Towards a model to enhance Africa's sustainable Tourism Competitiveness

Ernie Heath
Department of Tourism Management
University of Pretoria

ABSTRACT

The tourism environment is becoming increasingly competitive, dynamic and impacted by various global issues. Key factors such as changing consumer preferences, the increasing involvement of host communities, safety and health concerns, globalisation of the airline industry, technological innovation and environmental pressures are changing the face of international tourism and by implication are posing new challenges to tourism destinations in Africa.

Against this background, this article focuses on the changing shape and direction of international tourism; Africa's current and future tourism position and potential; the key role of tourism in addressing Africa's key challenges, including poverty alleviation; and then proposes a sustainable destination competitiveness model that can be used as a frame of reference to enhance Africa's tourism competitiveness.

The competitiveness model that is proposed is based on an analysis of leading international tourism destination development and marketing strategies so as to determine key "best practice" trends and destination competitiveness success indicators. Furthermore, key destination competitiveness models, including recent models developed by Crouch & Ritchie (2000), Kim (2000) and Dwyer (2001) were evaluated, and where appropriate, elements of these models were also included in the proposed competitiveness model.

The longer-term benefits of the development and further refinement of this model along with an associated set of indicators that enables identification of the relative strengths and weaknesses of different tourism destinations, is that it could be used by Governments and industry at large to increase tourism numbers, expenditure and positive social, economic and environmental impacts.

Article

INTRODUCTION

The well-known futurist, John Naisbitt, writer of books such as *Megatrends 2000* and *Global Paradox* states that *"… there are three paradigm service industries that will drive the service led economies of the 21st century - telecommunications, information technology and …tourism"* (Naisbitt 1994). This reference to tourism as a key driving force of the next millennium appears to be justified when considering the following tourism statistics provided by the World Travel and Tourism Council (WTTC 2001): "Based on simulated Tourism Satellite Accounting for 160 countries in the year 2000, the direct and indirect impact of travel and tourism was estimated to contribute Gross Domestic Product of US$3,575 billion, representing 10,8 per cent of the total world product and generating 192 million jobs, representing 8 per cent of total employment world-wide".

A key question that will be answered in this paper is: Where does Africa and specifically Southern Africa stand in this industry with so much growth potential, and what can be done to optimize this potential?

The new tourism articulated by Poon (1993), and the global trend toward non-traditional destinations and long-haul travel, point to changing traveller wants in terms of destination experience – providing a major window of opportunity for destinations in Africa. Unfortunately Africa appears to be performing below its potential, particularly if the following statement contained in a 1997 *World Tourism Report on Africa* holds true: "the region remains an undeveloped market, a blank on the world tourism map". As will be indicated in this paper, this possible situation can be turned around through a shared vision; strong leadership; a co-ordinated effort among all stakeholders; and by addressing the key factors required to ensure sustainable international competitiveness as outlined in the proposed model.

FUTURE DIRECTION OF TOURISM

Analyses from the World Travel and Tourism Council (WTTC), World Tourism Organisation (WTO), national governments and major industry operators all conclude that the growth in domestic and international tourism in recent decades will continue up to, and well beyond the year 2010. All indications are that tourism will play an increasingly important economic and political role on the world stage. The WTO forecasts that the growth in international tourist arrivals to 2005 will be approximately four per cent per annum. WTTC's research estimates that this growth in demand for tourism will generate a total output of US$7,1 trillion and create 130 million new jobs in the international travel and tourism industry by 2006 (WTTC 1996).

The WTO's 2020 Vision

In 1997, the World Tourism Organisation (WTO) published a forecast of tourism in the year 2020 based on a survey conducted with national tourist authorities from 85 countries and a Delphi survey of 50 experts. The report, *Tourism 2020 Vision* (WTO 1999), which was updated in 1999 to include the economic crisis in Asia, presents predictions about the development of the sector and the market, arrivals and receipt trends worldwide and discusses factors shaping tourism in the twenty-first century.

Some of the key trends outlined in the report that could direct the future shape and direction of tourism include:

- International tourist arrivals are forecast to top one billion in 2010 and reach close to 1,6 billion in 2020. These volumes represent an overall average annual growth rate of 4,1 per cent between 1995 and 2020.

- Europe will remain the largest receiving region, though its below global average rate of increase between 1995-2020 (3,5 per cent p.a.) will result in a decline in market share from 55 per cent to 47 per cent. East Asia and the Pacific, increasing at 6,5 per cent p.a., will pass the Americas (up 3,1 per cent p.a.) as the second largest receiving region, holding a 26 per cent market share in 2020 as against 15 per cent by the Americas. The respective shares of Africa, the Middle East and South Asia will all record some increase to four per cent, two per cent and one per cent respectively by 2020.

- One of the principal features of the expansion of international tourism over the 25-year period is the rise in the long-haul share of arrivals, with tourists traveling greater distances. By 2020, the global intraregional long-haul split will be 76:24 with average annual growth rates between 1995-2020 of 3,8 per cent and 5,4 per cent respectively.

- Europe will remain the world's largest generating region, being responsible for almost one half of tourist arrivals worldwide despite its modest annual growth rate between 1995-2020 (3,5 per cent p.a.). International arrivals from East Asia and the Pacific will grow slowly until the year 2000, but during the first decade of the new millennium the pent up demand for travel will ensure that the region becomes the second largest for outbound travel (up 6,5 per cent per annum over the period 1995-2020) forcing the Americas (up 3,1 per cent p.a.) into third place. Africa, the Middle East and South Asia will each show above average growth rates (WTO 1999).

The future tourism picture in Africa

The Tourism 2020 Vision study forecasts a continued above global average rate of growth in international tourist arrivals in the African continent with an average annual rise between 1995 and 2020 of 5,5 per cent. By 2020, the volume of international tourist arrivals in Africa will reach 77 million, almost four times the 20 million recorded in 1995.

Analysis of sub-regional prospects shows that Southern Africa (at 7,5 per cent p.a. growth 1995-2020) will continue to be the leader, followed by Eastern Africa (5,2 per cent p.a.), though all sub-regions will share in the growth to a significant extent. By 2001 Southern Africa is said to reach 10 million arrivals, five times the level of 1990.

Intraregional travel within Africa will account for the largest number of arrivals in the region in 2020 (50 million) with Southern and Eastern Africa showing the strongest growth rates.

East Asia and the Pacific show the strongest growth of international tourist arrivals to the Africa region over the period 1995-2020 (6,8 per cent p.a.), albeit from a small base. The strongest growth will be from the Southeast Asian countries.

Arrivals from the Americas (5,1 per cent p.a.) will grow faster than those from Europe (4,4 per cent p.a.), but European arrivals will account for considerably more arrivals in the region (20 million in 2020). Growth in arrivals from Central/Eastern Europe and East Mediterranean Europe will be strongest.

Tourism's contribution to GDP in Southern Africa is expected to increase from 7,1 per cent in 1999 to 8,1 per cent in 2010. It is also projected that by 2010, 42 per cent of Southern Africa's business will be derived from international tourism, 33 per cent from intra-regional personal tourism and 10 per cent from intra-regional business.

