

CHAPTER 11

SUMMARY AND RECOMMENDATIONS

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CHAPTER 11

SUMMARY AND RECOMMENDATIONS

11.1 INTRODUCTION

This chapter will provide an overview of the conclusions of the study in relation to its objectives. Recommendations based on these conclusions will be proposed that could result in improved strategic decision-making for South Africa as a tourism destination.

This chapter also proposes a destination competitiveness model that can contribute to tourism management science in general and particularly to the enhancement of the competitiveness of destinations. Suggestions will finally be made for future research that can contribute to the competitiveness of South Africa and other international tourism destinations.

11.2 OBJECTIVES OF THE STUDY

The main objective of this study was to develop a strategic model that can be used to identify and integrate the critical success factors of an international tourism destination and to apply this model in a South African context.

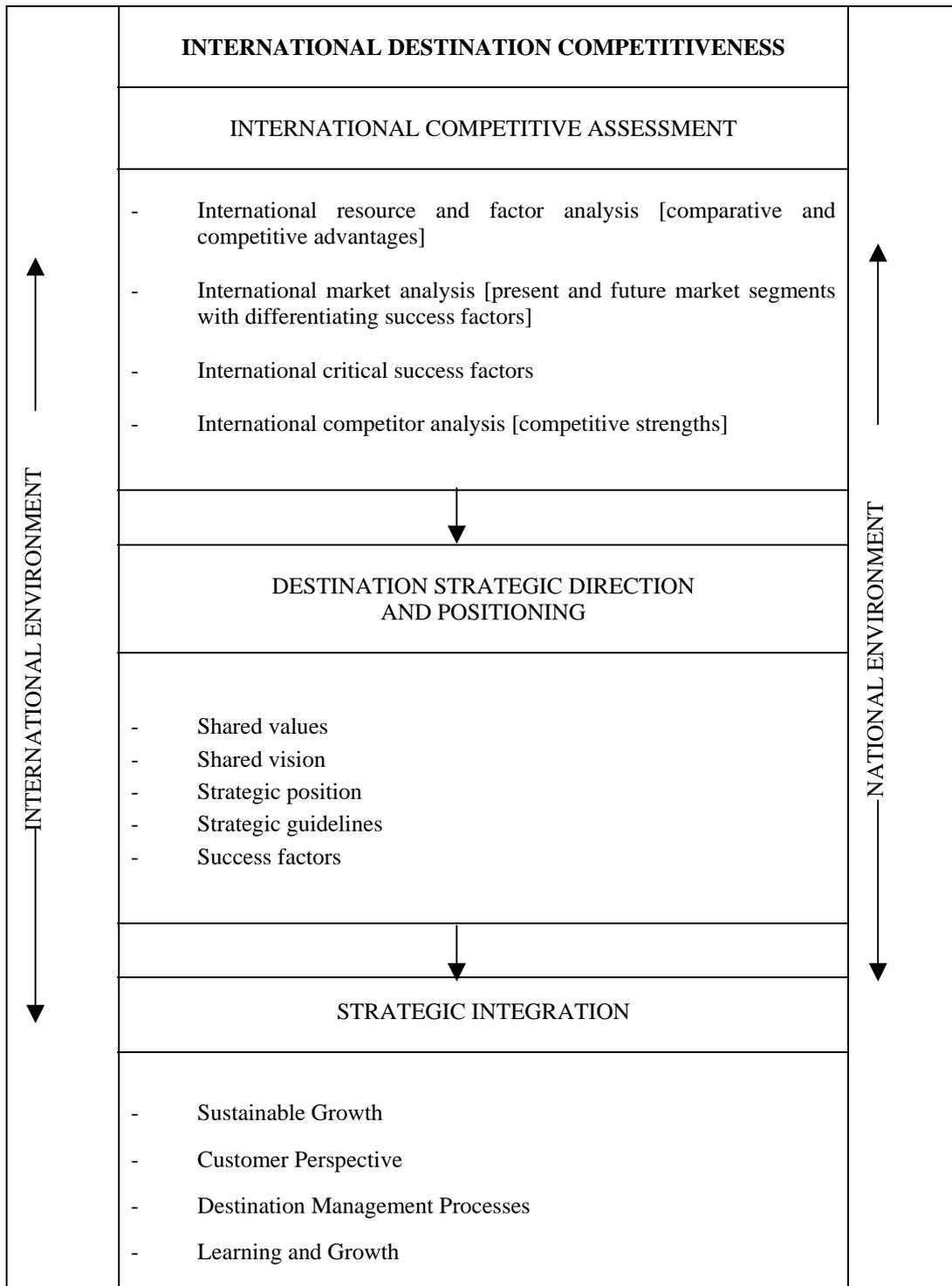
More specifically, the objectives of the study were:

- **To provide an overview and strategic analysis of the international and South African tourism industry [Chapter 2].** In order to have a meaningful base from which to approach the analysis of the national tourism situation and the development of a framework and model, it was deemed to be important for this study to:
 - Define the concepts tourism industry, tourism product, international tourist and tourism destination

- Explain the historical and organisational development of tourism in South Africa
 - Do a strategic analysis of international tourism as well as the South African tourism industries
-
- **To critically analyse the contemporary literature on critical success factors and strategic management [Chapters 3 and 4].** The main purpose of this study was to develop a model that can be used for the strategic identification and integration of critical success factors. The nature and extent of critical success factors were critically analysed and defined in chapter 3. It was reasoned that the identification of these critical success factors should take place within a strategic management framework. Chapter 4 was used to theoretically analyse the evolution of strategic management thought and to develop a strategic management framework based on the most recent literature and thoughts.

