 7.93 | 1.956 |
| | No | 295 | 7.71 | 2.104 |
| C6 Family friendly environment | Yes | 639 | 8.19 | 1.887 |
| | No | 294 | 8.04 | 1.950 |
| C6 Distance traveled | Yes | 637 | 7.76 | 2.093 |
| | No | 289 | 7.62 | 1.970 |
| C6 Facilities for disabled* | Yes | 628 | 8.04 | 1.903 |
| | No | 285 | 7.71 | 2.254 |

The final step in the analysis was calculation of the ranked weighted scores per factor and overall for each province, distinguishing between respondents that have and have not visited the two case study destinations. Table 13 presents the final scores per factor and the overall final scores achieved (refer to Appendix E for detail on the individual items and the data used to calculate each score).

**Table 13: Final performance evaluation of the two case study provinces**

| HAVE VISITED | | HAVE NOT VISITED | |
|---|---|---|---|
| NC w/score | KZN w/score | NC w/score | KZN w/score |
| *Quality and infrastructure* | | | |
| 7.5 | 8.2 | 7.3 | 8 |
| *Marketing and social responsibility* | | | |
| 6.7 | 8.1 | 6.7 | 8 |
| *Primary product features* | | | |
| 7.4 | 8.1 | 7.1 | 8 |
| *Secondary product features* | | | |
| 7.3 | 8.3 | 7.2 | 8 |
| *General maintenance and product character* | | | |
| 7.4 | 8.3 | 7.1 | 8.1 |
| *Overall experience and accessibility* | | | |
| 7.5 | 8 | 7.3 | 7.8 |
| *FINAL OVERALL SCORE* | | | |
| 7.4 | 8.2 | 7.2 | 8 |

The table indicates that Northern Cape achieved a score of 7.4 by people who have visited and 7.2 by people who have not yet visited the province. KwaZulu-Natal achieved a score of 8.2 by people who have visited and 8 by people who have not visited the province. In all instances the scores achieved for past visitors (experiences) were higher (one case equal) than for potential visitors. This indicates the importance of addressing perceptions amongst the domestic market. The table indicates that KwaZulu-Natal has a stronger record in terms of positive visitor experiences, as well as a positive record based on perceptions among potential tourists.

Figure 19 present a graphic depiction of Table 13 which provides a clearer view of how the two provinces compare in terms of the factors of competitiveness. This figure clearly shows that Kwazulu-Natal has a higher rating on all factors than what Northern Cape Province does on the Tourism and Travel Market Indicators Index, both for tourists who have visited the provinces and for tourists who have not yet visited the provinces.

**Figure 19: Northern Cape vs Kwazulu-Natal – Perceptions of tourists who have visited and who have not yet visited**

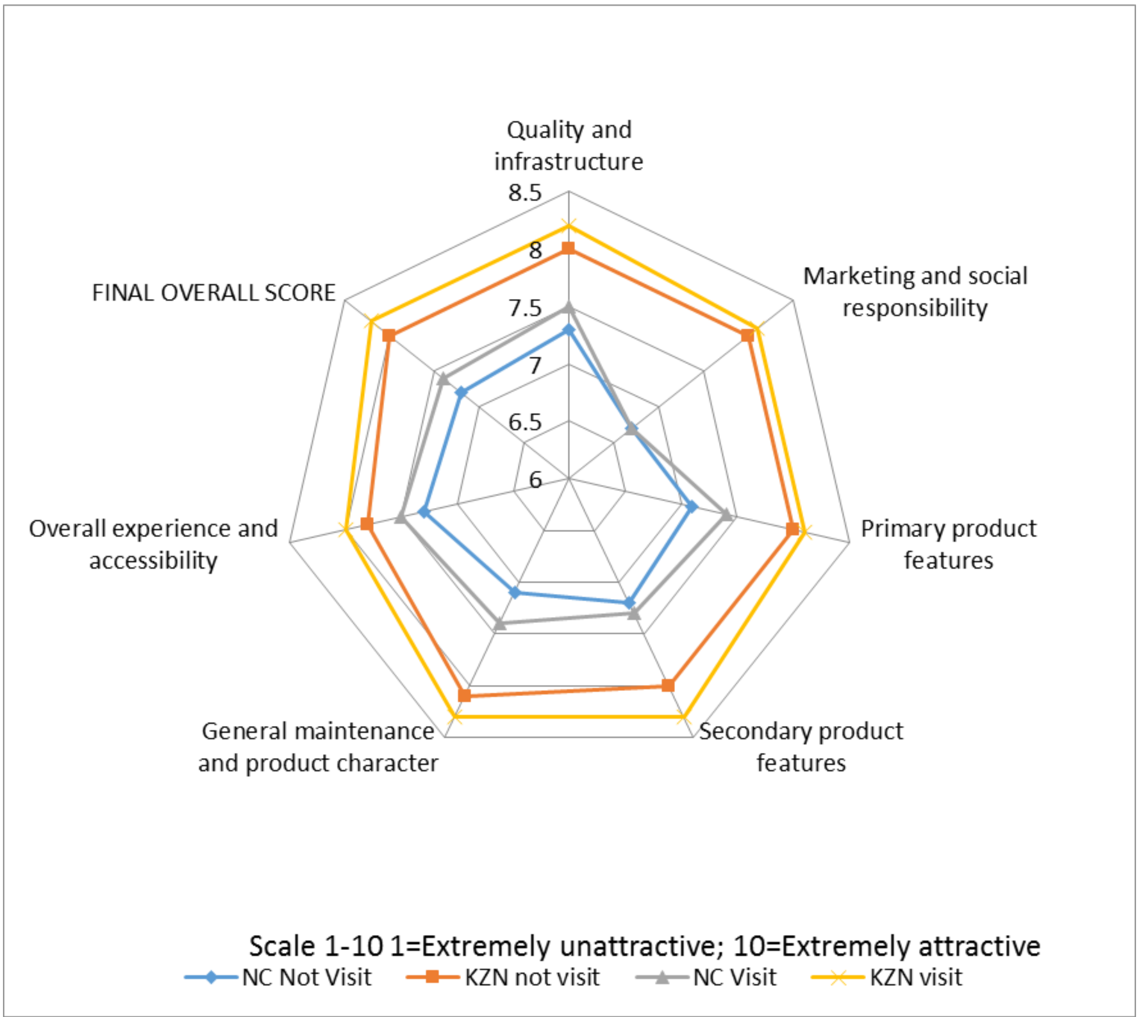



Figure 19 indicates that the Northern Cape achieved an overall score of 7.4 by people who have visited and 7.2 by people who have not yet visited the province. KwaZulu-Natal achieved a score of 8.2 by people who have visited and 8 by people who have not yet visited the province. In all instances the scores achieved for past visitors (experiences) were higher (one case equal) than for potential visitors. KwaZulu-Natal has a stronger record in terms of positive visitor experiences, as well as a positive record based on perceptions among potential tourists.