The shape of tourism in the future

An analysis of the tourism literature indicates that tourism in the future will be increasingly flexible, segmented, customised and diagonally integrated rather than the mass, rigid, standardised and packaged that are still often experienced today. The following key mega trends will, according to all indications, dominate the shape and direction of tourism in the 21st century (adapted from WTO, 1999; Cooper *et al* 1999; Hall 2000):

- increased globalisation and localisation, forcing tourism stakeholders to "think globally, plan regionally and act locally";

- technology and telecommunications will permeate and dominate in virtually every sphere of the future tourism industry;

- major emphasis in the travel process will be placed on speed, efficiency, safety and convenience, being particularly dominant in the tourism transportation sphere;

- customers will increasingly "call the shots" through technology such as CD ROM atlases; Internet inspection of hotels and other facilities, brokers offering discounted rooms on Websites and last minute e-mail low fares;

- a polarization of tourism tastes will increasingly evolve (e.g. comfort-based versus adventure-orientated);

- globalisation in all its facets will result in a "shrinking tourism world" with increased emphasis on "off the beaten track places";

- targeted product market development (especially theme based) will be primarily orientated to one of the three E's - entertainment, excitement and education;

- destination image development, positioning and branding will become increasingly important in tourism marketing, as more destinations focus on "image" as a prerequisite to the diversification and expansion of drawing power;

- consumers will place increasing importance on sustainable tourism development and ethical business practices when deciding on tourism destinations and the tourism facilities they patronize;

- intensified conflict between the increased urge to travel and the consumers' socio-environmental consciousness can be expected to manifest itself at various levels in the industry.

The model that is postulated in this article, takes cognisance of these trends and strives to enable destinations to develop indicators and provide a base for strategically responding to the opportunities and challenges that these trends could create.

IMPLICATIONS OF ESCALATING GLOBAL COMPETITION TO DESTI - NATIONS IN AFRICA

Based on World Tourism Organisation figures (WTO 1998) over the 10 year period 1988 – 1997, global tourist receipts and arrivals grew at 9,8 and 5,4 per cent per annum, respectively. Of importance is the trend that growth rates display a general decline as the industry matures. So, for example, growth in receipts fell from an ave-

rage of 15,1 per cent over the first three years of this 10-year period to an average of 8,1 per cent per annum over the last three years of this period. Similarly arrival growth fell from 8,0 to 3,7 per cent per annum. Based on these trends it can be increasingly accepted that maturing growth rates will cause many destinations to increasingly covet the success of other destinations in securing a share of a market that is expanding more slowly. This reality could have major implications for destinations in Africa if they do not address their competitiveness in a proactive and innovative manner.

These average global growth rates mask regional differences. Table 1 indicates that although the arrivals to Africa have grown, the share of receipts for the region has fallen.

TABLE 1: Global tourism market share trends

Region	1975		1999	
	Arrivals%	Receipts%	Arrivals%	Receipts%
Europe	66.9	63.5	59.0	49.3
Americas	22.5	25.1	19.4	27.1
East Asia/Pacific	3.9	5.3	14.7	18.7
Africa	2.1	3.1	3.8	2.0
Middle East	1.6	2.1	2.4	1.9
South Asia	0.7	0.8	0.7	0.9

Source: WTO (1999)

It can be accepted that as total market growth continues to slow down, greater attention will be focused on destination competitiveness.

Further evidence of the intensification of competitiveness is found in the steadily rising budgets of National Tourism Organisations (WTO 1994). Consistent with the figures above, NTA budgets have risen most in the East Asia and Pacific, and the Middle East areas. The proportion of these budgets spent on destination competitiveness has also increased. Of significance is that developing countries have, in general, been placing greater emphasis on the NTAs given the relative significance of tourism to economic growth in these countries, and because they often lack powerful enterprises to promote inbound tourism sufficiently.

Intensifying competition is also evident in terms of the number of destination management organizations (DMOs) in existence. Apart from NTAs/NTOs, there has also been a growth in the number of state/provincial tourism offices and local and regional tourism bodies competing for a share of total tourism growth.

As indicated in Crouch *et al* (2000), anecdotal evidence indicates that more destinations

are adopting a strategic approach towards tourism development and marketing, involving visioning, a longer-term focus and an overall objective of sustainable development. It is significant that destinations that have adopted such an approach, recognize that competitiveness is illusionary without sustainability.

On a positive note, there are various factors that could contribute to enhancement of Africa's competitiveness during the first decades of the new millennium. These include:

- *Opportunities offered by electronic distribution channels:* Developing countries and new markets can be represented on an equal footing in the global market, using electronic distribution channels such as the Internet. It is becoming increasingly affordable and cost-effective to set up a web site that can be accessed by any computer linked to the global network.

- *The need for tour operators to offer new destinations (geographical diversification):* Developing countries can respond to the needs of the main generating markets by offering alternative destinations.

- *The need for tour operators to offer new products (product diversification):* Tourism demand is increasingly orientated towards new types of experiences, particularly cultural and environmental. New markets in developing countries often have a rich natural, cultural and historical heritage, which tour operators are promoting to cater to changing demand (Vellas & Becherel, 1999).

TOURISM AS A CATALYST FOR POVERTY ALLEVIATION IN AFRICA

The reduction of poverty is without a doubt one of the most compelling challenges facing Africa. A key question that needs to be asked regarding Africa is whether the potential power of the tourism industry can be effectively harnessed in the fight against poverty. Available evidence provides a positive answer.

According to De Villiers (2002) annual growth of tourist arrivals in LDCs over the last 10 years has been higher than the world average. Demonstrating the existence of a competitive advantage in their favour, the growth of international tourism receipts in LDCs was significant during the 1990s. LDCs receipts more than doubled between 1992 and 1998. Tourism has become the primary source of foreign exchange earnings in 49 LDCs. For many of these countries, tourism has become the major - or one of the major - contributors to their GDP.

Cross-country evidence demonstrates that tourism in LDCs is a labour-intensive activity offering small-scale opportunities. It, therefore, has the capacity to create jobs – jobs for the poor, jobs for women and young people, jobs in the indigenous communities,

unskilled as well as highly qualified jobs, jobs in seaside resorts as well as in remote rural areas and in ecotourism activities. The same cross-country evidence illustrates the major contribution that tourism generated foreign currency receipts can add to the balance of payments of most of these countries, reducing their external debt and avoiding the dependency of the single sector, or monoculture. Tourism receipts prove to be much more important to LDCs than the possible leakages they can generate. These facts provide a strong argument that tourism can play an important part in improving living standards and raising people above the poverty threshold (De Villiers, 2002).

Christie (2001) emphasizes that a focus on poverty does not imply a rejection of growth – if there is no growth, there is nothing to redistribute. Indeed, many of the studies comparing poverty reduction and growth conclude that the best policy is to grow out of poverty – growth leads to reduction in poverty. What causes concern however, is the quality and distribution of growth along with its composition. While the private sector is called upon to play a greater role, tourism will require public investment and of course sound public policy. Public/private partnerships are likely to become an even greater feature of tourism development. Tourism can often best be developed precisely in areas that lack development, i.e. often poor areas.

