

ANNEXURE “A”

SURVEY TO IDENTIFY AND INTEGRATE THE STRATEGIC FACTORS THAT WILL DETERMINE THE SUCCESS OF SOUTH AFRICA AS A TOURISM DESTINATION

The Department of Tourism Management at the University of Pretoria is currently conducting a study with the following objectives:

- To develop a model of destination competitiveness
- To use this model to identify and integrate the strategic factors that will determine the success of South Africa as an international tourism destination
- To provide guidelines and develop a framework for identification and integration of critical success factors for an international tourism destination

As a stakeholder in South Africa's tourism industry, you will have valuable insights which can assist us to achieve the study objectives. We would greatly appreciate it if you could spend some time answering questions about South Africa as a tourism destination.

This survey is an attached word document and should take around twenty minutes to complete. We have tried to make it as "user friendly" as possible. You can type your responses directly on the questionnaire, save it and return it to the e-mail address below or fax it to the number below.

A copy of the final report will be sent to all participants with our grateful acknowledgement.

Thank you

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ANNEXURE B

DOMESTIC STAKEHOLDER SURVEY

**SURVEY ON THE COMPETITIVENESS OF SOUTH AFRICA AS AN
INTERNATIONAL TOURISM DESTINATION**

SECTION A: GENERAL INFORMATION

1. Name of your organisation (optional):
2. Position of person completing the questionnaire:
3. What is your type of business?

3.1 Is it a Destination Marketing Organisation (DMO)?

Yes	No
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If yes, which one of the following is it? Please tick the appropriate block

National (e.g South African Tourism)

1

Provincial (e.g. Gauteng Tourism Authority)

2

Regional (e.g. Winelands Regional Tourism)

3

Metropolitan (e.g Tshwane Tourism Association)

4

Other (Please specify)

5

3.2 Are you a Private Sector Stakeholder?

Yes	No
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If yes, which of the following is it? Please tick the appropriate block(s)

Tourist attraction

1

Accommodation facility

2

Conference facility

3

Game lodge/nature reserve / show farm

4

Distribution channel (e.g. Tour operator/travel agent)

5

Airline

6

Ground transport (rail, coach, car rental, etc.)

7

Other (Please specify)

8

4. Where is your organisation located?

Gauteng	<input type="text" value="1"/>	Free State	<input type="text" value="2"/>	Mpumalanga	<input type="text" value="3"/>
Kwazulu-Natal	<input type="text" value="4"/>	North-West	<input type="text" value="5"/>	Limpopo	<input type="text" value="6"/>
Eastern Cape	<input type="text" value="7"/>	North Cape	<input type="text" value="8"/>	Western Cape	<input type="text" value="9"/>

5. What are the estimated percentage shares of your domestic and international business?

	<input type="text" value="Percentage"/>
Domestic	<input type="text"/>
International	<input type="text"/>
	Total:
100%	

6. For how long has your organisation been in operation? Tick the appropriate box.

1 – 5 years	<input type="checkbox"/>
6 – 10 years	<input type="checkbox"/>
Longer Than 10 years	<input type="checkbox"/>

INTERNATIONAL STAKEHOLDER SURVEY
SURVEY ON THE COMPETITIVENESS OF SOUTH AFRICA AS AN
INTERNATIONAL TOURISM DESTINATION

SECTION A: GENERAL INFORMATION

1. Name of your organisation (optional):

2. Position of person completing the questionnaire:

3. What is your type of business? Please tick the appropriate block.

Airline

Tour operator

Tour wholesaler

Travel agent

Other (Please specify)

4. What other destinations do you market? Please tick the appropriate block(s).

Southern African countries

Africa at large

Destinations in Europe

Destinations in North America

Destinations in South America

Destinations in Asia

Destinations in Australasia

Other (Please specify)

5. What is the estimated number of visitors that your organisation brings to South Africa annually?

Estimated number of visitors per annum	
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6. In order of importance, please indicate your top 3 destinations in terms of market share

Destination	Approximate percentage share of your business
1.	
2.	
3.	

7. What is the importance that your organisation attaches to South Africa as a tourism destination? (Please tick)

	Very important	Of increasing importance	Of diminishing importance	Not important
Currently				
In the future				

SECTION B: SUSTAINABLE GROWTH

B1. In your opinion, how significant are the following indicators to **measure the economic performance** of South Africa as an International Tourism Destination?

