

A STRATEGIC PLANNING MODEL FOR PROVINCIAL TOURISM AUTHORITIES

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SUMMARY

The purpose of this study was to develop a strategic tourism-planning model for provincial authorities. In order to achieve this goal, a literature study was firstly necessary to determine the important aspects identified for strategic tourism planning by researchers working in that field. Secondly, the nine provinces were asked to forward their existing provincial strategic tourism plans. Only five of the nine provinces complied with this request. These five provincial strategic plans were compared, to identify those aspects which the provinces perceive as important for the present tourism industry, and to identify the aspects which they incorporate in their strategic plans. This was done in Table 3.2.

Before investigating and evaluating the present strategic plans, criteria had to be identified for this purpose. The White Paper on Tourism (1996) identified ten key success factors for provinces to achieve. In Table 3.3 these ten key success factors were applied as criteria to evaluate the five existing provincial strategic tourism plans.

From the literature study eleven key strategic elements for provincial tourism were identified. These were discussed in chapter 2. In Table 3.4 the five existing provincial strategic tourism plans were evaluated against the above eleven key strategic elements.

It was shown that a tourist's decision and the unique tourism circumstances (attractions) of the provinces' natural resources (including the "Big Five" tourism attractions) are very important to a strategic tourism plan and that it had to be included in the proposed provincial strategic tourism planning model.

A questionnaire including the above aspects and elements was compiled. The objective of the questionnaire was to measure the importance which the nine provinces attach to the identified elements. Questionnaires were sent out to the nine provinces, for them to complete and return. A 100% response rate was achieved. The results of the questionnaire were discussed in line with the eleven key strategic elements. From the results the following conclusions can be made:

In their strategic plans provincial tourism authorities focussed primarily on marketing.

All nine provinces rated safety and security as important and felt that it should be included in a provincial strategic tourism plan. On the other hand, aspects such as staff training, women in tourism, providing for disabled people in tourism, secondary services, health-related issues, provinces' natural resources (biomes), provinces' involvement in new tourism business and globalisation got low ratings. Safety and security and the promotion strategy received the highest average ratings (96%).

This study concluded with a number of recommendations, of which the following are the most important:

- To implement the proposed provincial strategic tourism planning model.
- To research practical actions that can be implemented to protect tourists against criminal elements while visiting a province.
- To research how the quality of service can be improved in a province's tourism industry.

OPSOMMING

Die doel van hierdie studie was om 'n strategiese toerismebeplanningsmodel te ontwikkel vir provinsiale owerhede. Om hierdie doel te bereik, is daar eerstens 'n literatuurstudie gedoen om vas te stel watter belangrike aspekte vir strategiese toerismebeplanning geïdentifiseer word deur navorsers op daardie gebied. In die tweede plek is die nege provinsies gevra om hulle bestaande provinsiale toerismeplanne aan te stuur. Slegs vyf van die nege provinsies het aan hierdie versoek voldoen. Hierdie vyf provinsiale strategiese planne is vergelyk, om die aspekte te identifiseer wat hulle as belangrik beskou vir die huidige toerismebedryf, sowel as die aspekte wat hulle in hulle strategiese planne inkorporeer. Dit is gedoen in Tabel 3.2.

Voordat die huidige strategiese planne ondersoek en geëvalueer kon word, moes daar kriteria gevind word vir hierdie doel. Die Witskrif vir Toerisme (1996) identifiseer tien sleutelsuksesfaktore wat die provinsies moet bereik. In Tabel 3.3 is hierdie tien suksesfaktore toegepas as kriteria om die vyf bestaande provinsiale strategiese toerismeplanne te evalueer.

Uit die literatuurstudie het elf sleutel strategiese elemente vir provinsiale toerisme na vore gekom. Dit is bespreek in hoofstuk 2. In Tabel 3.4 is die vyf bestaande provinsiale strategie toerismeplanne geëvalueer teen die bestaande elf sleutel strategiese elemente.

Daar is aangetoon dat 'n toeriste se besluit en die unieke toerisme-omstandighede (attraksies) van die provinsies se natuurlike hulpbronne (insluitend die "Groot Vyf" toeriste-attraksies baie belangrik is vir 'n strategiese toerismeplan en dat dit in 'n voorgestelde provinsiale strategiese toerismebeplanningsmodel ingesluit moet word.