De Villiers (2002) argues that an effective national government strategy is essential if the maximum benefit from tourism is to be realised. He further suggests: "For too long tourism has been the responsibility of a ministry, or part of a ministry, in isolation from other parts of government with a major impact on the tourism sector. For too long International Aid Agencies have turned a blind eye to the economic development qualities of tourism, particularly its poverty alleviation potential in rural areas. Historically too little effort has been expended on maximising revenues and benefits to the local economy and to local communities" (De Villiers, 2002: 5).

A comprehensive study was undertaken by UK Department for International Development to compile its *Pro-Poor Tourism Program* (ODI 2000). The programme suggests that tourism has several advantages to address poverty, including:

- the tourist comes to the destination, thereby providing opportunities for selling additional goods and services

- tourism is an important opportunity to diversify local economies and can develop in poor and marginal areas with few other export and diversified options, remote areas particularly attract tourists because of their high cultural, wildlife and landscape value

- it offers labour intensive and small-scale opportunities compared with other non-agricultural activities; employs a high proportion of women; and values natural resources and culture, which may feature among the few assets belonging to the poor.

RATIONALE FOR ADOPTING AN INTEGRATED COMPETITIVENESS APPROACH TO TOURISM DESTINATIONS

From the preceding perspectives it is apparent that tourism can be a key catalyst to alleviate poverty in Africa and contribute to sustained growth, provided that the tourism sector becomes a strategic priority and is addressed in a sustainable and internationally competitive manner.

The rationale for developing a model of competitiveness that focuses specifically on the tourism sector is based on the nature of the tourism offering 'product', which from a desti-nation perspective can be regarded as "an amalgam of individual products and experience opportunities that combine to form a total experience of the area visited" (Murphy, Pritchard & Smith, 2000). Murphy *et al* (2000) conceive a destination product as consisting of a set of core benefits that are delivered through a tourism infrastructure that can be managed direct-ly; and by environmental factors - some of which may be influenced by public policy.

For a tourism destination perspective both comparative and competitive advantages should be considered when considering competitiveness. Comparative advantage relates to inherited or endowed resources such as climate, scenery, flora and fauna, while com-petitive advantage would relate to such created items as attractions, events, transport net-works, government policy, the quality of management and skills of workers. In the con-text of tourism, both comparative advantage and competitive advantage are important and a model of destination competitiveness must recognize this (Crouch & Ritchie, 1994).

On a practical level, destination competitiveness appears to be linked to the ability of a destination to deliver goods and services that perform better than other destinations on those aspects of the tourism experience considered to be important by tourists. A large number of variables are linked to the notion of destination 'competitiveness'. These include objectively measured variables such as visitor numbers, market share, tourist expenditure, employment, value added by the tourism industry, as well as subjectively measured variables such as 'richness of culture and heritage', 'quality of the tourism experience'. Thus, for example, competitiveness has been defined as *"… the ability of a destination to maintain its market position and share and/or to improve upon them through time"* (d'Hartserre, 2000).

Hassan (2000) describes competitiveness as *"the destination's ability to create and inte-grate value-added products that sustain its resources while maintaining market position relative to competitors".* He goes on to add an important perspective that, given the diversity of industries that need to be involved in making destinations become competi-tive, it is essential to look beyond rivalry among firms.

Crouch *et al* (2000) suggest that the most competitive destination is one that brings about the greatest success; that is, the most well-being for its residents on a sustainable basis.

They go further to warn that *"competitiveness is illusory without sustainability"*. To be competitive, a destination's development of tourism must be sustainable, not just economically and not just ecologically, but socially, culturally and politically as well. It can therefore be argued that the most competitive destination is the one that most effectively creates sustainable well-being for its residents.

Crouch *et al* (2000) argue that irrespective of the definition used, the notion of competitiveness seems to involve *"a combination of assets and processes, where assets are inherited (e.g. natural resources) or created (e.g. infrastructure) and processes transform assets to achieve economic gains from sales to customers"*. Dwyer (2001) goes further and postulates that the ultimate goal of competitiveness is to maintain and increase the real income of its citizens, usually reflected in the standard of living of the country. From this perspective, the competitiveness of a nation is not an end but a means to an end; its ultimate goal is to increase the standard of living of a nation under free and fair market conditions.

Key factors affecting destination competitiveness

From a destination competitiveness perspective it is important to appreciate that together with price factors there are a wide array of non-price factors that affect competitiveness that could have particular relevance to Africa, including:

- the political stability of a country or the surrounding region that will affect its attractiveness as a destination

- geographic proximity to high density and wealthy markets

- the policy environment of the destination (e.g. regarding open skies, visa requirements)

- the impact of events (e.g. the World Summit on Sustainable Development in South Africa and the 2002 World Soccer Cup in Seoul during 2001) which can have a significant short-term effect on visitor numbers as well as a longer-term promotional effect

- for long haul destinations - routings and seat availability

- natural and man-made attributes, which are often less easily quantifiable aspects of the tourism experience, such as the quality, uniqueness and range of tourism products, affect its appeal as a place to visit

- the effective marketing of the destination through advertising and promotional activities, as these are fundamental catalysts by virtue of the role they play in stimulating the overseas markets'awareness of, and interest in, traveling to a destination.

On a practical level, a report was released by the World Travel & Tourism Council during July 2002 (WTTC 2002), on the impact of travel and tourism on jobs and the economy in South Africa. It highlighted various weaknesses that were hindering the destination (and by implication many other destinations in Southern Africa) to achieve its true tourism and travel potential. The following perspective provided in the report, emphasizes the importance of an integrated and sustainable competitiveness approach to optimize the tourism potential of destinations in Southern Africa and beyond: "The main problem seems to be that, although significant progress has been made in assembling the nuts and bolts of South Africa's Travel & Tourism business, the strategic vision and leadership necessary to bring all the pieces together has not yet materialized. Poor implementation has compounded the situation and, as a result, South Africa's Travel & Tourism has not yet met earlier promises to generate employment at the speed of light, or extend development opportunities to the farthest reaches of the nation".

DEVELOPMENT OF AN INTEGRATED AND DYNAMIC MODEL OF DESTINATION COMPETITIVENESS

From an Africa perspective, the current models of destination competitiveness proposed by, among others, Kim (2000), Crouch *et al* (2000) and Dwyer (2001) do not appear to be entirely relevant. The key reasons being that they do not appear to adequately provide an integrated treatment of the various issues surrounding the concept of 'competitiveness' and do not place sufficient emphasis on the key success drivers (people) and the vital linkages (e.g. communication and information management) that need to be considered when developing a comprehensive framework of *sustainable* destination competitiveness.

The model that has been developed, as outlined in Figure 1, brings together the main elements of destination competitiveness as proposed in the wider literature and the main indicators of destination competitiveness as proposed by various tourism researchers such as Crouch *et al* (2000), Kim (2000) and Dwyer 2001).

The model, which is presented in the form of a house, comprises various key facets: the foundations that provide an essential base for competitiveness; the cement, which binds and links the respective facets of competitiveness; the building blocks, that are essential to make tourism *happen* in a destination; and the roof (the key success drivers), which comprises the *people* part of destination competitiveness. These facets are placed into perspective in the following sections.

The competitiveness foundations

An analysis of leading "best practice" destinations and the literature indicate particular key foundation elements that are fundamental to sustained competitiveness. These ele-

ments will be referred to as the key attractors, the non-negotiables, the enablers, the value-adders, the facilitators and the experience enhancers. They in turn comprise various facets, which are outlined below:

Providing and managing the key attractors

The key attractors represent the fundamental reasons why prospective visitors choose one destination above another and can be divided into two broad types, namely inherited (endowed) attractors and created attractors.

