Towards a model to enhance destination competitiveness: a Southern African perspective
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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 Southern Africa. Against this background, this paper will firstly focus on the potential role of tourism in addressing one of Southern Africa's key challenges, namely poverty alleviation. Thereafter the key observations made and lessons learnt from 26 stakeholder-involvement strategic planning processes that were facilitated for destinations in Southern Africa will be articulated. A sustainable destination competitiveness model will then be proposed that can be used as frame of reference to enhance Southern Africa's tourism competitiveness.

The well-known futurist, John Naisbitt, author 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, p. 104). 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, p. 19): "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$3575 billion, representing 10.8% of the total world product and generating 192 million jobs, representing 8% of total employment worldwide".

A key question that will be addressed 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 optimise 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 experiences--providing a major window of opportunity for destinations in Southern Africa. Unfortunately the sub-continent appears to be performing below its potential, particularly if the following statement contained in a 2002 World Travel & Tourism Council Report (WTTC, 2002, p. 4) holds true: "the region has the potential to become one of the world's great new destinations ... Although many of the strategic and operational pieces appear to be in place, insufficient focus on implementation has limited the return on investment and caused targets to be consistently missed". As will be indicated in this paper, this possible situation can be turned around through a shared vision, strong leadership, a coordinated effort among all stakeholders, and by addressing the key factors required to ensure sustainable international competitiveness as outlined in the proposed model.

Tourism as a Catalyst for Poverty Alleviation in Southern Africa

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

According to De Villiers (2002) annual growth of tourist arrivals in less developed countries 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 skilled 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 bring 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 (2002, p. 1) emphasises 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, often poor areas.

From the preceding perspectives it is apparent that tourism can be a key catalyst to alleviate poverty in Southern Africa and contribute to sustained growth, provided that the tourism sector at all levels (national, provincial, regional and local levels) becomes a strategic priority and is addressed in a sustainable and internationally competitive manner.

The Key Apparent Strategic Gaps and Constraints Impacting on Destination Competitiveness in Southern Africa

Since the late 1980s extensive research has been undertaken by Heath (1988) regarding the nature and extent of destination planning and marketing in Southern Africa. The overall objective of this research was to understand the extent to which planning processes were implemented, the constraints experienced as well as the needs and expectations of key public and private sector stakeholders at the community and regional destination levels. Based on the key findings of the initial research and guidelines derived from various apparent international best practices (Murphy, 1985; Prentice, 1993, Getz & Jamal, 1994; Simmons, 1994; Tosun, 2000), a participative planning and marketing framework was developed (Heath, 1989), tested and refined over time. During this period, 26 participative strategic planning processes have been facilitated at the local, metro, regional and provincial levels in Southern Africa (see Table 1). The implementation and evaluation of these case studies provide a sound qualitative base from which key observations can be made and which can serve as a frame of reference for future initiatives of this nature.

In the initial research conducted by Heath (1988), which has been reinforced in subsequent research, the following key situational factors appear to be prevalent in many destinations in Southern Africa (some of which have been addressed through the subsequent participative strategic planning processes that were implemented):

- Various fragmented and often uncoordinated efforts towards development and planning took place. In this regard there were also numerous development and marketing policy and planning reports available, which had in most instances not been implemented. The reasons put forward at the stakeholder work sessions, were mainly that:

- o Minimal consultation and participation of stakeholders had taken place, with the resultant lack of "buy-in" by stakeholders.
- o Previous plans and strategies had mostly not been situation-based or realistic and lacked practical guidelines for implementation.
- o A cursory evaluation of several of these documents indicated that lengthy background perspectives, SWOT analyses, and so forth were provided with extensive annexures. Minimal attention was however given to practical implementation guidelines that were based on the actual capacity (both human and financial) and situational realities of the respective destinations.

- In general there appeared to be a myopic and projectionist attitude among stakeholders (e.g., my hotel, my travel agency, our community, etc.). Other stakeholders and surrounding communities/regions were largely regarded as competition and/or threats. There was often a distinct divide between public and private sector stakeholders and an apparent antagonism between them. Tourism development and marketing was often regarded as two separate aspects of the destination. A key contributor to this phenomenon could be the fact that most institutional arrangements were according to separate development and marketing lines. An umbrella and coordinated strategic tourist-planning framework and structure was lacking in most cases that were studied.