'n Vraelys wat die boonste aspekte en elemente insluit, is opgestel. Die doelstelling daarmee was om te bepaal watter waarde die nege provinsies heg aan die geïdentifiseerde elemente. Vraelyste is na die nege provinsies uitgestuur, sodat hulle dit kon invul en terugstuur. Daar is 'n 100% reaksie ontvang. Die resultate van die

vraelys is bespreek in die konteks van die elf sleutel strategiese elemente. Uit die resultate kan die volgende gevolgtrekkings gemaak word:

In hulle strategiese planne het provinsiale toerisme-owerhede hoofsaaklik op bemerking gefokus. Al nege provinsies het veiligheid en sekuriteit as belangrik geag en gevoel dat dit in 'n provinsiale strategiese toerismeplan ingesluit moet word. Aan die ander kant is daar nie veel waarde geheg aan aspekte soos personeelopleiding, vroue in toerisme, voorsiening vir gestremdes in toerisme, sekondêre dienste, gesondheidsverwante sake, die provinsies se natuurlike hulpbronne (biome), provinsies se betrokkenheid in nuwe toerisme-ondernemings en globalisering nie. Veiligheid en sekuriteit en die promosiestrategie het die hoogste gemiddelde puntetoekenning gekry (96%).

Die studie sluit af met 'n aantal voorstelle, waarvan die volgende die belangrikste is:

- Om die voorgestelde provinsiale strategiese toerismebeplanningsmodel te implementeer.
- Om praktiese optrede na te vors wat geïmplementeer kan word om toeriste te beskerm teen kriminele elemente terwyl hulle 'n provinsie besoek.
- Om na te vors hoe die gehalte van diens verbeter kan word in 'n provinsie se toerismebedryf.

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CHAPTER 1

INTRODUCTION

1.1 MOTIVATION

The success of the 1994 election opened South Africa's tourism doors to the world (Brynard, 1995). Although the tourism industry is the single largest industry in the global market (White paper on Tourism, 1996:1) and the fourth largest in South Africa (WTTC, 1995; SATOUR, 1994), the majority of existing tourist destinations have not yet developed as such. It is therefore in the best interest of all the provinces to establish deliberate management effort based on collaboration between all role players to transform the tourism industry (Tourism Master Plan Steering Committee, 1998:xiii).

South Africa needs funding for its Reconstruction and Development Programme (RDP). At the same time South Africa is also a country with much undeveloped tourism potential. If tourism is developed and managed maximally on provincial level, the funds generated from it can have a significant effect on the provinces' revenue and RDP (Tourism Master Plan Steering Committee, 1998:xiv). Inskeep (1991:31), on the other hand, warns that the development of tourism resources must be done with great care and with realistic expectations of its result. Brohman (1996:49) places emphasis on the design of tourism strategies that call for increased community involvement and more co-ordinated state involvement in tourism planning to serve broadly-based development goals, such as job creation and the development of tourism-related industries with in specific communities.

Tourism in South Africa is currently perceived as underdeveloped in comparison with the global tourism industry. However, certain industries within tourism are well-developed, such as the travel and accommodation industry. At this stage the tourism industry in South Africa is centred on a few natural (Table Mountain, Coastline, Kruger National Park, Drakensberg) or man-made attractions (Sun City / Lost City, Casino resorts, Cultural venues) which are situated in a few provinces. These provinces have used these attractions to their financial and social benefit. The other

provinces will have to develop their tourism potential to its capacity within an environmentally sensitive framework.

To change a province's tourism industry into a profit industry it is necessary to analyse, understand and then to make changes within the industry to minimise the threats and to maximise the opportunities (Inskeep, 1991:51). The progress towards a market economy (tourism) is obstructed by the phenomenon that privatisation is as much a political process as an economic one (Tribe, 1995:15). According to Inskeep (1998:15) tourism is central to the process of planned economic change, as it cuts across a variety of economic sectors and it should be used to the benefit of the local communities and the relevant province. At present all local authorities must, according to legislation, draw up and implement an Integrated Development Programme (IDP) that includes all aspects at local authority level. The planning of the IDP's are community driven.