- Inherited attractors

    The inherited attractors can be divided into natural attractors (e.g. climate, flora and fauna) and cultural and heritage attractors.

    The natural attractors of a destination define the environmental framework within which the visitor enjoys the destination. They include e.g. physiography, climate, flora and fauna, which are crucial for many forms of tourism and visitor satisfaction (Buckley, 1994).

    The culture and heritage attractors of a destination refers to its history, institutions, customs, architectural features, cuisine, traditions, artwork, music, handicrafts and dance; providing a basic and powerful attracting force for the prospective visitor (Prentice, 1993, Murphy *et al* 2000).
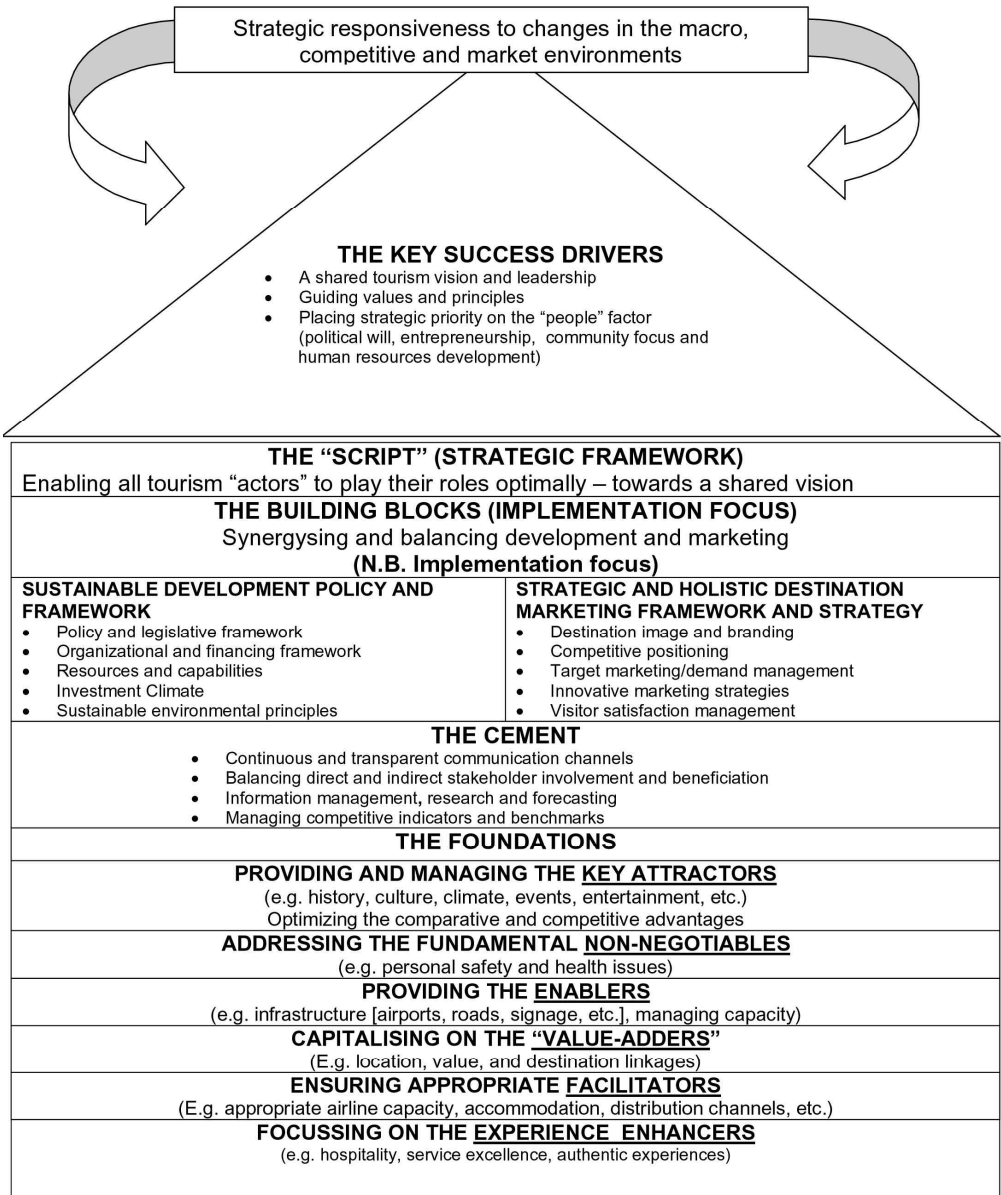
- Created Attractors

    From the literature it is apparent that *created attractors* are important in determining destination competitiveness. On a practical level there are at least four types of *created attractors* that influence destination competitiveness, including events, the range of available activities, entertainment and shopping.

    An important perspective provided by Crouch *et al* (2000) regarding the key attractors is that the more diversified a destination's portfolio of tourism attractors, services and experiences is, the greater its attractiveness and therefore competitiveness will be. Moreover, a destination's seasonal constraints may be partly overcome when the available range of seasonal experiences is extended.

    Of particular importance in the African context is the perspective provided by Hassan (2000), which indicates that major world-class destinations are increasingly diversi-

Figure 1: Towards a model for enhancing Africa's sustainable tourism competitiveness

Strategic responsiveness to changes in the macro, competitive and market environments

THE KEY SUCCESS DRIVERS
- A shared tourism vision and leadership
- Guiding values and principles
- Placing strategic priority on the "people" factor (political will, entrepreneurship, community focus and human resources development)

THE "SCRIPT" (STRATEGIC FRAMEWORK)
Enabling all tourism "actors" to play their roles optimally – towards a shared vision

THE BUILDING BLOCKS (IMPLEMENTATION FOCUS)
Synergysing and balancing development and marketing
(N.B. Implementation focus)

SUSTAINABLE DEVELOPMENT POLICY AND FRAMEWORK	STRATEGIC AND HOLISTIC DESTINATION MARKETING FRAMEWORK AND STRATEGY
- Policy and legislative framework - Organizational and financing framework - Resources and capabilities - Investment Climate - Sustainable environmental principles	- Destination image and branding - Competitive positioning - Target marketing/demand management - Innovative marketing strategies - Visitor satisfaction management

THE CEMENT
- Continuous and transparent communication channels
- Balancing direct and indirect stakeholder involvement and beneficiation
- Information management, research and forecasting
- Managing competitive indicators and benchmarks

THE FOUNDATIONS

PROVIDING AND MANAGING THE KEY ATTRACTORS
(e.g. history, culture, climate, events, entertainment, etc.)
Optimizing the comparative and competitive advantages

ADDRESSING THE FUNDAMENTAL NON-NEGOTIABLES
(e.g. personal safety and health issues)

PROVIDING THE ENABLERS
(e.g. infrastructure [airports, roads, signage, etc.], managing capacity)

CAPITALISING ON THE "VALUE-ADDERS"
(E.g. location, value, and destination linkages)

ENSURING APPROPRIATE FACILITATORS
(E.g. appropriate airline capacity, accommodation, distribution channels, etc.)