# 10. RECOMMENDATION FOR A PROVINCIAL TOURISM COMPETITIVENESS MODEL FOR SOUTH AFRICA

## 10.1. The proposed Provincial T&T Competitiveness Model

It was stated that the outcome of the empirical research process was to identify the factors and indicators that would measure the tourism competitiveness of a province against other provinces, in other words to develop a set of factors and indicators (referred to as the Tourism and Travel Market Indicators Index) to measure the demand and supply side of tourism in a province. Demand and supply factors were identified and tourists' perceptions of these factors were measured.

Clearly the two provinces that were compared are very different in a number of ways, for example geographic spread, population and economic activity with each also having their own challenges and unique environment within which they operate. Thus, some context must be provided against which the Tourism and Travel Market Indicators can be viewed.

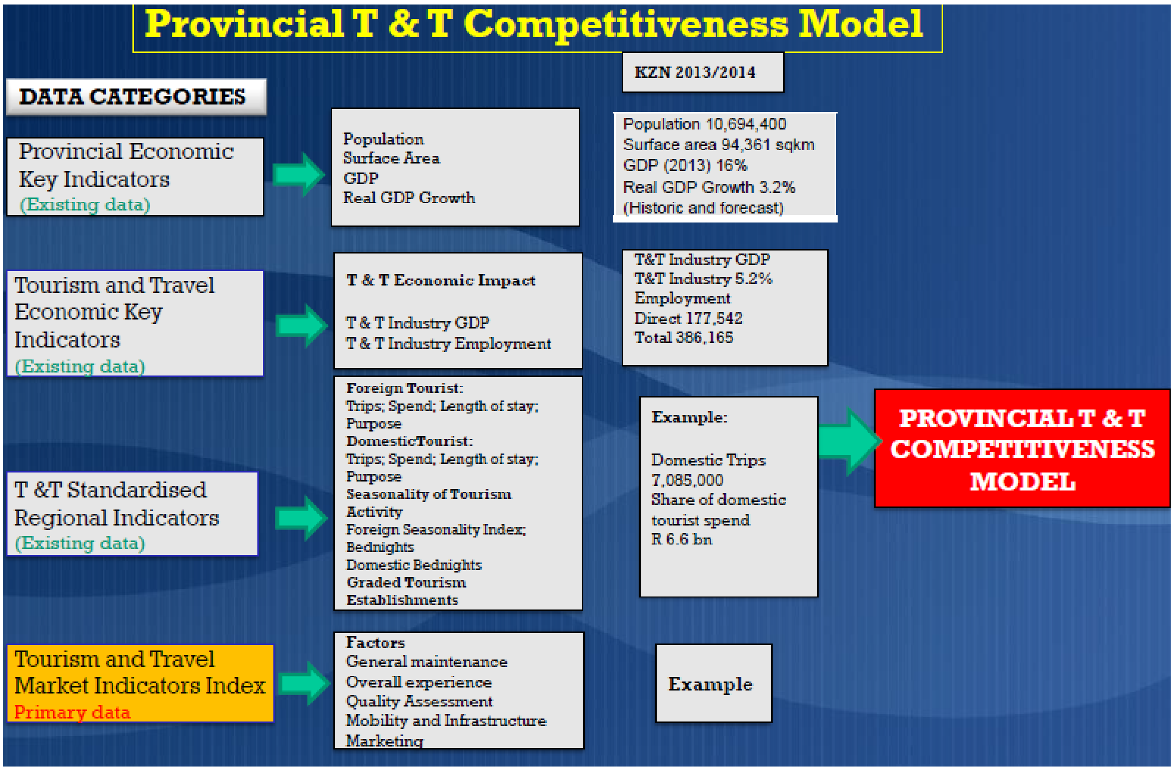
The Travel and Tourism Competitiveness Index (TTCI) of the WEF includes two sections before presenting the actual measures of tourism competitiveness. The first section is where the TTCI presents key economic indicators that give a sense of the size of a country and its economy, for example population, surface area and GDP. This is followed by a section on travel and tourism key indicators and economic impact which provides a measure of the past, current and projected future activity of travel and tourism in each country's economy. This includes data from the Tourism Satellite Accounts, for example industry GDP and projected growth as well as employment in the travel and tourism industry as well as tourist arrivals and expenditure. Thereafter the actual Index follows which measures tourism competitiveness against various factors and indicators according to expert opinion.

It is proposed that in comparing provincial competitiveness a similar approach should be followed, as depicted in the ensuing section.

A provincial tourism competitiveness model for South Africa should consist of the following four categories (shown in figure 20), with each category drawing on data that each province should present for comparison purposes. This will enable provinces to view their progress in achieving their tourism objectives and in identifying the gaps and challenges that need to be addressed.

1. Provincial Economic Key Indicators
2. Provincial Tourism and Travel Economic Key Indicators
3. The standardised Provincial Indicator Table
4. Tourism and Travel Market Indicators Index

**Figure 20: The Provincial T&T Competitiveness Model**




## 10.2. Populating the Model

Provinces should collect data on a regular basis for comparative purposes. Annual statistics are available (or should be available) as far as the key economic indicators and regional tourism indicators are concerned). The data for the Tourism and Travel Market Indicators Index has to be collected via surveys from tourists and provinces should decide on a predetermined cycle of data collection to enable them to establish whether progress is being made and to determine strategic direction and priority areas of concern.

The data for the first three categories is available through the sources indicated below and the data for the fourth category should be collected on a regular basis from tourists (and, while not covered in this study, expanded to industry perceptions as well).

1. Provincial Economic Key Indicators (Data available from StatsSA and relevant Government sources)
2. Provincial Tourism and Travel Economic Key Indicators (as per data collected for the Tourism Satellite Account - StatsSA)
3. The standardised Provincial Indicator Table (the T & T Standardised Regional Indicators as developed by the Provincial Indicator Working Group and approved by the NDT in December 2012)
4. Tourism and Travel Market Indicators Index (primary data collection – similar to the current study as developed by the Division Tourism Management, University of Pretoria). Figures 19 and 20 provide an example of how provinces can be compared on the factors identified within this study.

Table 14 provides an example of existing data under the first three categories for KZN and NC. This example shows different data sources and the gaps that still exist in the data sources which is a cause for concern in provinces which do not have this data available.