INDICATORS OF PERFORMANCE	1	2	3	4	5
	Not at all significant	To some extent significant	Reasonably significant	Largely	Absolutely significant
B1.1. South Africa's share of the long haul tourism market					
B1.2. The number of international visitor arrivals to South Africa					
B1.3 Tourism's contribution to South Africa's gross domestic product (GDP)					
B1.4 Volume of revenue composition of foreign portfolio					
B1.5 Foreign exchange earned					
B1.6. Tourism's contribution to employment and new job creation					
B1.7. Other (please specify)					

B2. In your opinion, how significant are the following indicators to **measure the contribution of international tourism to South Africa's social and environmental objectives?**

INDICATORS OF PERFORMANCE	1	2	3	4	5
	Not at all	To some extent	Reasonably significant	Largely significant	Absolutely
B2.1. Increased community involvement in tourism					
B2.2. Transformation of the tourism industry					
B2.3. Increased entrepreneurial opportunities for previously disadvantaged persons					
B2.4. The implementation of responsible environmental practices					
B2.5. Other (Please specify)					

SECTION C: CUSTOMER PERSPECTIVE

C1. THE ATTRACTIVENESS OF THE DESTINATION

The attractiveness of a destination to a potential visitor is largely determined by specific attributes inherent to the destination. In your view, how significant are the following **attributes in attracting international tourists to South Africa in the future?**

Attributes	1	2	3	4	5
	Not at all significant	To some extent significant	Reasonably significant	Largely significant	Absolutely significant
C1.1. Scenic beauty					
C1.2. Wildlife experiences					
C1.3. Cultural experiences					
C1.4. Eco tourism experiences					
C1.5. Adventure experiences					
C1.6. Climate					
C1.7. Family-orientated experiences					
C1.8. Entertainment and recreational experiences					
C1.9. Participation in major events (e.g. World summit in 2002 and cricket world cup in 2003) level					
C1.10. The quality level of tourism facilities and amenities					
C1.11. Visits to friends and family (VFR)					
C1.12. Visits for business purposes					
C1.13. Perceived safety of the destination					
C1.14. Accessibility to the destination (flying time, Visa requirements, etc.)					
C1.15. Perceived image of the destination relative to competing destinations					
C1.16. Other (Please specify)					

C2. QUALITY OF EXPERIENCES AND SERVICES

The level of satisfaction of the international tourist will depend on the quality of experience and the quality of service at the tourism destination. In your view, how important are the following factors **to ensure optimum satisfaction for the international tourist who visits South Africa.**

CUSTOMER SATISFACTION	1	2	3	4	5
	Not important	Some important	Reasonably important	Very important	Extremely important
C2.1. Tourism experience is enjoyable and memorable					
C2.2. Tourism experience is interactive					
C2.3. Tourism experience is novel and authentic					
C2.4. Tourism experience is comfortable and relaxing					
C2.5. Tourism experience is safe					
C2.6. Tourism experience is stimulating (educational, informative and challenging)					
C2.7. Airport quality and efficiency					
C2.8. Quality and availability of tourist information					
C2.9. Quality and availability of taxi services					
C2.10. Public transport efficiency and quality					
C2.11. Availability of knowledgeable tour guides					
C2.12. Variety and quality of accommodation					
C2.13. Quality of restaurant/eating facilities and services					
C2.14. Visitor accessibility to natural areas					
C2.15. Quality and capacity of convention and conference facilities					
C2.16. Availability and accessibility of recreation facilities (e.g. Parks, leisure facilities, horse riding, etc).					
C2.17. Availability and accessibility of sports facilities (e.g. Golf, Tennis)					
C2.18. Availability and quality of health/medical facilities to serve tourists					
C2.19. Access to quality financial institutions and currency exchange facilities					
C2.20. Access to affordable telecommunications facilities					
C2.21. Extent of technology and e-commerce usage by tourism industry					
C2.22. Quality and availability of tours					
C2.23. Quality and diversity of shopping facilities					
C.2.24. Other (Please specify)					
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SECTION D: DESTINATION MANAGEMENT PROCESSES

In your view, what role will each of the following **national destination management processes** play to **ensure the success** of international tourism in South Africa