FOCUSSING ON THE EXPERIENCE ENHANCERS
(e.g. hospitality, service excellence, authentic experiences)

Source: Author's own construction

fying their attractions and experience offerings to attract environmentally orientated tourist segments in order to remain competitive. These segments, for which Africa has major comparative and competitive strengths, are growing at a high rate. For example, interest in ecotourism experiences is growing by 25% to 30% per year and cultural tourism at 10% to 15% per year, compared to an overall average of 4% to 5% for the industry in general (WTO 1999).

Addressing the fundamental non-negotiables

It is increasingly accepted that safety, security and health facilities within a destination can be critical qualifying determinants of its competitiveness. Elements include: political instability/unrest, probability of terrorism, crime rates, record of transportation safety, corruption of police/administrative services, quality of sanitation, prevalence of outbreak of disease, quality/unreliability of medical services and availability of medication. The current world crisis in tourism – as a direct result of terrorist strikes in the USA- is affecting both the volume and pattern of tourism flows throughout the world (Dwyer, 2001).

In its 2020 Vision, the WTO (1999:30) summarizes the strategic importance of issues pertaining to tourist safety and health in destinations in the future as follows:

- The safety of air traffic control systems is certain to play a major part in overall air travel safety in the coming years. With the large growth in air travel, many air traffic control systems, even in the US, are struggling to cope.

- Tourism will not flourish in destinations in civil turmoil, at war, or where tourists' health or security is perceived to be under threat. Tourist kidnappings appear to be on the increase with incidents worldwide doubling in the last five years. Terrorist groups are becoming more aware that killing or holding tourists to ransom makes good news.

- The importance of health within countries and resorts has recently been highlighted by the withdrawal of many tour operators from the destinations, where many hotels were declared 'unclean' after several tourists were taken ill. Outbreaks of disease have a temporary impact on tourists travelling to worldwide destinations, but a longer-term damage to tourism would be caused if a disease was actually transmitted from its origin around the world through air travel.

Providing the enablers

Whereas the key attractors of a destination constitute the primary motivations for inbound tourism, the enablers provide a firm foundation upon which a successful tourism industry can be established. These include general infrastructure such as road

networks, airports, train systems, bus systems, water supply, telecommunication, sewerage, health care facilities, sanitation, the electricity generation system, financial services and computer services.

The accessibility of the destination, which is of vital importance to facilitate the tourism movement, is determined by a variety of influences including the frequency, ease and quality of air, sea, land access, aviation regulations, entry permits, visa requirements, route concessions and airport capacities, and competition among carriers. (Dwyer 2001). On a decision-making level tourist choices between alternative destinations are often influenced by inefficiencies in the transport system such as uncompetitive practices, safety concerns, comfort levels and journey time (Prideaux, 2000).

Capitalising on the value-adders

There are various *value-adders* that can contribute significantly to the competitiveness of a destination, such as value and price competitiveness, proximity to key markets and strategic destination linkages. Providing value for money is increasingly regarded as one of the key challenges facing any tourism destination as is the perception of value (Buhalis, 2000). A destination's location, particularly relative to major source markets can have a major impact on its ability to attract visitors. McKercher (1998) observes that more proximate destinations exhibit a competitive advantage over destinations that offer a similar product, but are more distant.

Of particular relevance in the African context is capitalizing on linkages with people in origin markets in order to enhance destination competitiveness. These include ethnic ties underlying VFR travel; business ties and trade links underlying business tourism; economic and social ties including ongoing trade relationships; membership in professional and trade associations, historical and recent immigration flows; and common culture, language and religion (Dwyer, 2001).

Ensuring appropriate facilitators

Murphy *et al* (2000) found that the level or lack of appropriate facilitators (which they term infrastructure) affect tourist experiences and that the availability of appropriate facilitators (e.g. airlines, accommodation and distribution channels), is an important predictor of both destination 'quality' and perceived trip 'value'.

The 'facilitator' foundation comprises, among others, transport facilities, food services and receptive tourism plant, tour wholesalers, tour operators, travel agents, car rental firms, local convention centres and visitor bureaus. Tourism also relies on the provision of numerous ancillary services. Related services infrastructure include: retail shopping

facilities, food stores, garages/car maintenance, petrol stations, pharmacies, bookstores, laundries and policing services. Destinations function more effectively when these services are abundant (Dwyer 2001).

Focusing on the experience enhancers

It is increasingly accepted that the actual tourism experience can be considerably enhanced through destination authenticity and excellence in hospitality and services offered, is a vital element of sustained destination competitiveness.

In the destination context, hospitality relates to the perceived friendliness of the local population and attitude towards tourists (Dwyer 2001). It includes: warmth of reception by local population; ease of communication; willingness of residents to provide information to tourists; attitudes towards tourists and tourism industry. Tourist guidance and information, including good signage, is important to visitors feeling 'valued'by residents of a destination. Destination Marketing Organisation (DMO) managers increasingly regard the hospitality factor as important from a strategic perspective as it is vital to ensure positive visitor experiences (Heath, 2000).

Together with hospitality the service excellence dimension of the tourism experience is vital. Provision of reliable and responsive visitor services enhances a destination's competitive advantage. Initiatives to enhance the quality of the experience provided by a tourism destination include: establishment of standards for tourism facilities and performance of personnel; programmes to objectively and subjectively monitor the quality of experiences provided; monitoring of resident attitudes towards visitors and towards development of the tourism sector. Go and Govers (2000) emphasize that to enhance tourist experiences a concerted effort must be made to ensure quality of service and to take a total quality of service approach to visitor satisfaction. They further stress that a commitment to quality by every enterprise in a destination (public or private) is necessary to achieve and maintain international competitiveness.

Key success drivers

From the destination plans and strategies analysed it is apparent that the key success drivers in a destination's competitiveness mainly centre around the establishment of a shared vision and inspirational leadership; clear guiding values and principles, and strategic emphasis being placed on the 'people' factor (e.g. political will, entrepreneurship, community empowerment and human resources development).

A shared vision and inspirational leadership.

The importance of powerful visioning is of such a nature that it can be regarded as a major driver of destination competitiveness. Visioning is designed to develop a shared picture among all stakeholders of an 'ideal future state'for the destination (the way stakeholders envisage the destination at some loosely defined point in time in the future). A key challenge is to formulate a shared vision through a publicly driven process, based on stakeholder values and consensus. Of vital importance for a vision statement to be meaningful is that it provides a meaningful and operational 'dream'for the future of the destination – one that reflects the values and aspirations of the stakeholders - while not ignoring the constraints and realities of the marketplace. A key challenge facing every destination is to ensure that the vision is of such a nature that it provides a base for creating an operational strategic development plan for the destination. On a practical level every element of the vision statement must eventually be translated into reality if the vision is to be meaningful. Examples of destination visioning statements are provided in Ritchie (1999) and Heath (2000).