 - **To develop a strategic destination competitiveness model for the identification and integration of critical success factors [Chapters 4-7].** A basic model was proposed in chapter 4, based on the literature survey that was done. The model consists of three main components: international competitive assessment; destination strategic direction and positioning and strategic integration. The components served as a directive for chapters 5, 6 and 7 in which each of the components were critically analysed and developed. A final model was developed and presented in chapter 8. The model is shown in Figure 11.1

Figure 11.1 International destination competitiveness model



Source: Researcher's own construction

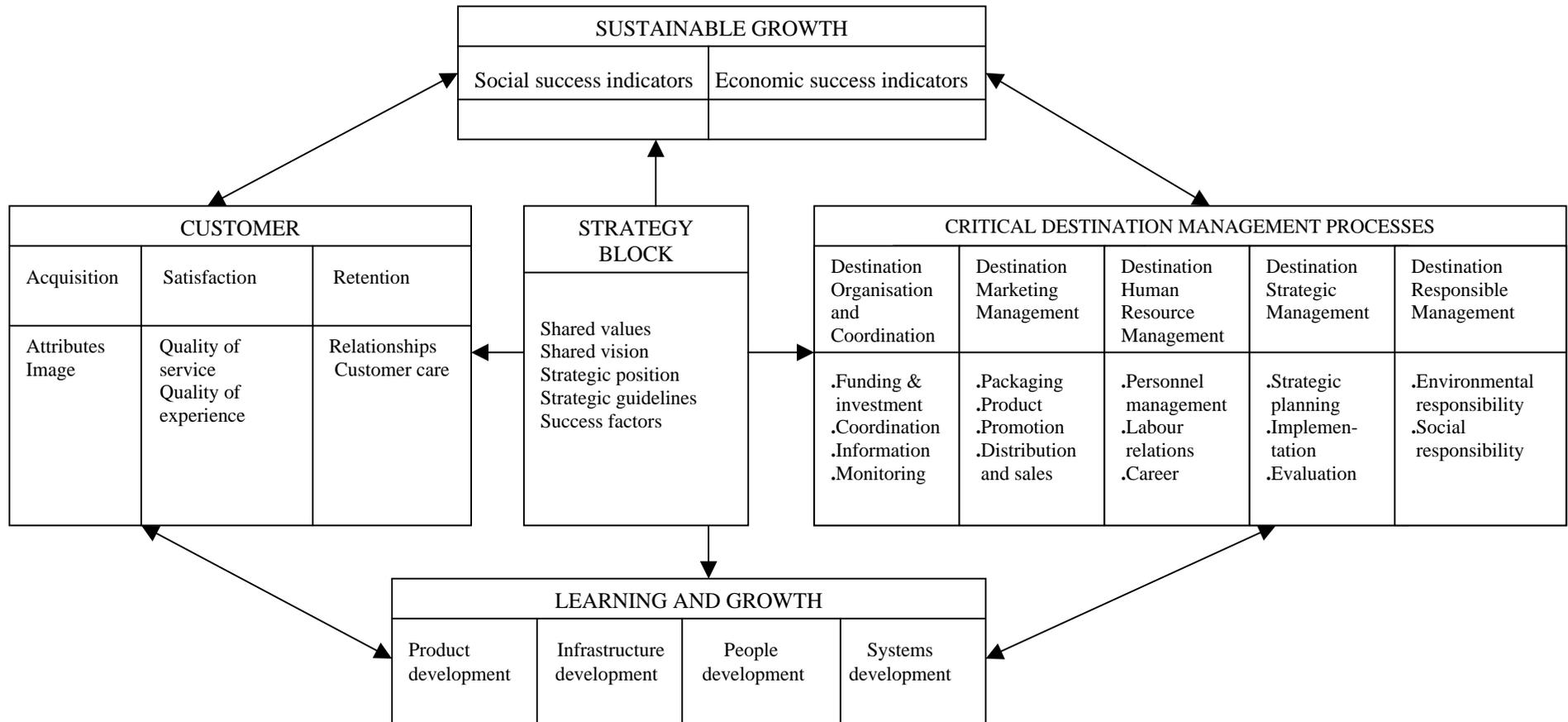
- **To critically analyse the key components of this strategic destination model [Chapters 5-7].** The international competitive assessment component was analysed and developed in chapter 5. The principle outcome of this analysis was the identification of international comparative and competitive advantages and international destination success factors that will provide meaningful direction to the destination for the development of a competitive strategy.

The second component: destination strategic direction and positioning was analysed and discussed in chapter 6. The focus of this component is on the strategic direction and positioning of the national destination and the outcomes of this process are shared values, a shared vision, strategic position and strategic guidelines.

The third component: strategic identification and integration was analysed in chapter 7. The first step was to do a literature survey of the important principles underlying the identification and integration of critical success factors.

The second part of the chapter reviewed two models of integration, namely Porter's Value Chain [1987] and Kaplan and Norton's Balanced Scorecard Model [1996]. The propositions of the two models were then evaluated and synthesized and a generic framework proposed. The framework is shown in Figure 11.2.