- The approaches to marketing were often very fragmented and uncoordinated, with significantly varying perspectives on the concept of destination marketing. Marketing was in most instances regarded as primarily attending trade shows, advertising in selected media, and developing key marketing tools (mainly videos, brochures and maps). Key aspects such as market analysis, market segmentation, target marketing, branding, competitive positioning and goal-driven and measurable marketing campaigns as part of an overall umbrella strategic marketing plan were largely lacking.

- A lack of knowledge of the development and marketing initiatives of surrounding destinations was also apparent. Surrounding communities and regions were largely regarded as competition and as a threat. Furthermore, a clear understanding of the strategies and actions planned at provincial and national level was also mostly lacking. This proved to be a major constraint, as opportunities for linking into broader marketing strategies and campaigns were often missed.

- The philosophy of "structure should follow strategy" was not adhered to in most instances. As can be expected, personalities who had been entrenched in certain positions were often very sensitive to change as their positions could be placed in jeopardy. During the subsequent participative planning sessions it therefore became a major challenge to address the strategy issues before focusing on the institutional and organisational arrangements.

- A strategic approach was lacking in many instances. No concerted effort was made to continuously monitor and evaluate changes and developments in the macro, competitive and market environments; to established a shared vision and to formulate an umbrella development and marketing framework that could serve as "script" for all stakeholders to play their respective roles in a seamless and coordinated manner. The lack of such an agreed-upon framework "script" can be regarded as one of the key constraints inhibiting various destinations to optimise their true potential.

- A very basic, but important observation was that many stakeholders in the industry, who had often been working together for years, used the same terms, but attached different meanings to key terms (e.g., tourist, tourism industry, marketing, selling, FIT, etc.). A common understanding of the linkages between the respective components in the tourism value chain was also generally lacking.

- In spite of the fact that every community/region had tourism potential of a particular nature, many of these destinations were initially looking past their obvious and apparent strengths and attempted to emulate specific successful role model destinations. In some instances an "inferiority complex" appeared to be apparent. "Other" destinations were often perceived to be better and more successful.

- A key observation was that clear monitoring, evaluation and bench-marking mechanisms were largely lacking. So, for example, trade and consumer shows would be attended year after year at considerable expense without evaluating the cost-benefit of the exercise, relative to alternative marketing opportunities.
- A surprising, but consistent observation that was made in most instances was that there was a considerable communication gap between the community/region and the provincial/national tourism organisations and strategies. In many instances there was a perception of mistrust and a feeling that the provincial and national stakeholders had particular agendas and did not sincerely care about the issues and concerns at the local/regional level.

Implementing a Participative Strategic Planning Process--Lessons Learnt

Based on the preceding analysis and observations made, coupled to the evaluation of various international best practice experiences, participative planning processes and strategies were facilitated in the destinations referred to in Table 1. The key objectives of these processes are outlined in Table 2.

In spite of the successes that have been achieved in the destinations referred to in Table 2, the enabling environment that needed to be created by provincial and national tourism authorities was often perceived to be insufficient. A common view expressed in many of the destinations where the strategic planning processes were facilitated is that an inability to capitalise on opportunities and optimise the destination's potential was experienced. This was mainly attributed to:

- A lack of reliable and accessible information (e.g., Who are our current and potential targets? How do we evaluate and target them? etc.).
- A lack of sufficient knowledge and skills (e.g., How do we formulate our marketing plan? How do we decide on marketing tools? How do we package, brand and promote our destination? How do we coordinate effectively with surrounding areas? etc.)
- A lack of entrepreneurial support (e.g., How do we identify opportunities? How do we do feasibility studies and formulate a business plan? Who do we approach for finance and guidance? etc.).
- A general lack of continuous mentoring and support. Initiatives and enthusiasm in many communities/regions are often short lived due to insufficient continuous external guidance, support and encouragement.