**Table 14: An example of how the first three categories can be populated for comparative purposes.**

| **Province Overview** | KZN | NC | |
|---|---|---|---|
| **Provincial Economic Key Indicators** | | | |
| Population | 10 694 400 | 1 145 861 | |
| Surface Area | 94 361 sqkm | 372 889 sqkm | |
| GDP | 16% | *data not available | |
| Real GDP Growth | 3.2% | *data not available | |
| **T&T Economic Key indicators** | | | |

| | | | | |
|---|---|---|---|---|
| T&T Industry GDP | 5.2% | | *data not available | |
| T& T Industry Employment | | | *data not available | |
| Directly (SA 655 609) | 177 542* | | *data not available | *TKZN 2014 |
| Total | 386 165* | | *data not available | *TKZN 2014 |
| **T&T Standardised Regional Indicators** | | | | |
| **Foreign Tourist** | | | | |
| Number of Visitors annually | 847 146 | | 175 446 | Provincial Indicator Table 2013 pg 7 |
| Spend- Total market value | R 6.1 Billion | | R 0.8 Billion | Provincial Indicator Table 2013 pg 12 |
| Length of Stay (Average) | 8.5 nights* | | | *TKZN 2014 |
| Purpose | Oversea and African Air Departures* | Land Departures* | | *TKZN 2014 |
| Holiday | 50% | 16% | *data not available | |
| Business | 24% | 14% | *data not available | |
| VFR | 21% | 57% | *data not available | |
| Other | 5% | 13% | *data not available | |
| **Domestic Tourist** | | | | |
| Tourist trips | 7,085,000 | | 446,000 | Provincial Indicator Table 2013 pg 10 |
| Spend (Total) | R6,6 Billion | | R0.6 Billion | Provincial Indicator Table 2013 pg 14 |
| | | | | |
| Overnight Trip | 6 755 528 000 | | 1 076 063 000 | StatsSA pg 19 |
| Average Length of Stay | 6 | | 5 | StatsSA pg 17 |
| Purpose(%) | | | | SATourism 2013 Annual Tourism Report pg70 |
| VFR | 77 % | | 54% | |
| Holiday | 16% | | 26% | |
| Business | 2% | | 12% | |
| Religious | 3% | | 8% | |
| Medical | 2% | | - | |
| **Seasonality of Tourism Activity** | | | | |
| Foreign Seasonality Index (County wide) | 1.38% | | 1.38% | SATourism 2013 Annual Tourism Report pg134 |
| Bednights | 6 885 027 | | 961 796 | |
| Domestic Bednights* | 6 175 000 | | 677 000 | StatsSa (DTS 2013) pg 15 |
| **Graded Tourism Establishments (Year end March 2014)** | 764 | | 211 | Graded tourism stats 2013 |
| Backpackers & Hostelling | 9 | | 1 | |
| Bed & Breakfast | 232 | | 34 | |
| Caravan & Camping | 11 | | 4 | |
| Country House | 15 | | 2 | |
| Guest House | 146 | | 71 | |
| Lodge | 58 | | 34 | |
| Self Catering | 181 | | 28 | |
| Hotels | 108 | | 24 | |
| MESE (Business Tourism) | 4 | | 13 | |

Notes:

Standardised Provincial Indicator Table
South African Tourism.2014. *2013 Annual Tourism Performance Report*. Johannesburg South African Tourism.
South African Tourism Strategic Research Unit.2015. *2014 Annual Tourism Report*. Johannesburg

Statistics South Africa.2015. *Domestic Tourism Survey 2013*. Pretoria
Tourism Grading Council of South Africa. 2014. *Number of Graded Establishments*.
Tourism KwaZulu Natal. 2014. *Statistics of our Tourism Sector 2014*. KwaZulu Natal
*Data was not available- Calls were made to South African Tourism and it was reported that the statistics are work out using the tourism satellite account (produced by Statsa). This is done at a national level only.
Calls were made to Northern Cape Tourism Authority and they stated that the provincial government tourism department should be able have the stats as they do not.
Calls to numerous employees were made to the Department of Economic Development and Tourism in the Northern Cape, where they stated that they do not have the requests stats for their province.
StatsSA does not provide GDP and employment number for tourism (as an individual industry) per province

The data for the fourth category, namely the Tourism and Travel Market Indicators Index, is derived from market surveys. In this study the focus was on the emerging market and specifically from the tourist perspective. Industry professionals should also be surveyed. Appendix F provides an explanation of how this study could also have been expanded to include perceptions from the industry.

## 11. LIMITATIONS

The following limitations to the study need to be presented:

- A convenience sampling method was used in the application of the survey to potential, past and current visitors. This may affect the generalisation of the results to the populations under study.
- Racial classification is used to define the target groups so the results cannot be generalised to all population groups.
- Two provinces were used to test the model thus the results from the provinces are confined to the two provinces.
- Data collection was conducted out of the peak season (although the September school holidays are within this period). The number of responses may have been affected by the low season data collection period.
- The integrity of the data collected by two fieldworkers was compromised and had to be removed from the dataset.
- Data collection had to be repeated in Limpopo Province due to the first round data being inaccurately collected.
- Certain selected cities were used for data collection thus the geographic spread is limited which could affect the generalisation of the results.

- The current study is cross-sectional so the results will be valid for this study only, whereas the ultimate aim should be a longitudinal study where trends can be determined.

## 12. CONCLUDING NOTE

This study proposes the use of a standardised Provincial Tourism Competitiveness Model using four data categories, three of the categories should be populated through existing data and tools available to province such as the Provincial indicator Table. These categories are the:

1. Provincial Economic Key Indicators
2. Provincial Tourism and Travel Economic Key Indicators
3. Standardised Provincial Indicator Table
4. Tourism and Travel Market Indicators Index

A gap that was evident in this research is that not all provinces have access to data on their province, the case in point is that of the Northern Cape which lacks a great deal of tourism-related economic data. This is an area of concern.

The fourth category relies on the collection of primary data on the factors and indicators identified in this study and referred to as the Tourism and Travel Market Indicators Index. Data should be collected from tourists and industry to enable provinces to be compared on tourism-related factors.

The model should be applied in regular cycles to assess if progress has been made since the previous cycle of measurement and to identify areas of concern.

## 13. STUDENT PROJECTS (NDT BURSARIES)

Please see **Appendix G.**

## 14. RESEARCH OUTPUTS ON NDT PROJECTS

Lubbe, B.A., Douglas, A. Fairer-Wessels, F. & Kruger, E. 2016. Tourism Supply and Demand: How Tourism Products Meet the Needs of Market Segments. *Third World Quarterly*. Submitted

Lubbe, B.A., Douglas, A., Fairer-Wessels, F. Kruger, E. 2015. A model to measure South Africa’s tourism competitiveness. Paper presented at the international Travel and Tourism Research Association (TTRA) Conference in Portland, Oregon, USA, 15 - 17 June 2015.

Lubbe, B.A., Douglas, A., Fairer-Wessels, F. Kruger, E., Geldenhuys, E. & Francis, C. 2013. Matching tourism supply and demand: an analysis of how tourism products meet the needs of emerging domestic markets in selected regions in South Africa. Paper presented at the international Travel and Tourism Research Association (TTRA) Conference in Kansas City, USA, 20 - 22 June 2013.

**Contact details for further information on this report:**

Prof Berendien Lubbe

Head: Division Tourism Management

University of Pretoria

Pretoria

Tel: +27 12 4204102

Cell: +27824521743

Fax: +27124203349

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# APPENDIX A: REGIONAL COMPETITIVENESS STUDIES

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**APPENDIX B: ETHICAL CLEARANCE (SEPARATELY ATTACHED)**

**APPENDIX C: FINAL QUESTIONNAIRE (SEPARATELY ATTACHED)**

**APPENDIX D: RESULTS FROM PRIVATE AND PUBLIC SECTOR FOCUS GROUPS**

**Public Sector - Focus Groups**

***Local Municipality Tourism Practitioners Focus Group***

On the 26th of June a modified focus group was held with representatives from various local municipalities attending a capacity building course for tourism practitioners presented by the University of Pretoria at the Protea Hotel Hatfield. Due to the size of the group it was decided to have a discussion on a questionnaire with both closed and open-ended questions. Factors used in the international competitiveness survey were included, along with one open ended question where respondents could provide any other factors they deemed important, as well as one ranking question where they had to list the top 5 most important factors from both a supply and demand perspective to enhance domestic competitiveness.