1.2 DEFINITION OF PROBLEM

Inskeep (1991:15) emphasises the great potential of tourism to increase a country's employment, small business development, income and foreign exchange. This has, however, not been realised as an economic force in South Africa because of several reasons, including the fact that tourism has not been seen by all government levels as a priority (Implementation guidelines for the national tourism policy of South Africa, 1996:4). Other aspects that hamper tourism growth and development are poor service, violence, lack of trained staff, lack of long-term planning and lack of a vision for tourism at the provincial and local levels (SATOUR, 1998; Saayman, 1996(a); Saayman & Van der Merwe, 1996; Cloete, 1995).

Tourism can become South Africa's biggest industry if it is managed strategically as a profit industry and as an agent of change in the Province (Fletcher & Cooper, 1996:182; Deloitte & Touche, 1992:13). The White Paper on Tourism (1996:8) summarises this situation in the following terms: "Unless tourism is seen as strategically important to the economy of South Africa and unless the necessary plans, policies, actions and resources to support this initiative are put in place, the tourism industry will continue to be a missed opportunity.' It is furthermore important for provinces to work together to spread the benefits of economic growth and social

development across the various provinces (Fagence, 1996:717; SATOUR, 1992; Goslin, 1991:31). This will lead to a situation where South Africans as well as international tourists can experience what the country has to offer. Currently this is not the case. Research by Saayman (2000) showed that only three provinces benefit economically from tourism in South Africa. They are the Western Cape, KwaZulu Natal and Gauteng.

These findings have major implications for planning in the tourism industry. One of the implications is that leakages need to be addressed before a province can benefit from tourism at all. Other important issues that need to be addressed in the provinces are the implementation of the objectives the White Paper on Tourism (1996) of developing Small, Medium and Macro Enterprises (SMME) and black empowerment in the tourism industry. Certain provinces already have strategies to address this. These strategies are also endorsed by national frameworks, for example by a transformation strategy. A critical aspect of this process is that the provincial authorities in many cases are the implementing bodies of national initiatives. The most appropriate way for all provinces to benefit equally from the growing tourism market is by implementing a strategic planning model that can cater for their specific circumstances. Such a strategy will have to address the above gaps and to aspire to meet the mission and aims as set out for provincial tourism development in South Africa by the White Paper (1996).

Du Preez (1989:2) points out that in the next two decades facets such as more competition, social change, decrease in productivity, progressive decline in the natural resources and the rising costs of these will emphasise the need for any industry to apply strategic planning. It will enable them to manage themselves in an uncertain, ever-changing environment. Coupled with this is the reality of globalisation. A higher demand for tourism, especially ecotourism, and sustainability emphasises the importance of strategic planning in order to balance tourism development with the carrying capacity (environmental impact) of natural resources for which South Africa is well-known (SATOUR, 1999; Saayman, 1996 (b); Kroon, 1994; SATOUR, 1994). Therefore it is not just an ever-changing external and internal environment that motivate organisations to plan, but also the need to protect resources (economic, environmental and social) (Pearce & Robinson, 1994; Inskeep,

1991; Kreitner, 1986). It is in this regard that the different provinces will have to implement new initiatives.

Brohman (1996:49) indicates that particular emphasis should be placed on the design of alternative tourism strategies that call for increased community participation and more co-ordinated state involvement in tourism planning, to serve broadly based development goals. A national tourism policy, the White Paper on Tourism, has been put forward by the government to spearhead tourism development in South Africa.

The provinces now have to use the White Paper on Tourism to formulate and implement a strategic plan for tourism in their respective provinces. A uniformed strategic planning model can be implemented but it will have to address the diversity of the nine provinces. For a strategic plan to be successful it needs the support and encouragement of all product owners and interested parties (Holtzhausen *et al.*, 1991; Inskeep, 1991:29; McIntosh & Goeldner, 1990). Below *et al.* (1989:3) describe strategic planning as "the process that builds organisation-wide belief and commitment to the strategic plan because the participants have ownership. It is also the process that helps to ensure implementation of the plan". A strategic planning model that could be implemented by all nine provinces will have to address the imbalances of tourism development between the provinces, black empowerment and SMME's and it must incorporate the objectives and visions of the White Paper on Tourism (1996).