A major challenge posed to provincial and national tourism structures was to support local and regional tourism destinations by providing:

- A clear and practical strategic marketing framework that outlines strategies and actions planned at the international, national and regional levels, and opportunities and conditions existing for local and regional tourism stakeholders to participate in these initiatives in an integrated and seamless manner.
- Relevant, timely and accessible market, competitive and macro intelligence and knowledge to facilitate decision-making and informed marketing strategy formulation at the local/regional levels.
- Education, training and capacity building programs regarding key issues such as tourism development, strategic planning, marketing strategy formulation, and so forth.
- Appropriate entrepreneurial support programs ranging from how to do a feasibility study and formulate a business plan to guidance on how to access and mobilise appropriate financial resources.

Table 1

Stakeholder-Involvement Strategic Planning Processes Facilitated for Destinations in Southern Africa

Destinations for Which Process was Facilitated	Key Outcome
Provincial Destinations	
1. Gauteng province	Strategic
2. Eastern Cape	Strategic
3. Western Cape	Strategic
4. KwaZulu-Natal	Strategic
Regional Destinations	
5. The Couga Region	Strategic and action
6. Graaff-Reinet and environs	Strategic and action
7. Upper Orange River and North Eastern Cape	Strategic and action
8. The Natal South Coast	Strategic
9. Timeless Africa Region of KwaZulu-Natal	Strategic and action
10. The Amatola Region	Strategic
11. The Uthungulu Region	Strategic and action
12. Lanatus Tourism Area	Strategic and action
13. Dolphin Coast	Strategic
14. Garden Route and Little Karoo	Strategic
15. Bushveld Region	Strategic
16. Magaliesburg Triangle	Strategic
17. The Ai-ais Richtersveld Transfrontier Conservation Area	Strategic
Metropolitan Destinations	
18. The Cape Metropolitan Region	Strategic and action
19. The Greater Durban Metropolitan Area	Strategic and action
20. The Nelson Mandela Metro (including Port Elizabeth)	Strategic
21. The Tshwane Metro (including Pretoria)	Strategic
Community-based Destinations	
22. Walvis Bay and Environs	Strategic and action
23. Port Elizabeth and environs	Strategic and action
24. Potchefstroom	Strategic and action
25. Cullinan and environs	Strategic
26. Barberton and environs	Strategic and action

Note   All the above strategic planning processes and the subsequent strategic planning frameworks and action plans were personally facilitated by the author. The observations made and conclusions drawn are therefore based on consistent first-hand interaction with the stakeholders and direct involvement with the respective implementation processes

Table 2

Key Objectives of the Participative Strategic Destination Planning Processes Implemented

Objectives
Identifying and evaluating tourism opportunities and threats in the changing environment that could impact on the future tourism development and marketing of the particular destination.
Evaluating the key strengths and weaknesses of the tourism attractions, infrastructure, services and marketing of the destination.
Evaluating the current and potential tourism markets and competitors for the destination.
Establishing a shared future tourism vision, mission, guiding principles and strategic goals for the destination.
Developing strategic guidelines with regard to the attractions, tourism infrastructure, services and marketing of the destination.
Developing guidelines with regard to the future organisation, coordination and financing of tourism in the destination.
Reaching consensus on the critical success factors to ensure sustained competitiveness for the destination.

It was argued that if higher-order tourism structures (e.g., provincial and national tourism development and marketing organisations) provided the preceding support and enabling environment, the energy, initiative, and entrepreneurship would emerge at the local and regional destination levels, positively impacting all levels. The philosophy and approach that was consistently supported was that of a national and provincial tourism development and marketing framework ("script"), which provided clear guidelines, parameters and support mechanisms for local and regional tourism organisations to play their key roles as "actors" in the overall "play" in a coordinated and seamless manner. A bottoms-up approach within an agreed-upon top-down coordinated framework, parameters and enabling environment was strongly advocated as was

the need for a comprehensive, integrated and implementable approach and model to ensure and sustain destination competitiveness.

The Rationale for Adopting an Integrated Competitiveness Approach to Tourism Destinations

An analysis of the literature indicates that 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 destination 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 directly; and by environmental factors--some of which may be influenced by public policy.

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" etc. 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, p. 23).

Hassan (2000, p. 240) describes competitiveness as "the destination's ability to create and integrate value-added products that sustain its resources while maintaining market position relative to competitors". He goes on to add a very important perspective that, given the diversity of industries that need to be involved in making destinations become competitive, it is essential to look beyond rivalry among firms.