The following extract from the African Dream Website (Open Africa, 2000) provides some perspectives on a tourism vision for Africa:

> *"Indulge in some imaginary scenario building and redefine 'game parks' to include areas reflecting the traditions, culture, arts, literature, archeological sites and folklore of Africa; imagine these linked from Cape Town to Cairo, such parks to serve as the cornerstones of an African paradigm and modality of living that harmonises with nature; pencil in accommodation and new forms of craft and industries along these links and on the borders of these parks, with informal markets employing hundreds of thousands of people; agriculture based on farming with wildlife; music, clothing, art, and theoretical export with nature as its theme; education with an emphasis on environmental management; new forms of architecture based on the old".*

Given global tourism trends and the tourism potential that can be harnessed in Africa the vision of the Open Africa Initiative, namely: "To turn the unique splendour of Southern Africa (and Africa at large) into one of the most valuable products on earth" is certainly achievable.

On a practical level Crouch *et al* (2000) emphasize that the destination 'vision'provides a direction for development. They also stress the importance of vision emanating from a publicly driven process based on stakeholder values and consensus rather than through a more private 'expert-driven'process based solely on market forces.

Promoting an entrepreneurial and innovative spirit and culture

The health, vitality and sense of enterprise, entrepreneurship, new venture development and innovation within a destination can contribute to its competitiveness in a variety of ways. Gilbert (1990), Poon (1993) and Porter (1990) all emphasise how 'value-competitive advantages' can be achieved. Crouch *et al* (2000) reason that a destination can enhance its competitiveness through specialization, innovation, investment, risk taking, and productivity improvements. To this list one could add the formation of strategic alliances.

In the dynamically changing environment, a competitive destination is aided by the development of innovative tourism services and experiences. Destination tourism stakeholders must continue to seek out and implement new technologies to improve their productivity. New ventures and small businesses provide an ideal mechanism for the identification and development of new ideas. Poon (1993) argues that "flexible specialization" or "permanent innovative and ceaseless change provides for the demands of 'new tourism'".

Placing strategic priority on human resources development is increasingly regarded as critical in destination competitiveness. Bueno (1999) argues that since competition between destinations is determined by skills, human resources is a central factor in achieving competitiveness because of the new opportunities brought about by new technologies and the importance of consumer loyalty in maintaining high demand.

Particularly in the African context the ability to succeed, and the future performance of tourism and related activities will depend largely upon the skills, qualities and knowledge that managers will be able to bring to their business. This will place increasing pressure on educators and trainers to play a larger role in facilitation, innovation, and encouraging empowerment, motivating the workforce and, in partnership with industry, working to overcome the specific problems of tourism (Heath, 2000).

Ensuring an appropriate 'script' (strategic framework)

Every destination comprise many public and private sector 'actors' all who have the potential to add value to the overall competitiveness of the destination. In practice, however, a 'script'(strategic framework) is required to outline their respective roles as well as the opportunities that exist for them to play their roles and to achieve their specific goals and objectives within a shared vision and marketing framework for the destination. A key challenge is to ensure that all key role-players understand the bigger picture of destination marketing; the roles of their fellow *actors* and their specific roles relative to the other *actors.* By adopting an approach of this nature, however basic and practical, can play a key role in establishing a shared vision, harnessing resources, avoiding duplication and creating seamlessness in destination development and marketing and ultimately sustained destination competitiveness (Heath, 2000).

Key building blocks (with an implementation focus)

The two interconnected key building blocks of sustained destination competitiveness entail an integrated development policy and framework and a strategic and innovative destination marketing framework and strategy – with a strong implementation focus.

Ensuring a sustainable development policy and framework

Destination development (primarily supply side decisions) is the outcome of strategic decisions regarding the deployment of resources – in effect supply side decisions. These involve product development strategies that will ensure the delivery of the high quality experiences promised to potential visitors. These include the creation of landmarks and symbols that capture the spirit of the destination; strategic financial decisions concerning the nature and sources of the funding required for this development; a broad range of strategic human resource decisions; and, finally, strategic decisions regarding the type of organizational structure that will most effectively guide and co-ordinate the ongoing processes of destination development, management and operation (Hassan, 2000).

To provide strategic and responsible direction to the overall development process a clear policy is required, which can be defined as "a clear set of regulations, guidelines, directives, and development/promotion objectives and strategies that provide a framework within which the collective and individual decisions directly affecting tourism development and the daily activities within a destination are taken" (Crouch *et al* 2000). Tourism policy should ideally seek to create an enabling environment within which tourism can flourish in an adaptive and sustainable manner.

Ensuring an appropriate and dynamic organizational structure to facilitate and manage the destination tourism process is a vital element of destination competitiveness. On a practical level various areas and levels of government should be involved in the promotion, regulation, presentation, planning, monitoring, maintenance, coordination, enhancement and organization of tourism resources (Buhalis, 2000).

The primary function of the *Destination Management Organization* (DMO) should be to serve as a coordinating body for the various public and private sector organizations involved in tourism. In some cases the DMO will also provide the leadership necessary to provide overall direction for tourism development within the destination. In all cases the challenge is to ensure that the parts of the tourism sector work together and thus compete more effectively.

Two key rules of thumb regarding destination organization is that "structure should follow strategy" and "the best organizational structure is the simplest one to get the job done" (Heath, 2000).

Managing resources and capabilities

A key aspect of any destination planning process is to access both the adequacy and effectiveness of the attractors, the infrastructure and facilities, the services, and the pro-grammes that together provide valued 'destination experiences' for the visitor. The audit or inventory of resources is required before they can be deployed appropriately. Crouch *et al* (2000) argue that it involves more than just a cataloguing and listing of resources. It also requires an understanding of the capacity of resources, including limitations and implications of their use.

Ensuring a healthy investment climate

An essential ingredient of longer-term competitiveness is a healthy investment climate. The flow of investment capital (both debt and equity) to the tourism industry is possible largely through the efforts and existence of tourism enterprises seeking to exploit prof-itable opportunities. A destination's diversified portfolio of tourism products, services and experiences enhance its attractiveness and therefore competitiveness. Investment in new products and services may also help to overcome seasonality constraints (Hassan, 2000).

Adhering to sustainable environmental principles

It is increasingly recognized and accepted that resources must be maintained and man-aged in an appropriate way to guard against undue deterioration and to facilitate their sustainability. As Hassan (2000) notes "sustainable development is critical to the conser-vation of nature and the preservation of indigenous culture". According to Hassan it is critical for future destination development plans to be compatible with environmental integrity in order for the tourism industry to maintain its economic viability. All tourism stakeholders have an important role to play here. This point is reinforced in a World Travel and Tourism Council report that states that "sustainable travel and tourism devel-opment relies upon policies which support harmonious relationships among travelers, local communities, the private sector and governments to balance natural, built and cul-tural environments with economic growth and stability" (WTTC 2001).

Mihalic (2000) claims that a destination's attractiveness (appeal) and its competitiveness can be increased by proper management of the environmental quality of a destination. She reasons that destination competitiveness can be enhanced through such initiatives as codes of conduct, self developed environmental practices, certified or award best practice and accreditation schemes; and that maintaining a high level of overall envi-ronmental quality is important for the competitiveness of most types of tourism destina-tions and thus a primary concern for destination managers.

Ensuring a strategic and integrated destination marketing framework and strategy

Traditionally there has generally been a fragmented and myopic approach to destination marketing, with insufficient co-ordination between public and private sector stakeholders and even less co-ordination between inbound and outbound tourism stakeholders. Furthermore, a strategic, information-based and systems approach to destination marketing has also been lacking in many instances with the emphasis mainly being on the development and implementation of generic marketing campaigns targeted at broad-based target markets (Heath, 2000).