These results were used to determine the factors to be included in the survey among domestic tourists, in other words, the factors that tourism experts/practitioners deemed would be important to domestic tourists. The profile of the focus group participants also matched the demographic characteristics of the survey population.

Table 1 indicates the travel and tourism indicators that would be important from a domestic tourist's perspective when choosing a holiday destination. These factors are based on the factors listed in the international competitiveness project; with the aim to determine which of these would become more or less important in a domestic tourism context. The abbreviation before the wording indicates the category to which it belongs (abbreviations explained below the table). The scale used to test the items was a 10-point likert scale ranging from 1 (extremely important) to 10 (not important at all). Table 1 places the items from most to least important, based on the mean scores.

**Table 1: Important factors of competitiveness from a domestic tourism demand perspective**

| | N | Mean | Std. Deviation |
|---|---|---|---|
| 1. Access to drinking water | 28 | 1.07 | .262 |
| 2. Tourist safety | 30 | 1.17 | .531 |
| 3. Service quality | 30 | 1.17 | .379 |
| 4. Tourism branding and image | 30 | 1.30 | .750 |
| 5. Knowledge of what's available (information provision) | 30 | 1.30 | .466 |
| 6. Upkeep of infrastructure | 30 | 1.30 | .596 |
| 7. Maintenance around attractions | 29 | 1.34 | .670 |
| 8. Health care services | 29 | 1.38 | .775 |
| 9. Crime | 29 | 1.41 | .825 |
| 10. Upkeep of facilities | 28 | 1.43 | .690 |
| 11. Marketing campaign dedicated to the domestic market | 30 | 1.47 | .900 |
| 12. Access to electricity | 29 | 1.48 | 1.056 |
| 13. Quality of transport infrastructure | 29 | 1.52 | 1.090 |
| 14. Attitude of locals towards tourists | 29 | 1.55 | .985 |
| 15. Innovative products | 30 | 1.60 | .968 |
| 16. Quality and variety of accommodation | 29 | 1.66 | 1.173 |
| 17. Unique feature | 30 | 1.70 | 1.291 |
| 18. Availability of public transport | 30 | 1.70 | 1.149 |
| 19. Access to internet services | 30 | 1.73 | 1.048 |
| 20. Packaged tours | 30 | 1.73 | 1.202 |
| 21. Availability of alternative routes (not tolled) | 27 | 1.78 | 1.050 |
| 22. Socially responsible practices | 29 | 1.79 | .902 |
| 23. Banks | 30 | 1.87 | 1.106 |
| 24. Environmental management practices | 30 | 1.90 | 1.029 |
| 25. Transformation of the industry (product owners) | 29 | 1.93 | 1.252 |
| 26. Cost of domestic airfare | 30 | 1.97 | 1.426 |
| 27. World heritage sites | 29 | 2.03 | 1.295 |
| 28. Entertainment | 30 | 2.13 | 1.252 |
| 29. Car rental services | 30 | 2.13 | 1.358 |
| 30. Recent history | 29 | 2.28 | 1.579 |
| 31. Bribery and corruption | 28 | 2.29 | 1.997 |
| 32. Distances travelled | 29 | 2.31 | 1.365 |
| 33. Resorts | 29 | 2.41 | 1.402 |
| 34. Cost of public transport | 30 | 2.50 | 1.656 |

| | | | |
|---|---|---|---|
| 35. Cultural diversity | 30 | 2.53 | 1.907 |
| 36. Languages spoken | 29 | 2.59 | 1.680 |
| 37. Cost of toll fees | 30 | 2.60 | 1.610 |
| 38. Fauna & flora | 29 | 2.62 | 1.840 |
| 39. Conference centres | 29 | 2.66 | 2.023 |
| 40. Adventure tourism | 29 | 2.69 | 1.417 |
| 41. Cultural events | 29 | 2.69 | 2.123 |
| 42. Big brands | 30 | 2.70 | 1.745 |
| 43. Wine and food | 29 | 2.76 | 2.132 |
| 44. Beaches | 30 | 2.83 | 2.198 |
| 45. Wildlife | 30 | 2.83 | 2.102 |
| 46. Sport events | 29 | 2.90 | 1.988 |
| 47. History | 30 | 2.97 | 2.341 |
| 48. Shopping | 30 | 3.00 | 1.661 |
| 49. Sport participation | 29 | 3.00 | 1.604 |
| 50. Conference facilities | 30 | 3.07 | 2.303 |
| 51. Hiking | 29 | 3.10 | 1.496 |
| 52. Climate | 29 | 3.14 | 2.100 |
| 53. Casinos | 29 | 3.59 | 1.842 |

Respondents were asked to list the top 5 factors. Table 2 indicates the factors based on a weighted score assigned to factors as they were mentioned across the 5 positions. A score of 0 indicates that the factor was never rated as being among the top 5 most important factors. It provides a more effective representation of the relative importance of the factors, i.e. considering all others. For example, access to drinking water achieved the highest mean score, but fell to 12$^{th}$ position. Crime moved up to the 3$^{rd}$ most important consideration from 9$^{th}$ position. Factors related to product offerings were placed last in both instances (as can be seen in Table 1 and 2) – indicating that these items could be considered less important for the domestic leisure market and possibly excluded from further testing.

**Table 2: Most important factors based on ranked score**

| | |
|---|---|
| 1. Tourist safety | 69 |
| 2. Other* | 60 |
| 3. Crime | 30 |
| 4. Upgrade/upkeep of general infrastructure | 26 |
| 5. Quality of transport infrastructure | 23 |
| 6. Knowledge of what is available | 23 |
| 7. Quality of service | 21 |
| 8. Innovative tourism products | 19 |
| 9. Tourism branding and image | 19 |
| 10. Health care services | 16 |
| 11. Effective marketing campaign | 12 |
| 12. Access to water | 10 |
| 13. Transformation of the industry | 10 |
| 14. Maintenance around tourist attractions | 8 |
| 15. A unique feature | 8 |
| 16. Attitude of locals toward tourists | 8 |
| 17. Distances travelled | 8 |
| 18. Access to electricity | 7 |
| 19. Upkeep of facilities (products) | 6 |
| 20. Availability of public transport | 6 |
| 21. Wildlife | 5 |
| 22. Adventure tourism | 5 |
| 23. Climate | 4 |
| 24. Recent history | 4 |
| 25. Conference facilities | 4 |
| 26. Availability of internet services | 4 |
| 27. Quality and variety of accommodation | 4 |
| 28. Packaged tours | 4 |
| 29. World heritage sites | 3 |
| 30. Entertainment | 2 |
| 31. Availability of car rental services | 2 |
| 32. Environmental management practices | 2 |
| 33. Socially responsible practices | 1 |
| 34. Wine and food | 0 |
| 35. Sport participation | 0 |
| 36. Climate | 0 |
| 37. Fauna and flora | 0 |
| 38. Languages spoken | 0 |
| 39. Beaches | 0 |
| 40. Resorts | 0 |
| 41. Casino's | 0 |
| 42. Shopping | 0 |
| 43. Hiking | 0 |