DESTINATION MANAGEMENT PROCESS ACTIVITY		1	2	3	4	5
		Not important	Some importance	Reasonably important	Very important	Extremely important
MANAGEMENT PROCESS	KEY ELEMENTS					
1. DESTINATION ORGANISATION AND CO-ORDINATION	1.1 Ensuring appropriate destination marketing organisations at all levels (national, provincial, etc.)					
	1.2 Continuous co-ordination and co-operation between tourism stakeholders					
	1.3 Ensuring appropriate funding to sustain destination marketing organisations					
	1.4 Implementing appropriate benchmarking, monitoring and evaluation mechanisms.					
	1.5 Other (Please specify)					
2. DESTINATION MARKETING	2.1 Developing an effective branding strategy for the destination					
	2.2 Developing an effective positioning strategy for the destination					
	2.3 Determining relevant, viable and sustainable target markets					
	2.4 Packaging themeing and routing current tourism attractions and experiences and developing those with potential					
	2.5 Ensuring integrated promotion strategies (e.g. advertising, exhibitions, internet, workshops, etc.)					
	2.6 Ensuring effective distribution and sales (effective information dissemination, brochure distribution, reservation systems, etc.)					
	2.7 Other (Please specify)					

DESTINATION MANAGEMENT PROCESS ACTIVITY		1	2	3	4	5
		Not important	Some importance	Reasonably important	Very important	Extremely important
3. HUMAN RESOURCE MANAGEMENT	3.1 Effective recruitment, training and development of destination marketing staff					
	3.2 Implementing appropriate transformation strategies					
	3.3 Providing appropriate career paths					
	3.4 Ensuring appropriate labour relations and negotiations strategies and processes					
	3.5 Other (please specify)					
4. STRATEGIC DESTINATION MANAGEMENT	4.1 Providing strategic direction (shared vision and strategic framework)					
	4.2 Continuous macro, competitive and market analysis					
	4.3 Formulation and implementation of integrated destination strategies					
	4.4 Strategic benchmarking, monitoring and evaluation					
	4.5 Other (please specify)					
5. RESPONSIBLE DESTINATION MANAGEMENT	5.1 Putting mechanisms in place to protect the interests of local communities					
	5.2 Putting mechanisms in place to preserve cultural integrity and authenticity					
	5.3 Ensuring environmental and social impact assessments as a base for future tourism development					

DESTINATION MANAGEMENT PROCESS ACTIVITY		1	2	3	4	5
		Not important	Some importance	Reasonably important	Very important	Extremely important
5. RESPONSIBLE DESTINATION MANAGEMENT	5.4 Incentivising tourism stakeholders who adhere to the principles of sustainable development					
	5.5 Promoting the importance of responsible tourism practices on the part of tourists, communities and the tourism industry					
	5.6 Other (please specify)					

SECTION E: LEARNING AND GROWTH

In your view, how important are the following factors for the **future growth and sustainable development** of South Africa as an international tourism destination.

LEARNING AND GROWTH FACTOR		1	2	3	4	5
		Not important	Some importance	Reasonably important	Very important	Extremely important
SUCCESS FACTOR	FACTORS					
1. PRODUCT AND MARKET DEVELOPMENT	1.1. Development of new attractions and experiences					
	1.2. Development of new tour routes and tour packages					
	1.3. Exploiting new market opportunities and focusing on new market segments					
	1.4. Development of new airline alliances					
	1.5. Upgrading and further developing visitor services and facilities					
	1.6. Other (Please specify)					
2. INFRASTRUCTURE DEVELOPMENT AND MANAGEMENT	2.1 Responsible destination planning and resource usage					
	2.2 Provision of appropriate public transport systems, roads, airports, rail ports etc.					
	2.3 Provision of appropriate infrastructure (e.g. water, electricity, etc.)					
	2.4 Safety and security management					
	2.5 Road signage and information networks					
	2.6 Other (Please specify)					

LEARNING AND GROWTH FACTOR		1	2	3	4	5
		Not important	Some importance	Reasonably important	Very important	Extremely important
3. PEOPLE DEVELOPMENT	3.1 Skills training and education					
	3.2 Community tourism awareness programmes					
	3.3 Customer care programmes					
	3.4 Transformation Programmes					
	3.5 Entrepreneurial support programmes					
	3.6 Other (Please specify)					
4. SYSTEMS DEVELOPMENT AND USAGE	4.1 Integrated systems of information technology					
	4.2 Market research and intelligence					
	4.3 Computerised reservation system					
	4.4 Optimal utilisation of the Internet and other technology-based tools (e.g. CD Rom)					
	4.5 Other (Please specify)					

Please feel free to provide any further comments and/or suggestions regarding this study:

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Would you like to receive a summary of this study?

YES	NO

**THANK YOU FOR TAKING THE TIME TO COMPLETE THIS SURVEY.
YOUR INPUT IS MUCH APPRECIATED.**