Figure 11.2 The strategic integration of destination success factors



Source: Researcher's own construction

The framework makes provision for the identification and integration of critical success factors by using four perspectives: sustainable growth, customer perspective, destination management processes and learning and growth. The sustainable growth perspective measures the sustainable growth that the tourism destination generates for all the stakeholders. It is divided into economic indicators and social indicators. The ultimate goal of the customer perspective is to identify critical success factors that will add optimum value to the customer experience at the tourism destination. Destination management processes that are critical for the destination are identified in the destination management process segment. Critical success factors within this process can then be identified and integrated. The fourth perspective: Learning and growth identified the critical success factors necessary for future development of products, infrastructure, people, systems and organisational structures. The model also proposes the integration of the critical success factors to achieve the vision and strategic objectives of the destination.

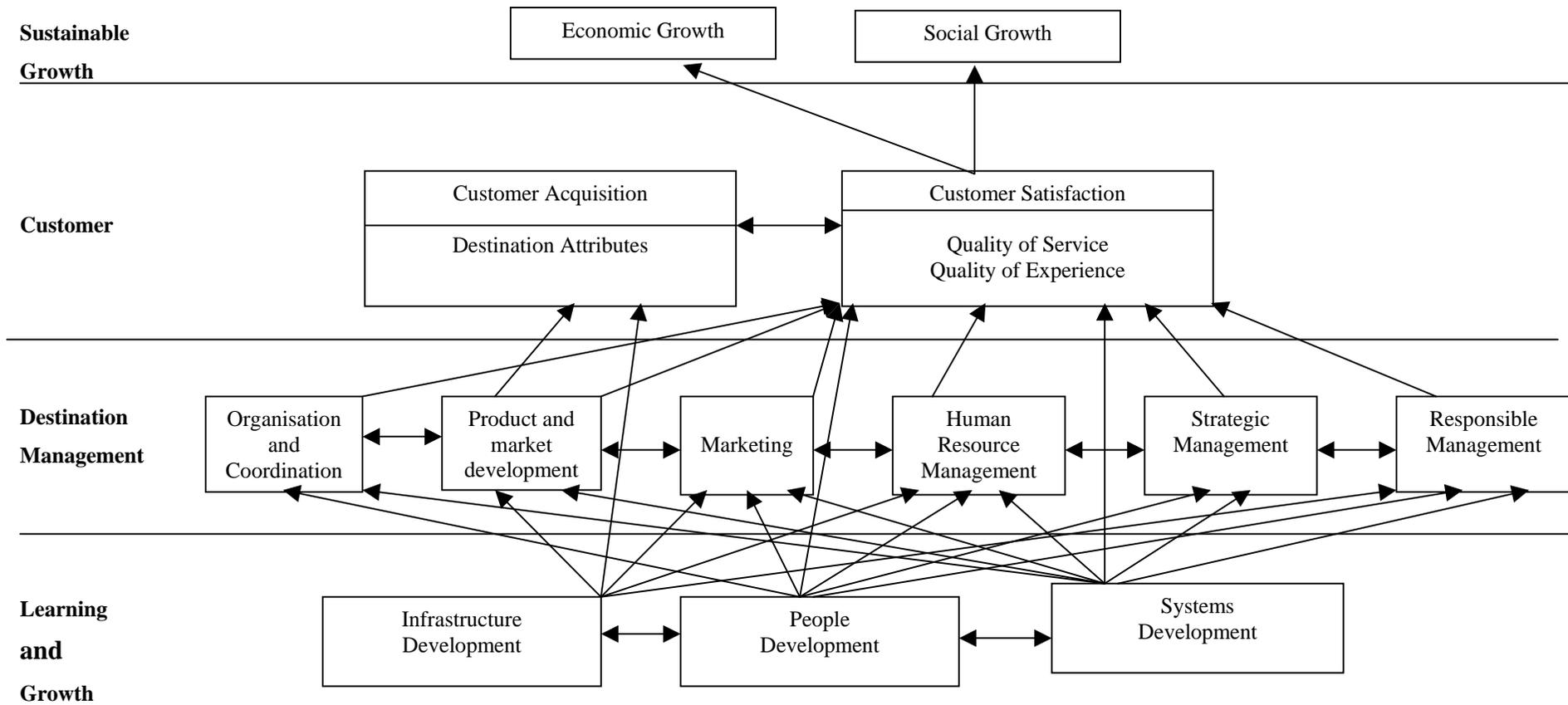
- **To determine possible critical success factors for a destination such as South Africa and how they can be integrated [Chapters 9 and 10].** This objective was achieved by means of the empirical research that was done. The results of the empirical research were discussed in chapters 9 and 10.

- **To provide guidelines on the identification, integration and management of critical success factors to ensure destination competitiveness and sustainable growth [Chapter 11].** These guidelines will be outlined and discussed in this chapter based on the empirical results and conclusions reached in chapter 9 and 10.

11.3 AN EVALUATION OF THE RESEARCH CONCLUSIONS

In this section, the findings and research conclusions will be discussed using the critical success factor integration tree, identified in chapter 10 as a point of reference. The results described in chapter 10 suggest that market and product development should be classified as a destination management process rather than a learning and growth component. The success factor tree shown in Figure 11.3 is accordingly adapted to make provision for this change.

Figure 11.3 South Africa – Success factor integration tree



Source: Researcher's own construction

a] Learning and growth perspective

The critical success factors identified in this perspective are the factors that can ensure that the destination achieves long-term growth and improvement so that it can stay competitive. These success factors are represented by three components in the tree: infrastructure development; people development and systems development.

The **infrastructure development success factors** are all considered to be of critical importance by South African stakeholders. These factors correlate directly with product and market development; marketing and responsibility management factors as indicated in Figure 11.3. Infrastructure development factors will, therefore, impact directly on the product, the market as well as the environment and society and should be integrated with these success factors to ensure success.