| | |
|---|---|
| 44. Sport events | 0 |
| 45. Cultural events | 0 |
| 46. Cultural diversity | 0 |
| 47. History | 0 |
| 48. Availability of alternative routes | 0 |
| 49. Banks | 0 |
| 50. Conference centres | 0 |
| 51. Availability of big brands | 0 |
| 52. Cost of toll fees | 0 |
| 53. Cost of public transport | 0 |
| 54. Cost of domestic airfare | 0 |
| 55. Bribery and corruption | 0 |

Factors listed by respondents under ‘Other’ included items that could be categorised with existing factors in the scale. A few additional items were mentioned (indicated in bold in Table 3) and were considered for further inclusion. The factors are listed in Table 3 in descending order based on number of mentions.

**Table 3: Additional factors (‘Other’)**

| Item | Number of mentions |
|---|---|
| **Affordability** | **4** |
| **Culturally accommodating facilities (e.g. kitchens, food)** | **3** |
| **Accredited/registered tourist guides** | **2** |
| Information provision | 2 |
| **Seasonality** | **2** |
| **Signage** | **2** |
| Accessibility (easy) | 1 |
| Adventure activities (Cycling; boat cruize, bungy jumping, swing in trees) | 1 |
| Airports | 1 |
| **Authenticity of culture and heritage products** | **1** |
| **Child/family friendly** | **1** |
| **Community involvement (story telling; chance to engage with locals)** | **1** |
| **Experience for whole family** | **1** |
| Experiences | 1 |
| Grading | 1 |
| **Heritage route development** | **1** |
| Safety of roads in terms of roaming animals/wildlife | 1 |
| **Universally accessible products** | **1** |

The second part of the questionnaire related to supply-side issues affecting domestic tourism competitiveness. Table 4 indicates the travel and tourism indicators that would be important from the supply side of domestic tourism. The scale used to test the items was a 10-point likert scale ranging from 1 (extremely important) to 10 (not important at all). Table 4 places the items from most to least important, based on the mean scores.

**Table 4: Important factors of competitiveness from a domestic tourism supply perspective**

| | N | Mean | Std. Deviation |
|---|---|---|---|
| 1. Political will | 29 | 1.45 | .870 |
| 2. Sharing of information | 30 | 1.57 | .971 |
| 3. Budget allocation | 30 | 1.57 | 1.357 |
| 4. Awareness of importance of tourism | 29 | 1.59 | .983 |
| 5. Maintenance attractions | 30 | 1.60 | 1.192 |
| 6. Skills development | 30 | 1.70 | 1.418 |
| 7. Leadership | 30 | 1.70 | 1.179 |
| 8. Public-private partnerships | 30 | 1.73 | 1.230 |
| 9. Transformation | 30 | 1.77 | 1.251 |
| 10. Marketing campaign | 30 | 1.80 | 1.400 |
| 11. Communication at government levels | 30 | 1.83 | 1.440 |
| 12. Unique feature | 29 | 2.03 | 1.721 |
| 13. Innovative products | 30 | 2.13 | 1.332 |
| 14. Emphasis on domestic tourism | 30 | 2.23 | 1.736 |
| 15. Government structures | 30 | 2.37 | 1.608 |
| 16. Big brands | 30 | 3.47 | 2.432 |

Respondents were asked to list the top 3 factors. Table 5 indicates the factors based on a weighted score assigned to factors as they were mentioned across the 3 positions. A score of 0 indicates that the factor was never rated as being among the top 3 most important factors. It provides a more effective representation of the relative importance of the factors, i.e. considering all others.

**Table 5: Most important factors based on ranked score**

| Factor | Ranked score |
|---|---|
| 1. Budget allocation for tourism development | 31 |
| 2. Skills development | 23 |
| 3. Other* | 22 |
| 4. Focused marketing campaign for the domestic market | 15 |
| 5. Making tourism a priority (political will) | 12 |
| 6. A unique feature | 9 |
| 7. Maintenance and development around tourist attractions | 9 |
| 8. Public-private partnerships | 9 |
| 9. Transformation of the industry | 8 |
| 10. Government structures that promote tourism development | 8 |
| 11. Provincial communication between different levels of government | 5 |
| 12. Leadership | 4 |
| 13. Innovative tourism products (diverse offering) | 3 |
| 14. Sharing of information | 3 |
| 15. Awareness of the importance of tourism | 2 |
| 16. Emphasis on domestic tourism | 0 |
| 17. Availability of big brands | 0 |

Factors listed by respondents under 'Other' are listed in Table 6 in descending order based on number of mentions.

**Table 6: Additional factors ('Other')**

| Item | Number of mentions |
|---|---|
| Affordability | 6 |
| Community involvement/projects | 3 |
| Deeper understanding of the domestic market | 3 |
| Information of offerings available | 2 |
| Signage | 2 |
| Universal accessibility | 2 |
| Access | 1 |
| Adventure | 1 |
| Cross-border tourism initiatives | 1 |
| Cultural sensitive customer care | 1 |
| Legislation specific to tourism | 1 |
| Licensing for township tourism process | 1 |
| Marketability of local municipality owned attractions | 1 |

| | |
|---|---|
| Packaged tours | 1 |
| Police visibility to ensure safety | 1 |
| Product positioning | 1 |
| Protection of tourist attractions | 1 |
| Synergy between strategies and plans | 1 |
| Township tours | 1 |
| Trade and investment facilitation | 1 |
| wifi spots in townships | 1 |

***NDT and SAT Focus Group***

On 22 July 2015, a focus group was held at the offices of the National Department of Tourism (NDT) in Pretoria, with three representatives from the NDT and three representatives from SA Tourism (SAT). The purpose of the focus group was to gain an understanding of supply side issues within the tourism industry that influence the industry's ability to satisfy the emerging domestic market, as well as to grasp the needs of the domestic emerging market and the extent to which existing products are capable of catering to their needs.

When discussing the supply side of the tourism industry, and more specifically the shortcomings within the industry, three distinct themes transpired. The first theme related to the lack of diversity of the product offering. The emerging domestic market is so diverse, and wants different things from the product offering. These needs are currently not being acknowledged by the tourism industry, because the tourism industry is focused on meeting the needs of the international market and not the domestic market. For example, the emerging market is a social market. They are family oriented and create memories around the group with whom they travel. Most product owners do not cater for big groups and still charge on a per person basis, rather than a per room basis. Participants also felt that the spirit of Ubuntu is not evident in the tourism industry, and that product owners are often not willing to accommodate different needs. The second theme considered the issue of affordability. Participants agreed that this could be a big barrier to travel. They mentioned that the emerging market would prefer to stay at a hotel, because they know what they will get there and have a need to be pampered, but they cannot afford it. The last theme emphasised marketing and information sharing as hampering the tourism industry. Often the emerging market feels that they have no reason to travel, simply because they do not have any information on the tourism industry. They do not know what is happening in the industry, because no information is being shared by the national and provincial tourism bodies.