According to the Municipal Systems Act 32 (2000) and the Constitution of the Republic of South Africa (1996) the responsibility of tourism development are being delegated to local governments. At present this cannot be done because all local governments are in the process of planning and implementing Integrated Development Programme (IDP) that will be implemented on a long- term (five year plan) basis (Municipal Structures Act 117, 1998).

This situation will force provinces to continue with their tourism plans for the time being. When the local governments take over tourism at local level, the functions as delegated to the provinces will be taken over by them. This strategic planning model will be such as to serve their specific tourism planning needs.

The main question that this thesis will attempt to address therefore is:

Which strategic planning model is suitable for the development of tourism at provincial level (authorities)?

1.3 AIMS OF THE STUDY

The following **primary aim** must be achieved by the study.

- To develop a strategic tourism planning model for provincial authorities.

Secondary aims are:

1. To identify the key strategic elements that have to be part of strategic tourism planning.
2. To do a literature study of relevant sources to show the need and importance of each identified key element for strategic tourism planning.
3. To identify the importance and influence which a tourist decision has on strategic tourism planning.
4. To discuss the provinces' unique tourism circumstances (attractions) pertaining to the ecology, including the provinces' "Big Five" tourism attractions.
5. To extract relevant information from the existing national strategic tourism plan (White Paper on Tourism, 1996) regarding provinces' responsibilities towards tourism development on provincial level.
6. To evaluate the five existing provincial strategic tourism plans according to the ten success factors, as put forward by the White Paper on Tourism (1996).
7. To evaluate the five existing provincial strategic tourism plans according to the eleven key strategic elements discussed in chapter 2.
8. To determine the similarities and differences between the five existing provincial strategic tourism plans.
9. To distribute questionnaires to the nine provinces to ascertain the status quo of provincial tourism and to get their reaction on identified tourism elements and aspects.
10. To interpret the results of the questionnaire in the context of the eleven key strategic elements (chapter 2) and the results of Table 3.3 and Table 3.4 (Chapter 3).

Schematically the above primary and secondary aims will be discussed and organised in different chapters, as indicated in Figure 1.1.

PRIMARY AIM

Develop a strategic tourism planning model for provincial authorities.

CHAPTER 5

SECONDARY AIMS

CHAPTER 2

1. Identify the key strategic elements that should be incorporated in strategic tourism planning.
2. Do a literature study of relevant sources, to show the need and importance of each identified key element for strategic tourism planning.
3. Identify the importance and influence of a tourist's decision on strategic tourism planning.
4. Discuss the provinces' unique tourism circumstances (attractions) pertaining to the ecology, including the provinces' "Big Five" tourism attractions.

CHAPTER 3

5. Extract relevant information from the existing national strategic tourism plan (White Paper on Tourism, 1996) regarding provinces' responsibilities toward tourism development on provincial level.
6. Evaluate the five existing provincial strategic tourism plans according to the ten success factors as put forward by the White Paper on Tourism (1996).
7. Evaluate the five existing provincial strategic tourism plans according to the eleven key strategic elements discussed in chapter 2.
8. Determine the similarities and differences between the five existing provincial strategic tourism plans.

CHAPTER 4

9. Distribute questionnaires to the nine provinces to ascertain the status quo of provincial tourism and get their reaction on identified tourism elements and aspects.
10. Interpret the results of the questionnaire's in the context of the eleven key strategic elements (chapter 2) and the results of Table 3.3 and Table 3.4 (chapter 3).

FIGURE 1.1: Primary and secondary aims discussed in the different chapters

1.4 METHOD OF RESEARCH

This study is based on a literature study as well as a survey. The literature study will focus on the following themes: strategic planning, strategic marketing, tourism management, tourism planning, tourism development, tourism policies, tourism legislation, tourism, plan, model, province, quality and quantity. A search was done in the following databases to locate all the relevant studies, books and articles on strategic planning and management in tourism:

- RSAT - Repertorium van Suid-Afrikaanse Tydskrifartikels.