An analysis of more than fifty international destination marketing plans and strategies indicate that destination marketing is becoming increasingly strategic and participative (Heath, 2000). Hassan (2000) argues that, to maintain destination competitiveness, destination management should focus on a systematic examination of unique comparative advantages that provide a special long-term appeal to the target travel customer segments. He claims "destinations are winning competitive battles by careful analysis and response to the core values and needs of the segmented marketplace".

Enhancing the appeal of a destination involves a program of marketing efforts designed to influence the decision process of prospective visitors. These efforts may focus on increasing awareness of the existence of the destination or improving the perceptions of the qualities of the destination to different market segments. Relevant activities include: creation of high level destination awareness; development of strong destination image; selection of appropriate market segments; development of strong links with tourism wholesalers and retailers and development of attractive and flexible tour packages (Dwyer, 2001).

Destination image, branding and competitive positioning

An important function of destination marketing managers is to create a destination image, that is "the sum of beliefs, ideas and impressions that people have of a place" (Kotler, 1997). On a practical level a destination's 'image' or 'flavour' is a major consideration in destination choice and destination competitiveness. Branding identities and strategies vary considerably between destinations. For example, France or Britain have a perceived character, image or flavour that is familiar to most people. On the other hand a destination such as South Africa has a less distinctive character/image (possibly blurred by many factors e.g. the dynamic transformation process and concern about tourist safety). Particular emphasis must therefore be placed on developing and promoting the particular character/image of the destination to compete effectively in the international marketplace. A key trend that is emerging is that of creating sub-brandings from the province/state to the local level, that "seamlessly" fit into the national branding framework (Heath, 2000).

Destination positioning, which is increasingly regarded as important for competitiveness, relates to the perceptions of current and potential visitors of the destination relative to competing destinations. A key challenge facing destination marketers is to decide on a specific competitive positioning strategy and then to use it as a base for strategy implementation and resource deployment. In this regard an understanding of competitors is obvious (Heath, 2000).

Demand management and target marketing

The nature of demand for a destination's tourism offerings is regarded as having an important influence on destination competitiveness. Dwyer (2001) argues that demand conditions, particularly domestic demand and its internationalisation to foreign markets, establish the *proving grounds* for the industry. A high domestic demand confers static efficiencies and encourages improvement and innovation. Crouch and Ritchie (1993) have a similar view and emphasize that it is domestic tourism that drives the nature and structure of a nation's tourism industry. Furthermore, foreign demand thrives more readily when domestic demand is well established.

Changes in lifestyles, values and behaviour are key driving forces in shaping the future direction of tourism marketing. Increasingly, tourists are more knowledgeable, experienced, environmentally aware, independent, discerning, more quality and value for money conscious and considerably better informed.

On a practical level tourists are increasingly

- looking for unique experiences leading to personal fulfilment
- more interested in 'special interest'rather than 'sight seeing' trips
- traveling individually rather than in groups
- wanting to experience the local culture and interact with the locals
- environmentally conscious
- less inclined to spend their money on luxury, but rather more on enrichment and articles with (added) value and
- influenced by multi-media.

Tourists are increasingly looking for adventure, cultural enrichment and nature-based experiences, with personal safety and security being fundamental prerequisites. The general trend is away from products to experiences and from relaxation to recharging (Heath, 2000).

In its *Tourism 2020 Vision*, the WTO (1999) identifies five key market segments that are growing in importance, namely ecotourism, cultural tourism, thematic tourism, the

cruise market and adventure tourism – all areas in which Africa has a wealth of potential, although still mostly untapped.

Finer market segmentation (e.g. lifestyle segmentation) and target marketing is increasingly being practiced by most successful destinations. This is increasingly being regarded as fundamental to achieving a focused and cost effective marketing strategy, which offers the greatest possible returns in terms of incremental business (Heath, 2000).

Competitiveness 'cement'

It is increasingly apparent that the most sound foundations and appropriate building blocks will not optimally contribute to destination competitiveness if the appropriate cement is not in place. These include continuous and transparent communication channels with all stakeholders; balancing stakeholder interests (e.g. members of the travel trade, residents, employees, citizen groups, media, financial institutions and government departments); managing information and research as a base for sound decision-making; and ensuring appropriate competitiveness indicators and benchmarks.

Arguably one of the key cement elements in enhancing destination competitiveness is the forging of strategic destination stakeholder partnerships. Many successful tourism destinations such as Canada, Australia, Singapore and the Netherlands are increasingly focusing on strategic public-private sector partnerships in destination marketing. It is increasingly appreciated that a strong spirit of partnership and collaboration is required amongst all stakeholders to realise the potential of a destination, to maximize available resources, to create a synergistic marketing thrust, and to enhance competitiveness. Go *et al* (1999) claim "partnerships, including private and public sector collaboration between destinations, is a prerequisite to maintaining destination competitiveness". Buhalis (2000) states that "partnerships between public and private sector and close co-operation between all local suppliers is the key to the ability of destinations to offer quality products".

Information management, research and forecasting

Destinations that gather and use information effectively can improve their competitive position. An effective use of information systems can provide managers with the information required for understanding visitor needs, and for effective product development and marketing by tourism organizations in both the private and public sectors.

Two categories of information are important. *First*, information that is internal to the destination. It provides an ability to better manage the performance of the destination's product. The better the system of information management, the greater the ability of firms in a destination to manage different aspects of the destination product. *Second*, market

research results. This enables a destination to adapt to changing market conditions through its marketing strategy. e.g. visitor statistics on patterns of tourist behaviour, performance measures that identify problems, tourist satisfaction studies which identify challenges and opportunities; economic, social and environmental impacts of tourism development, information that monitors and tracks the attitude of the local population toward the tourism. Such information can enhance the ability of tourism stakeholders to forecast demand to aid long term planning (Dwyer, 2001).

Managing competitive indicators and benchmarks

Possibly one of the most important, yet neglected elements of destination marketing is that of implementing an effective and practical process of developing and monitoring competitiveness indicators and benchmarks. Indicators that need to be benchmarked and monitored include:

• tourism demand: described by a total amount, which is to be presented after measuring the effect on final demand by tourism activities

• tourism employment: referring to employment created with in the tourism sector, including the overall rate that tourism employment occupies within the industry, labor productivity in the tourism sector, and annual real growth rates of employment in the tourism sector

• tourism performance: meaning indicators resulting from tourism (i.e. growth rates, number of overseas entrants, growth rate of overseas visitors, balance of tourism payments, GDP rate in the tourism sector, average length of stay, and rate of revisit)

• tourism export: including expenditure by overseas visitors, expenditure per each overseas visitor and the rate of tourism export in the overall industry (Dwyer, 2001).

Strategic responsiveness to changes in the macro, competitive and market environments

As part of the on-going strategic management of destinations, a regular audit needs to be undertaken of key developments and trends in the macro, competitive and market environments as well as an analysis of a destination's resources, capabilities, and the current functioning of its tourism operations. The fundamental goal is to access both the adequacy and effectiveness of the tourism offerings, facilities, the services and the programs and where appropriate, to realign these in response to changes in the macro, competitive and market environments.