Next, the demand side was discussed and more specifically what the domestic emerging market wants. The social aspect related to travelling came out very strongly, and was identified to be the core driver. The emerging market wants to bond and connect through travel. They require moments to connect in outdoor spaces, at the beach or in nature. Visiting friends and relatives was also one of the main motivators to travel. Participants mentioned that these travellers should be educated to engage in tourist activities while visiting friends and relatives. Again, the issue of information sharing and marketing is of importance here. The emerging market also wants to learn or be educated while travelling, but not necessarily only about culture and history. Their emotional attachment to the history of South Africa causes this subject to be seen as “heavy”. There needs to be a balance between history and contemporary culture, when travelling. Participants also highlighted the fact that many of the emerging market tourists prefer to go overseas because it is seen as better priced and better value than certain domestic destinations such as Cape Town. For first time emerging market travellers, travelling locally is also seen as being overwhelming. Service levels within the tourism industry were also seen as a matter that demands serious attention. Public transport is still seen as a subject that should be addressed. South Africa is not seen as having the infrastructure to travel inexpensively. Flights are also too expensive. Because of the logistics and costs involved in domestic travel, many of the emerging market just regress back to their usual holiday plans, and do not want to try something new. Possible solutions to this problem were differential pricing, and loyalty cards.

**Private Sector - SATSA Conference 13 to 16 August 2015**

The South African Tourism Services Association Conference held in Fancourt on 13 – 16 August 2015 was attended by Prof Lubbe with the purpose of ascertaining what the private sector regarded as important for domestic tourism to grow.

A number of concerning issues that impact domestic tourism came to the fore:

- Skills development in quality of service, communication and language skills and overall tourism knowledge;
- Responsible tourism, with particular reference to conservation and community involvement;
- Fragmentation of industry, particularly amongst small operators;

Unlocking the value of domestic tourism requires:

- Understanding the emerging middle class;
- Marketing tourism in regions through experiences and good packaging;
- Stimulating a travel yearning among the emerging young travellers;
- Understanding market segments by "de-averaging" the emerging market and other potential visitors;
- Understanding that the emerging market is looking for education, status, new experiences, affordability.

Apart from the above issues that were identified in previous rounds (literature and focus groups) it was deemed important to include the following in the final questionnaire:

- What inspired the emerging market to travel
- First or subsequent trip
- Accessibility of transport modes for travel to other provinces
- Purpose of trip
- Experience of trip
- Impact of events for the domestic emerging market.