These factors will, however, also directly and indirectly through the management process, impact on the customer acquisition as well as customer satisfaction of the destination. If the infrastructure is good, it will contribute in making the destination more attractive on the one hand while customer satisfaction will also increase owing to the increase in quality of the infrastructural base.

The most important **people development success factors** identified by the respondents are skills training and education; community tourism awareness programmes; customer-care programmes and entrepreneurial-support programmes. The tree indicates that the people development success factors will impact on all the destination management processes except for product and market development. The development of human capital is, therefore, crucial for the management of all the destination processes and people development success factors should be integrated with the success factors of the destination management processes to ensure success. People development will also indirectly influence customer satisfaction through the management processes but also directly by initiatives like customer-care training. The effective recruitment, training and development of employees was also identified by respondents as the most important critical success factors for human resource management. This confirms the finding that people development and specifically, training and education, is regarded as critical for the success of South Africa as a

tourism destination.

Systems development factors that were identified as critical are: market research and intelligence and the optimum utilisation of the Internet and other technology tools. Systems development correlates very strongly with all the destination management processes and customer satisfaction. Systems development will ensure that the destination is able to generate and disseminate the information that is needed to take strategic decisions. Shapiro [1988: 120] postulates that to be of great use, “customer information must move beyond market research, sales and marketing and influence every organisational function”. The Cluster Consortium [1999: 218] find in their analysis that South Africa needs a comprehensive system of market research and tourist information.

b] Destination management processes

Destination management processes are those that can enhance the appeal of core resources and attractions, strengthen the quality and effectiveness of the customer satisfaction and adapt best to situational conditions [Dwyer, 2001: 74].

Five destination management processes were identified in the literature study with a sixth process being added, based on the results of the empirical study. The different processes can be seen in Figure 11.3.

Destination organisation and coordination was regarded as an important destination management process by the respondents and all the elements of this process were listed as critical by the respondents. More than 50% of the respondents considered the following elements as extremely important:

- Ensuring appropriate marketing organisations at all levels; and
- Ensuring appropriate funding to sustain destination marketing organisations.

For the open question, respondents added the following element as critical:

- Work as one to sell South Africa as a whole and not the provinces in isolation.

From the above it is evident that respondents wanted a well organised, coordinated, adequately funded and integrated marketing effort that would focus more on selling South Africa as a whole. This management process correlates strongly upwards with customer satisfaction as well as sideways with the other management processes. The strongest correlation downwards is with systems development, which shows that the respondents consider good systems, especially information systems, as important for the effective organisation and coordination of the destination.

Product and market development was added as a process based on the results of the empirical analysis. According to Poon [1993: 243] product development should be linked to marketing to ensure that the product reflects as closely as possible, the needs of the people who will make use of them. It is important to note that although the development of new attractions, experiences, tour routes and tour packages were considered in the literature as being important for the future growth of any destination, the respondents did not consider it as critical as some of the other factors. This may be the result of a lack of innovative thinking or not realising the importance of future thinking. Factors that were considered to be critical are upgrading of visitor services and facilities, development of new airline capacity and exploiting new market opportunities. There is a strong correlation upwards with both customer acquisition and customer satisfaction that shows that good product and market development will not only attract visitors, but will also lead to customer satisfaction. The strongest correlations downward are with infrastructure development and people development. Infrastructure development will be particularly important to support the product and market development.

Marketing as indicated earlier should be connected to product and market development to be successful. Most of the respondents regarded marketing as an extremely important process with specific emphasis on branding, target markets, distribution and sales and the integration and coordination of the marketing effort and funding. Here again it was indicated strongly by the respondents that there should be an integrated and coordinated marketing effort. Packaging, theming and routing of attractions and experiences were again considered not as critical. The strongest correlation downwards is with systems development, once again indicating the

importance of market research and information systems in this process.

In **Human Resource Management**, the respondents identified only one critical element namely: the effective recruitment, training and development of staff. The strongest correlation upwards is with customer satisfaction while the strongest correlation downwards is with people development. It was concluded earlier that the development of human capital was considered as being critical by the respondents in all the sections where it was listed as an element. It is interesting that although transformation is considered to be an important strategic issue in the South African tourism context, it was not considered to be critical by the respondents relative to other factors. This might indicate a lack of unified sense of direction and shared vision among stakeholders.

Most of the respondents regarded the **Strategic Management** of the destination as critical. All the elements listed have an average mean of above 4 with strategic direction having the highest mean of 4,14. The high importance rating given to strategic direction confirms the findings of the literature study in Chapter 6 on strategic direction. The strongest correlation upwards is with customer satisfaction and the strongest correlation downwards is with people development. People must be developed and trained in strategic management to make the process successful.

Responsible Management was considered by the respondents as critical and all the elements received an average rating of above 4 [extremely important]. It is evident that the respondents realised the importance of sustainable development and the protection of the environment and societies. This is also in line with the international Delphi survey that indicates that internationally respondents consider the achievement of sustainable development in tourism a strategic challenge. The process correlates strongly upwards with customer satisfaction and the strongest downward correlation is with people development factors that show that there should be investment in people to make sure that responsible management succeeds.

c] Customer perspective

The ultimate goal of the customer perspective is to add optimum value to the

customer experience at the tourism destination. It consists of two parts: customer acquisition and customer satisfaction. The destination management processes will organise, lead and coordinate this value-adding process, while the learning and growth factors will ensure that competencies are developed and critical resources maintained so that future value can be created.