Crouch and Ritchie (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 wellbeing 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 destination is not an end but a means to an end; its ultimate goal is to increase the standard of living of the people of the destination under free and fair market conditions.

On a practical level, a report released by the WTTC during July 2002 on the impact of travel and tourism on jobs and the economy in South Africa, 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

emphasises the importance of an integrated and sustainable competitiveness approach to optimise 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 and Tourism business, the strategic vision and leadership necessary to bring all the pieces together has not yet materialised. 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. (WTTC, 2002, p. 4).

The Development of an Integrated and Dynamic Model of Destination Competitiveness

From a Southern African perspective, the current models of destination competitiveness proposed by, among others, 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, is primarily based on the experience gained through the destination strategic planning processes facilitated in Southern Africa as outlined in Table 2. It also 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) 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.
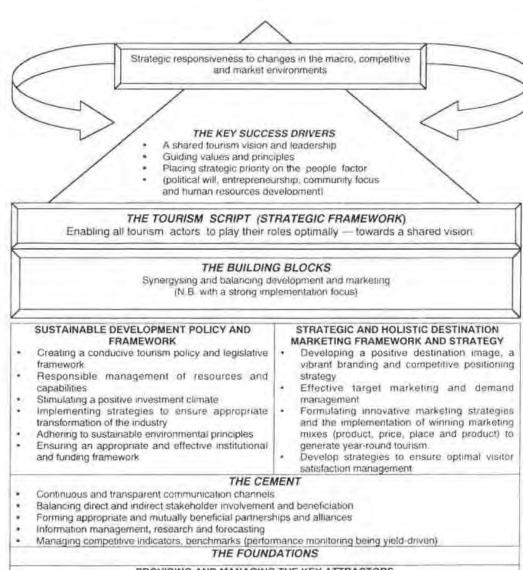
The Competitiveness Foundations

An analysis of leading "best practice" destinations and the literature indicated certain key foundation elements that are fundamental to sustained competitiveness. These elements 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 of 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: inherited (endowed) attractors and created attractors.

Inherited attractors. The inherited attractors can be divided into natural attractors (e.g., climate, flora, fauna, etc.) and cultural and heritage attractors. The natural attractors of a destination define the environmental framework within which the visitor enjoys the destination. They include physiography, climate, flora and fauna, which are crucial for many forms of tourism and visitor

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 TOURISM SCRIPT (STRATEGIC FRAMEWORK)
Enabling all tourism actors to play their roles optimally — towards a shared vision

THE BUILDING BLOCKS
Synergysing and balancing development and marketing
(N.B. with a strong implementation focus)

SUSTAINABLE DEVELOPMENT POLICY AND FRAMEWORK	STRATEGIC AND HOLISTIC DESTINATION MARKETING FRAMEWORK AND STRATEGY
• Creating a conducive tourism policy and legislative framework • Responsible management of resources and capabilities • Stimulating a positive investment climate • Implementing strategies to ensure appropriate transformation of the industry • Adhering to sustainable environmental principles • Ensuring an appropriate and effective institutional and funding framework	• Developing a positive destination image, a vibrant branding and competitive positioning strategy • Effective target marketing and demand management • Formulating innovative marketing strategies and the implementation of winning marketing mixes (product, price, place and product) to generate year-round tourism. • Develop strategies to ensure optimal visitor satisfaction management

THE CEMENT
- Continuous and transparent communication channels
- Balancing direct and indirect stakeholder involvement and beneficiation
- Forming appropriate and mutually beneficial partnerships and alliances
- Information management, research and forecasting
- Managing competitive indicators, benchmarks (performance monitoring being yield-driven)

THE FOUNDATIONS

PROVIDING AND MANAGING THE KEY ATTRACTORS
(e.g. history, culture, climate, events, business tourism, entertainment, etc.)
Optimising the comparative and competitive advantages and creating differentiation

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 for money, and linkages with surrounding destinations)

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

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

Figure 1

Towards a model for enhancing Southern Africa's sustainable tourism competitiveness.

satisfaction (Buckley, 1994). The culture and heritage attractors of a destination refers to its history, institutions, customs, architectural features, cuisine, traditions, artwork, music, handicrafts, dance etc., 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 is 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 Southern African context is the perspective provided by Hassan (2000), which indicates that major world-class destinations are increasingly diversifying 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 very 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 (World Tourism Organisation 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 United States (US)--is affecting both the volume and pattern of tourism flows throughout the world (Dwyer, 2001).