## APPENDIX E: INDIVIDUAL ITEMS AND DATA TO SCORE EACH FACTOR

| | | Possible | HAVE VISITED | | | | HAVE NOT VISITED | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| FACTOR | Weight | Total | NC score | NC w/score | KZN score | KZN w/score | NC score | NC w/score | KZN score | KZN w/score |
| Quality and infrastructure | | | | | | | | | | |
| Safety and security | 37 | 370 | 7.72 | 285.64 | 7.98 | 295.26 | 7.54 | 278.98 | 7.84 | 290.08 |
| Healthcare services | 33 | 330 | 7.51 | 247.83 | 8.13 | 268.29 | 7.31 | 241.23 | 8.06 | 265.98 |
| Water | 38 | 380 | 7.63 | 289.94 | 8.61 | 327.18 | 7.35 | 279.3 | 8.37 | 318.06 |
| Service quality | 35 | 350 | 7.74 | 270.9 | 8.25 | 288.75 | 7.42 | 259.7 | 8.01 | 259.7 |
| Electricity | 36 | 360 | 8.15 | 293.4 | 8.58 | 308.88 | 7.76 | 279.36 | 8.36 | 300.96 |
| Value for money/affordability | 32 | 320 | 6.99 | 223.68 | 8.24 | 263.68 | 6.85 | 219.2 | 7.93 | 253.76 |
| Clean/hygienic environment | 34 | 340 | 7.5 | 255 | 8 | 272 | 7.31 | 248.54 | 7.71 | 262.14 |
| Signage | 31 | 310 | 7.45 | 230.95 | 8.3 | 257.3 | 7.17 | 222.27 | 8.26 | 256.06 |
| Transport infrastructure | 30 | 300 | 7.24 | 217.2 | 8.22 | 246.6 | 7.03 | 210.9 | 8.19 | 245.7 |
| Attitude of local toward tourists | 23 | 230 | 7.42 | 170.66 | 8.05 | 185.15 | 7.16 | 164.68 | 7.77 | 178.71 |
| Internet | 21 | 210 | 7.21 | 151.41 | 8.3 | 174.3 | 7.24 | 152.04 | 8.14 | 170.94 |
| | Sub-total | 3500 | 82.56 | 2636.61 | 90.66 | 2887.39 | 80.14 | 2556.2 | 88.64 | 2802.09 |
| | SCORE | | | 75.33171 | | 82.49685714 | | 73.034286 | | 80.05971429 |
| Marketing and social responsibility | | | | | | | | | | |
| Marketing campaign for domestics | 11 | 110 | 6.7 | 73.7 | 8.13 | 89.43 | 6.63 | 72.93 | 8.03 | 88.33 |
| Environmental responsibility | 8 | 80 | 6.85 | 54.8 | 7.81 | 62.48 | 6.83 | 54.64 | 7.65 | 61.2 |
| Transformation | 6 | 60 | 5.19 | 31.14 | 7.8 | 46.8 | 5.61 | 33.66 | 7.71 | 46.26 |
| Tourism brand and image | 17 | 170 | 7.06 | 120.02 | 8.22 | 139.74 | 6.95 | 118.15 | 8.07 | 137.19 |
| Information on offering | 24 | 240 | 6.76 | 162.24 | 8.24 | 197.76 | 6.76 | 162.24 | 8.11 | 194.64 |
| Packaged tours | 1 | 10 | 7 | 7 | 7.78 | 7.78 | 6.95 | 6.95 | 7.44 | 7.44 |
| | Sub-total | 670 | 39.56 | 448.9 | 47.98 | 543.99 | 39.73 | 448.57 | 47.01 | 535.06 |
| | SCORE | | | 67 | | 81.19253731 | | 66.950746 | | 79.85970149 |
| Primary product features | | | | | | | | | | |
| Nature reserves/national parks | 5 | 50 | 7.02 | 35.1 | 7.82 | 39.1 | 6.95 | 34.75 | 7.67 | 38.35 |
| Wildlife | 2 | 20 | 6.74 | 13.48 | 7.65 | 15.3 | 6.81 | 13.62 | 7.53 | 15.06 |
| World Heritage Sites | 4 | 40 | 6.85 | 27.4 | 7.77 | 31.08 | 6.87 | 27.48 | 7.79 | 31.16 |
| Recent history | 3 | 30 | 7.11 | 21.33 | 7.72 | 23.16 | 7.11 | 21.33 | 7.69 | 23.07 |
| Unique feature | 19 | 190 | 8.05 | 152.95 | 8.22 | 156.18 | 7.44 | 141.36 | 8.02 | 152.38 |
| Climate | 13 | 130 | 7.01 | 91.13 | 8.33 | 108.29 | 6.74 | 87.62 | 7.97 | 103.61 |
| | Sub-total | 460 | 42.78 | 341.39 | 47.51 | 373.11 | 41.92 | 326.16 | 46.67 | 363.63 |
| | SCORE | | | 74.2152174 | | 81.11086957 | | 70.904348 | | 79.05 |
| Secondary product features | | | | | | | | | | |
| Beaches | 15 | 150 | 6.74 | 101.1 | 8.63 | 129.45 | 6.82 | 102.3 | 8.23 | 123.45 |
| Adventure activities | 9 | 90 | 6.87 | 61.83 | 8.24 | 74.16 | 6.97 | 62.73 | 7.92 | 71.28 |
| Entertainment | 25 | 250 | 7.42 | 185.5 | 8.55 | 213.75 | 7.28 | 182 | 8.21 | 205.25 |
| Public transport | 20 | 200 | 7.46 | 149.2 | 8.27 | 165.4 | 7.07 | 141.4 | 8.08 | 161.6 |
| Car rental service | 14 | 140 | 7.01 | 98.14 | 8.25 | 115.5 | 6.97 | 97.58 | 7.97 | 111.58 |
| Alternative routes | 18 | 180 | 8.09 | 145.62 | 7.93 | 142.74 | 7.85 | 141.3 | 7.71 | 138.78 |
| | Sub-total | 1010 | 43.59 | 741.39 | 49.87 | 841 | 42.96 | 727.31 | 48.12 | 811.94 |
| | SCORE | | | 73.4049505 | | 83.26732673 | | 72.010891 | | 80.39009901 |
| General maintenance and product character | | | | | | | | | | |
| Upgrade of general infrastructure | 29 | 290 | 7.5 | 217.5 | 8.51 | 246.79 | 7.17 | 207.93 | 8.06 | 233.74 |
| Maintenance around tourist attractions | 26 | 260 | 7.31 | 190.06 | 8.27 | 215.02 | 7.13 | 185.38 | 8 | 208 |
| Upkeep attractions facilities | 28 | 280 | 7.38 | 206.64 | 8.23 | 230.44 | 7.18 | 201.04 | 8.11 | 227.08 |
| Product variety | 27 | 270 | 7.25 | 195.75 | 8.3 | 224.1 | 7.01 | 189.27 | 8.11 | 218.97 |
| Authentic products/services | 16 | 160 | 7.32 | 117.12 | 8.13 | 130.08 | 7.11 | 113.76 | 7.96 | 127.36 |
| | Sub-total | 1260 | 36.76 | 927.07 | 41.44 | 1046.43 | 35.6 | 897.38 | 40.24 | 1015.15 |
| | SCORE | | | 73.5769841 | | 83.05 | | 71.220635 | | 80.56746032 |
| Overall experience and accessibility | | | | | | | | | | |
| Family friendly environment | 22 | 220 | 7.54 | 165.88 | 8.19 | 180.18 | 7.33 | 161.26 | 8.04 | 176.88 |
| Facilities for disabled | 10 | 100 | 7.61 | 76.1 | 8.04 | 80.4 | 7.51 | 75.1 | 7.71 | 77.1 |
| Cultural sensitive businesses | 12 | 120 | 7.17 | 86.04 | 7.93 | 95.16 | 7.07 | 84.84 | 7.71 | 92.52 |
| Distance traveled | 7 | 70 | 7.39 | 51.73 | 7.76 | 54.32 | 7.31 | 51.17 | 7.62 | 53.34 |
| | Sub-total | 510 | 29.71 | 379.75 | 31.92 | 410.06 | 29.22 | 372.37 | 31.08 | 399.84 |
| | SCORE | | | 74.4607843 | | 80.40392157 | | 73.013725 | | 78.4 |
| | GTOTAL | 7410 | 274.96 | 5475.11 | 309.38 | 6101.98 | 269.57 | 5327.99 | 301.76 | 5927.71 |
| | SCORE | | | 73.8881242 | | 82.34790823 | | 71.902699 | | 79.99608637 |

**APPENDIX F: SURVEYING INDUSTRY PROFESSIONALS**

One of the limitations of this index is that the supply side aspects of provincial competitiveness were not measured and incorporated into the index. A suggestion for future research is to include the supply side view in the index. This could be done by distributing a survey, focusing on the following themes (as indicated in table X below), amongst the role players within the tourism industry supply side in the provinces, such as government officials, accommodation, transport, attraction providers etc. Respondents could then be asked to ascertain the level of performance of these aspects in ensuring that a province is competitive for the emerging domestic tourism market.

The themes as provided in Table X, were identified during focus groups held with domestic tourism experts in 2015. Unfortunately, due to time constraints, only the public sector was approached, to partake in the focus groups. Future research should also incorporate the views of the private sector. The experts were asked to list what they regard as important aspects that the industry, government and other role players should do to ensure that a province is a competitive leisure destination for the emerging domestic tourism market. Content analysis was used to analyse this data and themes and sub-themes were identified.

From the table it is clear that the most important aspect to ensure that a province is competitive when viewed from the supply side has to do with issues related to government. This theme was mentioned 28 times by respondents. Sub-themes identified under "***tourism in government***", ranged from matters connected to policies and legislation; communication and relations across government spheres including public and private sector partnerships; leadership; leadership (strategy, a vision for the province); increasing the budget for tourism and prioritizing tourism. The second most important theme (when considering the number of times it was mentioned) related to ***infrastructure***. Universal accessibility came out strongly as a sub-theme, as did accessibility in general, and the development, maintenance and upgrading of attractions. The third most mentioned theme was "***product***", and included sub-themes such as the diversity of product offerings; aspects related to quality and service excellence; the development of niche/unique offerings and a focus on group packages. The fourth theme considered ***pricing and affordability***. Sub-themes included discount for domestic travellers and groups, lower prices during low season and the introduction of loyalty programmes for repeat visitors.