- SSI - Social Science Index.
- ABI / Inform.
- Environment Abstracts.
- DAI - Dissertation Abstracts International.
- Sport Discus.

At the same time the national and provincial trends in tourism as well as the White Paper on Tourism (1996), the implementation document on the White Paper (1996) and provincial policies will be analysed so that the relevant aspects can be incorporated into the strategic planning model. Letters (Annexure A) were sent to the nine provincial tourism authorities to obtain their existing organograms and strategic tourism plans, corporate plans or long term plans (whatever term they used). Five provincial strategic plans were received. A telephonic follow up was done one month after the fifth strategic plan was received. It became clear that all the provinces did not have a provincial strategic plan in place. That may explain why the other four did not send their plans.

The **survey** was done by sending questionnaires to the nine provinces' tourism authorities to obtain their input on identified key strategic elements and relevant aspects to be included in a provincial tourism strategic planning model. The questionnaire measured the importance (weight) which a province attached to these identified key strategic elements and aspects of tourism. South Africa's nine provinces each have its own tourism authority which manages tourism in that province.

In light of the above and because of the size of the identified group (only nine provinces) it was decided to send the questionnaire to all nine provinces.

The process of sending the questionnaires and receiving the answers was as follows. Firstly, the nine provinces' tourism organisations were contacted by telephone to obtain the contact details of the relevant person to complete the questionnaire. Secondly, the questionnaire (Annexure C) and a cover letter (Annexure B) were sent to the relevant persons at the provinces per facsimile. One month was allowed for the questionnaire to be completed and returned per facsimile. Thirdly, after the month expired, the provinces that did not respond were contacted. Some indicated that they did not receive the questionnaire and it was sent to them

again. Others were given to the wrong people (although it was marked for a specific person's attention). This process began in July 2000 and the last questionnaire was received in March 2001. A 100% response was received from the nine provinces.

The candidate and Prof. M. Saayman of the Potchefstroom University for CHE jointly drew up the questionnaire and processed and analysed its results.

1.5 DEFINITION OF TERMS

The following terms are used throughout the study and therefore it needs defining.

1.5.1 STRATEGIC PLANNING / MODEL

Levicki (1996:8) defined strategic planning as: "...a set of objectives for any organisation, whether it is in the public or private sector and has commercial or non-profit status. Strategy sets the objectives and the goals of the organisation into a series of time frames to enable people to know what must be achieved and by when. The process of strategic analysis looks at the external environment of the organisation and the internal strengths and weaknesses. The strategist then assembles the data to develop the objectives which will maximise opportunities for the organisation."

According to Cloete (1995:8) strategic planning is the determining of the changes within an organisation's environment, composition and developing of long term planning, action steps, the application of resources and using planned methods of control to evaluate achievements.

Donnelly *et al.* (1995:183) describe strategic planning as: "... a process that involves the review of market conditions; customers' needs; competition strengths and weaknesses; social-political, legal and economic conditions; technological developments; and the availability of resources that lead to the specific opportunities or threats facing the organisation".

Strategic planning makes this possible by taking cognisance of an organisation's internal (strong and weak points) and external (opportunities and threats) environment, to constantly guide the organisation to the development of new markets

with the biggest opportunities to effectively produce and sell products or services for a profit (Kroon, 1994:170).

The essential ingredients to success are observation, learning and adaptation. Watson (1993:26) describes strategic planning as “the art of developing plans that deploy the focused capabilities and competencies of an organisation against a recognised competitive environment in a manner that provides the maximum support for the leadership’s policy and allows flexibility to permit those real-time adaptations necessary for achieving evolutionary success”.

The above definitions have the following to offer towards an integrated strategic planning definition:

- support leadership policy;
- determine changes in an organisation's environment (internal and external (Strong and Weak points, Opportunities and Threats (SWOT)));
- guide organisation to the development of new markets with biggest opportunities;
- composition and developing of long-term planning;
- set objectives and goals for any organisation, public or private sector, in time;
- formulate and implement action steps;
- using pre-planned methods of control to evaluate achievements, and
- application of resources.