Customer acquisition represents the most important attributes of the destination that will attract international tourists. The most critical attributes of the destination as identified by the respondents in order of importance are:

- Wildlife experiences
- Perceived safety
- Perceived image
- Accessibility
- Scenic beauty
- Quality level of tourism facilities
- Climate

International tourists visiting South Africa listed scenic beauty, wildlife experiences and climate as the three most important attributes [SATOUR, 1999: 51]. It is evident that these factors had always played an important role in attracting tourists to South Africa. The other critical attributes identified by respondents namely: safety, image, accessibility and quality of tourism facilities, were also identified by respondents in the international survey as critical for success. This shows the importance of using international critical success factors as benchmarks in strategic planning. Three success factors that were indicated as largely significant but not critical are cultural experiences, eco-tourism and adventure experiences. Lubbe [2003: 79] points out that eco-tourism and adventure tourism are some of the fastest growing tourism segments in the world. It seemed that South African stakeholders might not be pro-active enough in identifying these as critical. The results show that the biggest correlation is between customer acquisition and customer satisfaction, while the biggest downward correlation is with product and market development and infrastructure development. Both these processes will have a huge influence on the attractiveness of the destination.

The literature study shows that **customer satisfaction** for the tourism destination can best be represented by quality of service and quality of experience. Most of the respondents' views are that to satisfy the international tourist, **the experience** must be safe, enjoyable, memorable, comfortable and relaxing. It was not considered to be critical that the experience be interactive, novel and authentic and stimulating. The respondents further indicated that to satisfy the customer, **the quality of service** of accommodation, restaurants, access to natural areas, tourist information, tour guides, airports and financial and communication institutions must be of a high standard. Services that were considered of lesser importance were taxi services, public transport, conference facilities, recreation facilities, sport facilities, e-commerce, tours and shopping facilities.

d) Sustainable growth

The ultimate goal of the national destination is to achieve sustainable growth in an international competitive market. All the previous processes and activities should, therefore, lead to sustainable growth for the destination. The literature study shows that sustainable growth can be measured, targeted and monitored by using economic and social indicators.

The results of the empirical study indicated that the respondents had no preference for specific indicators and considered all the indicators listed as critical. It is interesting that, although transformation is considered as largely important, it is not rated by the respondents as a critical social indicator. The data further indicated that with the exception of responsible environmental practices, all the means were below 4, whereas with the economic indicators, they were all above 4. This shows that respondents in South Africa still consider the economic factors to be more important than the social factors.

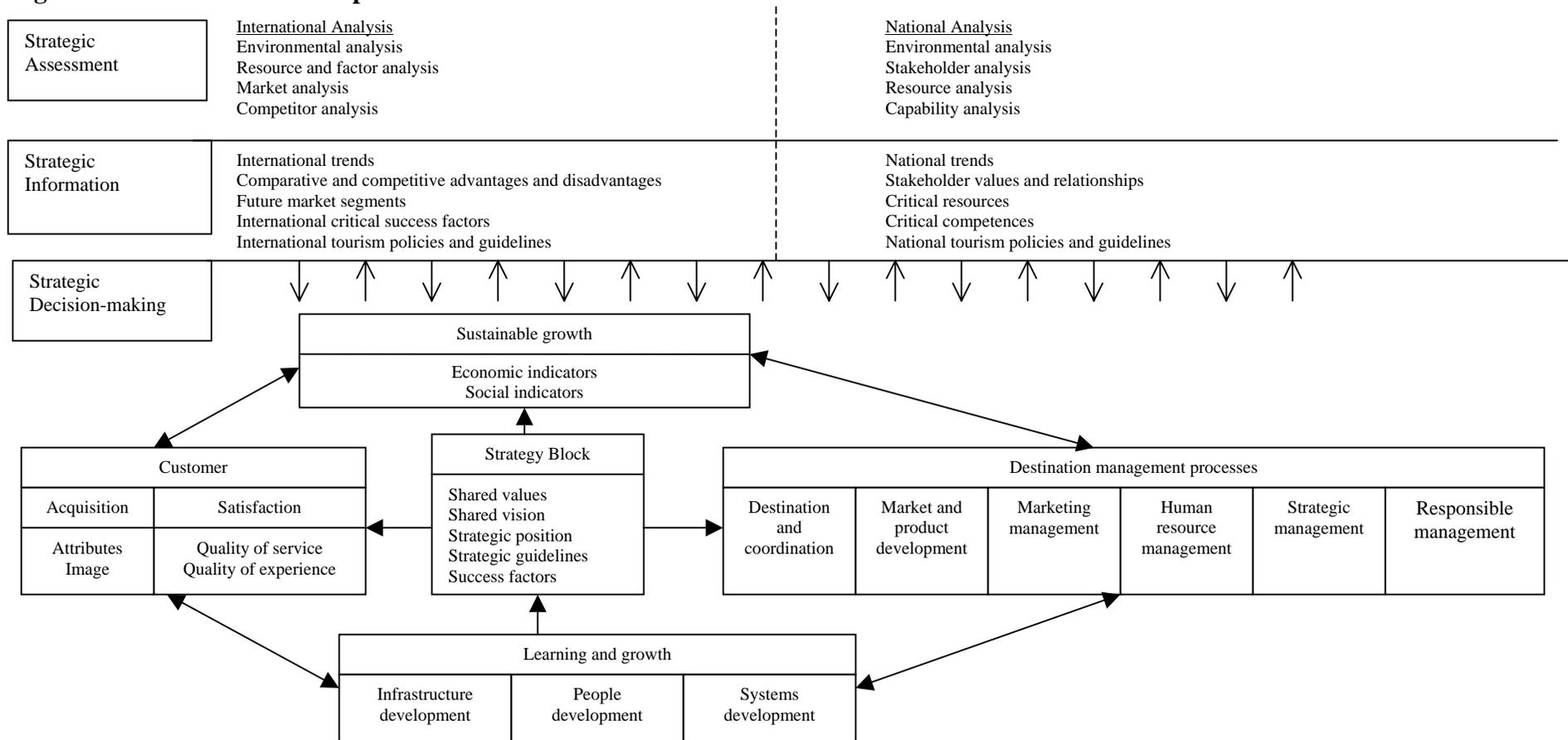
11.4 A PROPOSED DESTINATION COMPETITIVENESS MODEL