In the ***marketing*** theme, emphasis was placed on branding, creating awareness, and personalization of the marketing message, as well as marketing that focuses on the domestic market. The next theme that transpired was ***community and stakeholders,*** with sub-themes such as community awareness campaigns, how communities should be capacitated to become involved in the tourism industry, proper consultation between all stakeholders, and the combination of efforts from all stakeholders. The last theme was named "***other***" and included issues such as how to cater to the emerging market, the importance of conducting research and sharing information, and lastly aspects related to safety and security.

| THEME | NUMBER OF TIMES MENTIONED |
|---|---|
| **TOURISM IN GOVERNMENT**<br>Policies & Legislation (transformation; skills development etc.)<br>Communication and relations across government spheres<br>Leadership<br>Budget for tourism<br>Priority of tourism in government | 28 |
| **INFRASTRUCTURE**<br>Universal accessibility<br>General accessibility<br>Development, maintenance and upgrading of attractions | 21 |
| **PRODUCT**<br>Diversity of product offering<br>Service excellence<br>Responsible tourism<br>Unique/Niche products (heritage/cultural, adventure, township. Community based tourism)<br>Group packages | 18 |
| **PRICING AND AFFORDABILITY**<br>Discount for local travellers<br>Lower prices during low season<br>Discounts for groups<br>Loyalty programmes | 17 |
| **MARKETING**<br>Branding<br>Creating awareness<br>Personalization<br>Marketing focusing on the domestic market | 17 |
| **COMMUNITY AND STAKEHOLDERS**<br>Community tourism awareness campaigns<br>Communities should be capacitated<br>Proper consultation<br>Stakeholders should combine their efforts | 16 |
| **OTHER**<br>Emerging market<br>*Catering to their needs*<br>*Educate product owners on market preferences, culture and habits*<br>Research and information<br>Safety and security | <br>6<br><br><br>6<br>4 |

## APPENDIX G

**PROGRESS ON STUDENTS SPONSORSHIP RECEIVED FROM NDT**

**STUDENTS' PROGRESS REPORT: UP – Economic and Management Sciences: Division of Tourism Management.**

| NO | STUDENT NAME | YEAR STUDENT SPONSOR-ED | TITLE OF RESEARCH TOPIC | LEVEL OF POST - GRADUATE | STUDY PROGRESS | YEAR COMPLE-TED |
|---|---|---|---|---|---|---|
| 1 | Kaela Sipula (R10 000) Plus R10K supplemented from another account. | 2016 | Topic will be selected in May 2016 | Honours | In progress | |
| 2 | Dean Dodd (R20 000) | 2016 | Topic will be selected in May 2016 | Honours | In progress | |
| 3 | Karen Tasara (R20 000) | 2016 | Topic will be selected in May 2016 | Honours | In progress | |
| 4 | Mary Weber (R20 000) | 2016 | Topic will be selected in May 2016 | Honours | In progress | |
| 5 | Yolandi Engelbrecht (R20 000) | 2016 | Topic will be selected in May 2016 | Honours | In progress | |
| 6 | Marian Nel (R5000) | 2015 | Comparing the competiveness of Johannesburg and Durban as a conference destination | Honours | Completed | 2015 |
| 7 | Kaitlin Friend (R5000) | 2015 | Comparing the competiveness of Johannesburg and Durban as a conference destination | Honours | Completed | 2015 |

| NO | STUDENT NAME | YEAR STUDENT SPONSOR-ED | TITLE OF RESEARCH TOPIC | LEVEL OF POST - GRADUATE | STUDY PROGRESS | YEAR COMPLE-TED |
|---|---|---|---|---|---|---|
| 8 | Angelica Mills (R5000) | 2015 | Comparing the competiveness of Johannesburg and Durban as a conference destination | Honours | Completed | 2015 |
| 9 | Precious Khumalo (R5000) | 2015 | Assessing the competitivenes s of the city tourist transport modes in Cape town and Johannesburg | Honours | Completed | 2015 |
| 10 | Bonga Sangqu (R5000) | 2015 | Assessing the competitivenes s of the city tourist transport modes in Cape town and Johannesburg | Honours | Completed | 2015 |
| 11 | Vanessa Siakam (R5000) | 2015 | Assessing the competitivenes s of the city tourist transport modes in Cape town and Johannesburg | Honours | Completed | 2015 |
| 12 | Luke Downing (R5000) | 2015 | Identifying the factors influencing Cape Town's competitivenes s as an incentive destination. | Honours | Completed | 2015 |
| 13 | Dustin Pringle (R5000) | 2015 | Identifying the factors influencing | Honours | Completed | 2015 |

| NO | STUDENT NAME | YEAR STUDENT SPONSOR-ED | TITLE OF RESEARCH TOPIC | LEVEL OF POST - GRADUATE | STUDY PROGRESS | YEAR COMPLE-TED |
|---|---|---|---|---|---|---|
| | | | Cape Town's competitiveness as an incentive destination | | | |
| 14 | Phetsile Fani (R25 000) | 2014 | Domestic Tourism as an Indicator of South Africa's Competitiveness: A Study of the Emergence of the Black Middle Class. | Masters | In progress | - |
| 15 | Nandipha David (R5000) | 2014 | The Role of Infrastructure and Accessibility on the Competiveness of an Ecotourism Destination. | Masters | In progress | - |
| 16 | Claire Putter (R10 000) | 2014 | South Africa's Competitiveness in Relation to Physiography and Climate: Perceptions and Experiences of International Tourists | Honours | Completed | 2014 |
| 17 | Nosiphiwo Mahlangu (R10 000) | 2014 | South Africa's Competitiveness in Relation to Physiography and Climate: Perceptions and Experiences of International | Honours | Completed | 2014 |

| NO | STUDENT NAME | YEAR STUDENT SPONSOR-ED | TITLE OF RESEARCH TOPIC | LEVEL OF POST - GRADUATE | STUDY PROGRESS | YEAR COMPLE-TED |
|---|---|---|---|---|---|---|
| | | | Tourists | | | |
| 18 | Chanelle du Plessis (R10 000) | 2014 | Availability of special events as a motivational factor for inbound tourist | Honours | Completed | 2014 |
| 19 | Nobahle Hlela (R10 000) | 2014 | Visitor Perceptions of Safety and Security on the Competitiveness of South Africa as a Tourism Destination | Honours | Completed | 2014 |
| 20 | Liesl Kruse (R10 000) | 2014 | South Africa's Competitiveness in Relation to Physiography and Climate: Perceptions and Experiences of International Tourists | Honours | Completed | 2014 |
| 21 | Leslie-Ann Ncube (R10 000) | 2014 | Visitor Perceptions of Safety and Security on the Competitiveness of South Africa as a Tourism Destination | Honours | Completed | 2014 |
| 22 | Frans-Marie Scheppers (R10 000) | 2014 | Availability of special events as a motivational factor for inbound tourist | Honours | Completed | 2014 |

| NO | STUDENT NAME | YEAR STUDENT SPONSOR-ED | TITLE OF RESEARCH TOPIC | LEVEL OF POST - GRADUATE | STUDY PROGRESS | YEAR COMPLE-TED |
|---|---|---|---|---|---|---|
| 23 | Rentia van der Walt (R12 500) | 2013 | The importance of varied indicators for current international inbound markets visiting South Africa. | Masters | Completed | 2014 |
| 24 | Kelly Summerfield (R12 500) | 2013 | Brand South Africa: determining the impact of identity and image on tourists" behavioural intentions: the case of brand South Africa. | Masters | Completed | 2014 |
| 25 | Eileen Geldenhuys | 2013 | Studies terminated | PHD | Terminated- has paid money back. | - |
| | | | | | | |
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