For the purpose of this study the following integrated strategic planning definition will be applicable:

Strategic planning is a plan that supports leadership policy, determine changes in the organisations environment (SWOT) and then guide the organisation to develop new markets with biggest opportunities and least threats. A long-term plan has to be compiled and developed by setting objectives and goals in time, formulate and implement action steps, apply resources and have constant control and evaluation of achievements.

1.5.2 TOURISM INDUSTRY

Tourism is an all-encompassing industry that is defined differently by every country to suit their specific tourism needs (Smith, 1995). That is the reason why so many

definitions for tourism exist. The following definitions have been selected in an attempt to summarise the essence of what tourism means for the purpose of this study.

Gunn (1994) said that the tourism industry encompasses all travel, with the exception of commuting. SATOUR's (1991:47) definition also includes travel as one of the main aspects of tourism. According to SATOUR (1991:47) "... tourism includes any activity concerned with the temporary short term movement of tourists to destinations outside the place where they normally live and work".

On the other hand, Mawhinney and Bagnall (1976:385) and Swart (1997:9) agree that tourism is seen as an industry similar to other industries, for example mining and agriculture, which are dependent on the continuous availability of the relevant resources.

McIntoch and Goeldner (1990:4) and Cloete (1995:9) conclude that tourism is a comprehensive industry that is dependent on the relevant resources. They point to the relationship and interaction between tourists, businesses, government and local communities. Saayman (1996(b)) concurs with the above authors about tourism but he goes further by pointing out that the success or failure of tourism depends on careful management.

Butler (1993:29) defines tourism as follows "... tourism which is developed and maintained in an area (community, environment) in such a manner and at such a scale, that it remains viable over an indefinite period and does not degrade or alter the environment (human and physical) in which it exists to such a degree that it prohibits the successful development and well-being of other activities and processes."

The following aspects of tourism have been derived from the above definitions:

- It is an all-encompassing industry.
- Tourism encompasses all travel.
- Tourism is dependent on the continuous availability of the relevant resources.
- It includes the relationship and interaction between tourists, businesses, government (three tiers) and local communities.

- The success or failure of tourism depends on careful management.
- It must be developed and maintained so that it remains viable over an indefinite period.
- It should not degrade or alter the environment (human and physical).

For the purpose of the study the following integrated definition for tourism will be applicable:

Tourism is an all-encompassing industry (travel, catering, hospitality, resorts, recreation, business, etc.) that is dependent on the availability of the relevant resources, relationships and interaction between tourists, business, government (three tiers) and local communities.

1.5.3 ELEMENTS

Dictionaries offer the following definitions of *elements*:

The Oxford Dictionary (Pollard *et al.*, 1995:43) defines *elements* as "the basic or elementary principles of a subject" and *element* as "any of the parts that make up a whole".

The World Book Dictionary (Barnhart *et al.*, 1975:674) defined *element* as "one of the parts of which anything is made up".

According to the Dictionary of Contemporary English (Longman Group, 1987:329) define *elements* are "the first or most simple thing one has to learn about a subject", while an *element* is "a part of a whole".

For the purpose of this study *elements* are defined as follows:

The basic or elementary parts of Strategic Tourism Planning.

1.5.4 DEVELOPMENT

Dictionaries define *development* in the following ways:

The Cambridge International Dictionary (Procter, 1995:377) states that *development* is "... a recent important event which is the latest in a series of related events". Procter (1995) also defines *development area* as "... an area of high unemployment

in which the government encourages new industries to start so that more jobs will be created".

In the Oxford Advanced Learners Dictionary (Hornby, 1995) *development* is described as "... the action of a process of developing or being *developed*".

For the purpose of this study *development* is defined as follows:

Tourism *development* is an area in which government encourages new tourism businesses to start so that more jobs could be created.

1.5.5 SUSTAINABILITY

Sustainability is defined by McIntosh *et al.* (1995:374) as an approach that holds out the promise of maintaining a standard of living somewhat similar to that which communities possess today, while recognising that communities cannot continue to exploit the global environment as they have in the past.

Myburgh and Saayman (1999:86-87) describe *sustainable* development as a process which allows development to take place without degrading or depleting the resources which make the development possible.