One of the objectives of this study was to develop a destination competitiveness model. A basic model was proposed in chapter 4, based on the literature survey that was done. The initial model consisted of three components: international competitive assessment, destination strategic direction and positioning and strategic integration. The components served as a directive for chapters 5, 6 and 7 in which each of the components were analysed and developed. A model, based on the literature, was then presented and compared to other destination competitiveness models in chapter 8. Certain changes were proposed to the model based on the results of the empirical study and were described in chapter 10.

The aim of this section is to summarise the final proposed model derived from this study. This model could have wider application and could be utilised by other national tourism destinations and also in an adapted form by provincial, regional and local tourism destinations.

The final model is illustrated in Figure 11.4.

Figure 11.4 Destination competitiveness model



Source: Researchers own construction

The destination competitiveness model is divided into three sections: strategic assessment, strategic information and strategic decision-making. Continuous assessment should take place to ensure that the necessary information is provided to the destination on which sound strategic decisions can be based. The strategic information should not only be the outcomes of the strategic assessment but should also include available and applicable information such as international and national tourism policies and guidelines. The model's success depends on the effectiveness of the organisational learning that took place. Destinations must learn by gathering strategic information based on relevant assessments. This information must then be analysed to develop new strategic knowledge that will act as the basis of new critical competencies and critical success factors that will produce superior performance, competitiveness and sustainable growth for the destination. The three components will now be discussed.

11.4.1 Strategic assessment

The strategic assessment consists of an international analysis as well as a national analysis. The international analysis should focus on the national environmental analysis [Chapter 2], a stakeholder analysis [Chapter 6] and a resource and capability analysis [Chapter 6]. The international analysis should focus on the execution of an international competitive assessment [Chapter 5], as well as international environmental trends [Chapter 2]. The purpose of the strategic assessment is to produce strategic information that could enable decision-makers to develop new knowledge on which to base their decisions.

11.4.2 Strategic information

The strategic information phase will consist of the information outcomes of the strategic assessment as well as other information that will be important for strategic decision-making. International trends, for example, will flow out of the international environmental analysis, while comparative and competitive advantages will be the outcomes of the resource and factor analysis and the competitor analysis. The market analysis will produce existing and future market segments and the critical success

factors within these segments [Chapter 5]. The national information will flow out of the national environmental analysis, the stakeholder analysis and the strategic capability analysis [Chapter 5].

Other information that is important for the strategy making process is international and national tourism policies and guidelines, especially sustainable development guidelines [Chapter 7]. The assessment and information gathering process should, therefore be a continuous process that produces a constant flow of useful information for strategic decision-makers. The destination should further have systems in place to ensure that this process is effective and contributes to destination learning.

11.4.3 *Strategic decision-making*

The strategic decision-making phase will consist of two parts. The first one is the determination of the strategic direction and positioning of the destination [Chapter 6] [This is represented by the Five S Strategy Block in Figure 11.4 consisting of shared values, shared vision, strategic position, strategic guidelines and success factors]. The second part is the identification and integration of critical success factors within four perspectives: sustainable growth, customer, destination management process and learning and growth. Critical success factors cannot be identified and integrated if the strategic direction and position of the destination is not clarified. The strategy block should, therefore, serve as the “nerve centre” from where critical success factors will be identified and integrated. The identification and integration of critical success factors for South Africa as a tourism destination, as was outlined in section 11.3, was applied in this study by means of an empirical survey.

11.5 RECOMMENDATIONS

Based on the information obtained in the literature study and the results of the empirical survey, certain recommendations can be made to the South African tourism industry. These are discussed below under the headings of sustainable growth; safety and security management; people development and systems development; marketing and product development; responsible management; attracting international tourists;

satisfying the customer; and destination strategic management process.

a] Sustainable growth

In contrast to the triple bottom line approach, the respondents considered the economic factors as more important and the social and environmental factors as less important in the determination of sustainable growth for the destination. The respondents had no further preference for specific indicators and considered all the indicators listed as critical.

It is, therefore, recommended that sustainable growth objectives be clarified, that clear indicators are identified, and specific targets are set in terms of these growth objectives. A balanced holistic approach to sustainable tourism that takes into account the needs for community development, engagement and empowerment should be promoted.

b] Safety and security management

Safety and security management was identified as the most important international critical success factor in the international survey. In the national survey, it was identified as a critical attribute to attract international tourists as well as the most important customer satisfaction success factor. Safety and security management was also identified as the most important critical success factor for infra-structure development and management.