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, telecommunications, sewerage, health care facilities, sanitation, the electricity generation system, financial services and computer services. On a decision-making level tourist choice between alternative destinations is 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 Southern African context is capitalising 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) affects tourist experiences and that the availability of appropriate facilitators (e.g., airlines, accommodation, distribution channels, etc.) 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 and visitor bureaus. Tourism also relies on the provision of numerous ancillary services.

Related services infrastructure includes: retail shopping facilities, food stores, garages/car maintenance, petrol stations, pharmacies, bookstores, laundries, policing services, and so forth. 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 that 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; programs to objectively and subjectively monitor the quality of experiences provided; monitoring of resident attitudes towards visitors and towards development of the tourism sector.

The 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. 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 Crouch and Ritchie (1999) and Heath (2000).

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 specialisation, innovation, investment, risk taking, and productivity improvements. To this list we 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 specialisation" 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 Southern 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 is comprised of 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).

The 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 organisational structure that will most effectively guide and coordinate 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, p. 2). 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 organisational 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 organisation of tourism resources (Buhalis, 2000).

The primary function of the Destination Management Organization (DMO) should be to serve as a coordinating body for the many public and private sector organisations 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 many parts of the tourism sector work together and thus compete more effectively.

Two key rules of thumb regarding destination organisation is that "structure should follow strategy" and "the best organisational structure is the simplest one to get the job done" (Heath, 2000, p. 132).

A key aspect of any destination planning process is managing resources and capabilities by accessing both the adequacy and effectiveness of the attractors, the infrastructure and facilities, the services, and the programs 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 is an essential ingredient of longer-term competitiveness. 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 profitable opportunities. A destination's diversified portfolio of tourism products, services and experiences enhances 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 is also important. It is increasingly recognised and accepted that resources must be maintained and managed in an appropriate way to guard against undue deterioration and to facilitate their sustainability. As Hassan (2000) notes "sustainable development is critical to the conservation 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 development relies upon policies which support harmonious relationships among travellers, local communities, the private sector and governments to balance natural, built and cultural environments with economic growth and stability" (WTTC, 2001, p. 3).

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 coordination between public and private sector stakeholders and even less coordination 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 50 international destination marketing plans and strategies indicates 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" (Hassan, 2000, p. 240).

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. 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. Ritchie and Crouch (1993) have a similar view and emphasise 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, conscious of quality and value for money and considerably better informed.

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).

The 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, government departments, etc.); 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 maximise available resources, to create a synergistic marketing thrust, and to enhance competitiveness. Go et al. (2000, p. 87) claim "partnerships, including private and public sector collaboration between destinations, is a prerequisite to maintaining destination competitiveness". Buhalis (2000, p. 113) states that "partnerships between public and private sector and close cooperation 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 organisations in both the private and public sectors.

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 bench-marked and monitored include tourism demand, tourism employment, tourism performance and tourism exports.

Strategic Responsiveness to Changes in the Macro, Competitive and Market Environments

As part of the ongoing 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.

Conclusion

A new era is dawning for tourism in Southern 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 cooperation and coordination 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) 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 paper.

In a recent World Bank report, the question was posed whether Africa can claim the 21st 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 a Southern African 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 Southern Africa in terms of achieving its true tourism potential lies with the people of the sub-continent. For Southern Africa to achieve its true potential, public and private sector stakeholders will need to:

- appreciate the sub-continent's true tourism potential
- develop a shared tourism vision
- coordinate efforts in addressing the strategic tourism challenges in the region
- invest adequately in appropriate tourism development and marketing
- strategically manage the key elements that constitute destination competitiveness as outlined in this paper.

The stakeholders of the sub-continent could enter the first decades of this millennium with a new sense of pride and economic well-being, knowing that they are building part of their economic future on a sustainable resource base in which the sub-continent has a global competitive advantage.

In conclusion, the words of Arther Costa, co-author of Creating the Future, are very relevant: "The best way to predict the future is to invent it now!" (Costa, 2002, p. 2) and in the words of the Poet: "Man's reach must exceed his grasp or what is heaven for?".

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