CONCLUDING COMMENTS

A new era is dawning for tourism in Africa. An era which will not only be dominated by the impact of technology and the intensification of competition in the tourism arena, but also by the realisation among tourism stakeholders that there are major benefits in co-operation and co-ordination of efforts. The traditional approach to operate within political boundaries (*tourists do not appreciate political boundaries - rather they are concerned with quality experiences across political boundaries*) or within "boxes" (*e.g. my hotel box, my airline box, my public sector box or our destination box*) will be replaced with strong partnerships and strategic alliances among stakeholders and destinations across the spectrum to jointly address issues of common interest and mutual benefit and to work together to enhance overall destination competitiveness as was articulated in this article.

In a recent World Bank report, the question was posed whether Africa can claim the Twenty First Century? According to Christie (2002) the answer must be a certain yes, if Africa can adopt self-reinforcing processes of economic, political and social development and in particular: improve governance and reduce conflict; invest in people; increase competitiveness and diversify; reduce aid dependence and build partnerships. Tourism is one way in which Africa can achieve these goals and as yet, it has barely scratched the surface of its tourism potential.

From an Africa perspective appropriate tourism development could become the engine of growth that can improve the quality of life of millions. The continent has the tourism resources, and the market potential certainly exists. Possibly the biggest constraint facing Africa in terms of achieving its true tourism potential lies with the people of the continent. Africans need to:

- really appreciate true tourism potential
- develop a shared tourism vision
- co-ordinate efforts in addressing the strategic tourism challenges in the region
- invest adequately in appropriate tourism development and marketing and
- strategically manage the key elements that constitute destination competitiveness as outlined in this article.

If this is done Africa could enter the first decades of this millennium with a new sense of pride and economic well-being, knowing that it is building part of the economic future on a sustainable resource base in which our sub-continent has a global competitive advantage.

In conclusion the words of Arther Costa, author of Creating the Future, are very relevant: "The best way to predict the future is to invent it now!" and in the words of the Poet: "Man's reach must exceed his grasp or what is heaven for?".

BIBLIOGRAPHY

Bueno, A. 1999. Competitiveness in the Tourist Industry and the Role of the Spanish Public Administration Turizam. *Special Issue on Competitiveness in Tourism and Hospitality* Vol. 47 No. 4:316-331.

Buckley, R. 1994. A Framework for Ecotourism. *Annals of Tourism research*, 21 (3): 661-669.

Buhalis, D. 2000. Marketing the Competitive Destination in the Future. *Tourism Management,* Vol 21, Number 1: 97-116.

Christie, I. 2002. *Tourism Growth and Equity.* Peace and Sustainable Development though Tourism Conference. Nelspruit, South Africa, July 3 – 7.

Cooper, C., Fletcher, J., Gilbert, D. & Wanhill, S. 1999. *Tourism principles and practices.* Second Edition. New York:Longman.

Crouch, G. and J.B.R. Ritchie. 1994. *Destination Competitiveness: Exploring Foundations for a Long-Term Research program.* Proceedings of the Administrative Sciences Association of Canada Annual Conference, Halifax, Nova Scotia, June 25-28, 1994: 79-88.

Crouch, G. and J.B.R. Ritchie. 1995. *Destination Competitiveness and the Role of the Tourism Enterprise.* Proceedings of the Fourth Annual Business Congress, Istanbul, Turkey, July 13-16: 43-48.

Crouch, G. I., & Ritchie, J. R. Brent. 1999. Tourism, Competitiveness, and Societal Prosperity. *Journal of Business Research* 44: 137-152.

De Villiers, D. 2002. *Rural and community-based tourism.* Peace and Sustainable Development though Tourism Conference. Nelspruit, South Africa, July 3 – 7.

d'Harteserre, A. 2000. Lessons in Managerial Destination Competitiveness in the case of Foxwoods Casino Resort, *Tourism Management*, Vol 21, Number 1: 23-32.

Dwyer, L. 2001. Destination Competitiveness: Determinants and Indicators. Unpulished Report.

Gilbert, D. 1990. Strategic Marketing Planning for Tourism. *The Tourist Review* , 18-27.

Go, F. and R. Govers. 2000. Integrated Quality Management for Tourist Destinations: a European Perspective on Achieving Competitiveness, *Tourism Management* Vol 21, Number 1: 79-88.

Hall, M. 2000. The Future of Tourism: A Personal Speculation. *Tourism Recreation Research*, Vol. 25(1): 85-95.

Hassan, S. 2000. Determinants of Market Competitiveness in an Environmentally Sustainable Tourism Industry. *Journal of Travel Research*, vol. 38, (3):, 239-245.

Heath, E. 2000. Key Trends in Destination Marketing: Lessons from Global "Best Practice" Destinations, in: Ruddy J. and Flanagan S. (Ed.), *Tourism Destinations: Gaining the Competitive Edge*, Tourism Research Centre, Dublin Institute of Technology.

Kotler, P. 1997. *Marketing management: analysis, planning, implementation and control.* New Jersey. Prentice-Hall.

McKercher, B. 1998. The Effect of market Access on Destination Choice, *Journal of Travel Research*, 37: 39-47.

Mihalic, T. 2000. Environmental Management of a Tourist destination. A Factor of Tourism Competitiveness, *Tourism Management*, Vol 21, Number 1: 65-78.

Murphy, P., Pritchard, M. and B. Smith. 2000. The Destination Product and its Impact on Traveller Perceptions, *Tourism Management.,* Vol 21, Number 1: 43-52.

Naisbitt, J. 1994. *Global Paradox*. Warner Books: New York.

Open Africa. 2002. *Open Africa and the 'African Dream' Project.* Unpublished Report.

Poon, A. 1993. *Tourism, Technology, and Competitive Strategy*, CAB International, Walingford, UK.

Porter, Michael E. 1990. *The Competitive Advantage of Nations.* The Free Press: New York.

Prentice, R. 1993. Heritage Consumers in the Leisure Market: an application of the Manning-Haas demand hierarchy, *Leisure Sciences*: 273-290.

Prideaux, B. 2000. The Role of the Transport System in Destination Development, *Tourism Management,* Vol 21, Number 1: 53-64.

Ritchie, J.R., & Crouch, G.I. 1993. *Competitiveness in international tourism : A framework for understanding and analysis.* Proceedings of the 43rd congress of association internationale d'experts scientifique de tourisme. San Carlos de Bariloche, Argentina, October 17-23.

Ritchie, J.R. and Crouch, G. I. 2000. The competitive destination: A sustainability perspective. *Tourism Management* 21(1): 1-7.

Vellas, F.A. & Becherel, L. 1999. *The International Marketing of Travel and Tourism: A Strategic Approach.* Macmillan Press: London.

WTTC 1996. *Progress and Priorities 1996.* WTTC: London.

WTTC 2000. *Travel & Tourism's Economic Impact: 2000/2005.* WTTC: London, UK.

WTTC 2001. *Competitiveness Monitor.* World Travel and Tourism Council, London.

WTTC 2002. *South Africa: The Impact of Travel & Tourism on Jobs and the Economy.* London.

WTO 1996. *Tourism Highlights.* Madrid: WTO.

WTO 1998. *Governments' role in tourism.* WTO News, September/October.

World Tourism Organisation 1999 *Tourism 2020 Vision.* Madrid: WTO.