It is evident from the above that safety and security are considered the most important critical success factors by international as well as national tourism stakeholders.

It is clear that steps to reduce safety risk will have to play a key role in future tourism strategy. Steps such as encouraging the government and police to reduce levels of violence and crime in the country as a whole and increasing foot patrols in tourism areas, are essential. It is, however, also clear that safety and security management should be integrated with tourism management who should be expected to address this problem innovatively. For example, safety and security provisions should be

built into national, provincial and local tourism, resulting in specific tourism security initiatives.

c] People development and systems development

People development and systems development were identified as the most important components under learning and growth of the success factor tree with the strongest correlation being with the destination management processes.

People development refers to development in customer-care, skills and education, community tourism awareness and entrepreneurship. The tree indicates that people development success factors will impact on all the management processes. The development of human capital is, therefore, crucial for the management of all the destination management processes and people development success factors should be integrated with the success factors of the destination management processes to ensure success and specifically to lead to optimum customer satisfaction.

The South African tourism industry, therefore, requires a multi-disciplinary and integrated approach to addressing the perceived inadequate training and education. It is evident that appropriate tourism training courses should receive priority attention, and that more effort should be directed towards achieving international standards of professionalism in the South African tourism industry. Education and training should, therefore, be at the forefront of tourism development and should be expanded to school curricula and tertiary institutions.

The respondents indicated that **systems development** with specific reference to market research and intelligence and the optimum utilisation of the Internet, and other technology tools, was important. Appropriate systems development can ensure that the destination will be able to generate and disseminate the information that is needed to take strategic decisions. The purpose of the system should be to provide sufficient and useable information that will enhance the process of strategic knowledge creation.

d] Marketing and product development

Effective and coordinated **marketing** effort was identified in the international Delphi survey as one of the most important critical success factors for international tourism destinations. Most of the South African respondents regarded marketing as an extremely important process with specific emphasis on branding, target marketing, distribution and sales and the integration and coordination of the marketing effort. It was also strongly indicated by respondents that there should be an integrated and collective marketing effort and that South Africa should be marketed as a whole. It is therefore recommended that the marketing efforts of provinces be integrated and coordinated in a South African effort. Marketing also shows a strong correlation with systems development once again increasing the importance of market research and information systems in this process.

Selected future strategic trends in destination marketing thinking identified by studies conducted by the WTO [1999] and Heath [2000] and applicable to this study are as follows:

- Increasing utilisation of appropriate tourism intelligence and market research as a base for strategy development;
- Increasing, more focused and more aggressive marketing;
- Placing strategic emphasis on destination branding and competitive positioning;
- Diversifying and enhancing the product offering and selling experiences rather than products;
- Capitalising on the collective attractiveness of destinations; and
- Increasing utilisation of new technology based communication and promotional vehicles.

Product development should be linked to marketing to ensure that the product reflects as closely as possible the needs of the people who will make use of them. It is important to note that, although the development of new attractions, experiences, tour routes and tour packages were considered in the literature as being important, the respondents did not consider it as critical. This must be addressed to ensure that

innovation will be enhanced in product development. There is a strong correlation with customer acquisition and customer satisfaction that shows that good product development and marketing will firstly attract customers, and secondly make sure that their visit is satisfying. South Africa should therefore devote attention to innovative product development and link the marketing process to this to ensure synergy and sustainable product/market matches.

e] Responsible management

It is recommended that responsible management principles become an important factor for the identification and integration of critical success factors in South Africa as advised in chapter 7. There should also be a direct relationship between this process and the achievement of social and environmental protection targets as defined by the sustainable growth indicators identified by the destination.

The Department of Environmental Affairs and Tourism [DEAT, 2003] identified the following applicable guidelines for responsible tourism:

- Responsibility of the tourism industry to promote balanced and sustainable tourism with the focus on the development of environmentally based tourism activities.
- Responsibility of government and business to involve the local communities through the development of meaningful economic linkages.
- Responsibility of the tourism industry to respect, invest in and develop local cultures and protect them from over-commercialisation and over-exploitation.
- Responsibility of local communities to become actively involved in the tourism industry, to practice sustainable development and to ensure the safety and security of the visitors.
- Responsibility of both employers and employees in the tourism industry to each other as well as to the customer.

f] Attracting international tourists

Tourists will be attracted by the important attributes of the destination. This research

has shown that the traditional attributes associated with South Africa, namely, wildlife experiences, scenic beauty and climate are still used to attract international tourists to South Africa and are considered to be critical. A recent report by South African Tourism [2002: 26] indicates that South Africa did not own any key attributes in the minds of the consumer and, in most cases, South Africa was “stuck in the middle”.

It was advised that South Africa identified growth segments and redefined its attributes in successful brands that will cater for the needs of the new segments. In its Tourism 2020 Vision, the WTO [1999] identified five key market segments that are growing in importance, namely, eco-tourism, cultural tourism, the cruise market and adventure tourism. With environmentalism becoming more important to more people, especially to North Americans and Europeans, the size of the eco-tourist segment is expected to increase dramatically in the 21st century [Lubbe, 2003: 263]. Adventure tourism is, according to all indications, likely to also grow in popularity [WTO, 1999]. Adventure tourism are outdoor- or wilderness related, and go hand in hand with eco-tourism. Bungee jumping, parachuting and rock climbing are all examples of adventure activities. Although eco-tourism and adventure tourism are indicated as two of the fastest growing segments in the world, they were not considered as critical to attract international tourists by the respondents of this study.

Other factors that need to be in place to attract tourists are safety and image, accessibility and quality of tourism facilities. Accessibility, especially for a long-haul destination such as South Africa is also important. The development of new airline capacity was identified as critical for the success of product and market development. All of the above should be incorporated into an image of the organisation that will attract tourists and ensure growth and competitiveness for the destination as a whole.

g] Satisfying the customer: Quality of service and quality of experience

The **quality of service** is important for South Africa as a tourism destination. The Cluster Consortium [1999: 220] found that South Africa lags behind in service excellence. To satisfy the international tourist, the quality of service of accommodation, restaurants, access to natural areas, tour guides, airports and financial and communications institutions must be of a high standard. Infrastructure

development factors such as provision of appropriate transport systems, roads, airport and rail-ports should be integrated with the other factors to support service excellence.

Quality of experience is becoming an ever-increasingly important factor in the satisfaction of the customer. The international Delphi survey indicates that quality of experience was also considered to be critical by the international respondents. The key to the satisfaction of the international tourist is that the quality of the experience of the trip to South Africa delivers on the marketing promise. Market segmentation and the experience critical success factors within these segments will, therefore, be important for South Africa. South Africa should be very clear on what experiences different target markets seek. The perception, as indicated by the respondents, that the experience should be enjoyable, memorable, comfortable and relaxing may not be enough and potential visitors might increasingly seek an experience that is interactive, stimulating, novel and authentic.

According to Lubbe [2003: 247] tourists from knowledge-based economies [e.g. Western Europe and the USA, which comprises approximately 70% of overseas arrivals to South Africa] are increasingly found to be more experienced and are seeking interactive, highly involved, quality travel experiences, focusing on in-depth coverage of the special topic or destination explored. This shift has major implications for tourism provided in South Africa as the motivations for travel move away from comfortable and relaxing experiences to experiences that are more interactive, stimulating and educational. It is clear from the research that South African tourism stakeholders have not adapted to this new paradigm shift yet.

h] Destination strategic management process

This study proposes a holistic approach to the strategic management process of destinations in which knowledge creation and strategic learning will be a priority. This process will only be successful if it is supported by a proper strategic assessment process and the continuous flow of formal and informal strategic information to all strategic decision-makers of the destination.

Although examples were found in recent literature of competitive assessments,

specifically resource and factor analysis [The Cluster Consortium, 1999] and market analysis [SATOUR, 1999; and The Monitor Group, 2001] that was done for South Africa, there seemed to be no coordinated effort of doing a complete competitive assessment for the destination as a whole. Information flowing out of these assessments, strategic guidelines as well as other emergent strategic information should further be available to strategic decision-makers at all times. It was admitted in a recent report [South African Tourism, 2002: 4] that South Africa was in the past hamstrung and limited in its strategic effectiveness by the absence of proper data and market intelligence.

Destination success factors can only be identified and integrated within clear and unified strategic directives that are shared and supported by all the stakeholders. The two most important outcomes of the strategic direction process as discussed in chapter 6, is the shared vision and the strategic position of the destination.

Existing visions of South Africa as a tourism destination were critically analysed in chapter 6. The vision of the Cluster Consortium [1999: 16] was found to be the most comprehensive and representing stakeholder's expectations. More should, however, be done to ensure that a unified vision is shared and supported by everyone in the industry. No evidence could be found that a central vision formulation exists that is detailed enough to serve as a direction-measuring instrument for all strategic decisions that are taken.

The strategic competitive position of South Africa should be determined and clarified to ensure a coordinated and integrated effort of all stakeholders to accomplish and sustain it. Effective market research, market segmentation and the identification of critical success factors within these market segments can enhance the process of identifying and evaluating existing and future market segments. Product development should be innovative and should be linked to the marketing process. The holistic approach, however, also advocates the incorporation of the strategic capability into this process. This will entail the identification of core resources and competency gaps and the development of unique competences and resources that will sustain the competitive advantages of the destination.

The strategic process should not only identify factors critical for success, but integration relationships between these factors should also be explored. The approach, motivated by this study, will ensure that the strategic effort is coordinated and integrated with increased effectiveness opposed to a fragmented approach that could lead to failure and the wasting of resources.

11.6 SUGGESTIONS FOR FUTURE RESEARCH

Based on the results of this study, the following suggestions are put forward for consideration regarding future research:

- The testing of the destination competitiveness model developed in this study in other rival national destinations and comparing the results of these with the results of South Africa.
- An investigation into the effectiveness of strategic direction and position formulation, communication and implementation in the South African context.
- An investigation into the effectiveness of the strategic assessment and strategic information dissemination in creating strategic knowledge for a destination such as South Africa.
- A critical analysis of the strategic capability of a destination such as South Africa and the matching of these with the product offering and market focus.

11.7 CONCLUDING COMMENTS

The identification and integration of critical success factors are important in the achievement of international competitiveness for a tourism destination. The model developed in this study can be used to identify and integrate critical success factors for South Africa or for any other destination in the world.

This study has identified and integrated possible critical success factors for the tourism industry in South Africa. The factors that are critical for the international competitiveness of South Africa have not been the subject of any previous research. These factors were identified by means of a literature review as well as an empirical

study. Empirical research was conducted in a survey to collect data among South African stakeholders and their responses were analysed by means of statistical methods.

This study contributes to the tourism management science by developing a destination competitiveness model that can be applied to any international destination. The model also suggests an effective way of identifying and integrating critical success factors that will lead to international competitiveness and sustainable growth.

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