The Cambridge International Dictionary (Procter, 1995:1472) defines *sustainability* as follows:

- "it is able to continue in its present form"
- "a way of using natural products so that no damage is caused to the environment"

According to the Oxford Advanced Learners Dictionary (Hornby, 1995) sustainability is "... that [which] can be kept going or maintained".

In the Oxford Dictionary of New Words (Knowles & Elliott, 1997) *sustainability* is defined as follows:

Sustainability sees tourism within destination areas as a triangular relationship between host areas and their habitats and peoples, holidaymakers, and the tourism industry ... Sustainable tourism aims to reconcile the tensions between partners in the triangle, and keep the equilibrium in the long term.

The above definitions and descriptions are combined by McNeely *et al.* (1994:10) and three main principles of sustainable development are derived from it:

- Ecological sustainability ensures that development is compatible with the maintenance of essential ecological processes, biological diversity and biological resources.
- Social and cultural sustainability ensure that development increases people's control of their lives, is compatible with the culture and values of people affected by it, and maintains and strengthens community identity.
- Economic sustainability ensures that development is economically efficient and that resources are managed so that they can support future generations.

For the purpose of this study the following definition of sustainability by Myburgh and Saayman (1999:90) is accepted:

Sustainable tourism is defined as a model of economic development that is designed to:

- improve the quality of life of the host community;
- provide a high quality of experience for the visitor, and
- maintain the quality of the environment on which both the host community and the visitor depend.

1.6 CHAPTER ORGANISATION

In chapter 2 the key strategic elements will be identified and a literature study will be presented to prove the need and importance of each identified key element. The importance which a tourist's decision has on tourism and the impact tourism has on a province's economy, environment and society will be indicated.

Chapter 3 will discuss the provinces' unique tourism circumstances (attractions) pertaining to the ecology, including the provinces' "Big Five" tourism attractions. Relevant information will be extracted from the existing national strategic tourism plan (White Paper on Tourism, 1996) regarding provinces' responsibilities toward tourism development on provincial level. The five existing provincial strategic tourism plans received will be evaluated according to the ten success factors identified by the

White Paper on Tourism (1996) and the eleven key strategic elements. The similarities and differences between the five existing provincial strategic tourism plans will be identified.

In chapter 4 results of the questionnaire completed by the nine provinces will be discussed. It will be evaluated according to tourism key elements identified in chapter 2, and measured against the national tourism strategy and existing provincial strategic tourism plans in chapter 3. Chapter 5 will offer conclusions of the study and recommendations for a provincial strategic tourism planning model.

CHAPTER 2

ELEMENTS OF STRATEGIC TOURISM PLANNING

2.1 INTRODUCTION

Tourism is a multifaceted industry (Lickorish & Jenkins, 1997:1; Heath, 1987:12; Mathieson & Wall, 1982:14). The reason for this is the multitude of different elements that have an influence on the tourism output. According to SATOUR (South African Tourism Board, 1991:1) tourism is a dynamic activity that is constantly changing to cater for new and changing needs, and as such it requires flexibility to adjust to change. The only way to achieve flexibility while still being able to succeed in the tourism industry is through planning. Although there may be resistance to the concept of planning, it is generally accepted as being a valid approach to guiding future development, rather than “just letting things happen” (Inskeep, 1991:26).

Gunn (1994:5) remarks that: “There is a prevailing misconception that tourism is an industry. Instead it is an agglomeration of land development and programs designed to meet the needs of travellers.” In chapter one this statement by Gunn is contradicted by various writers. These writers maintain that tourism is an industry. For the purpose of this study tourism is perceived as an industry.

As a multifaceted industry, tourism is provided by a variety of suppliers. Rogers and Slinn (1993:12) categorise these suppliers into two major categories, namely profit orientated and non-profit orientated. Profit orientated suppliers are mostly found in the private sector and are influenced by factors such as the ease of formulation, availability of financial resources and requirements, taxation, legal constraints, changing customer needs (globalisation), management skills, motivation and personal objectives of those involved. Examples of profit orientated organisations are sole proprietorships, partnerships, private limited companies, public limited companies and franchises.

The second category is non-profit orientated (public sector) organisations. These are companies or organisations that provides a service at no or low cost. This category is influenced by the same factors as those mentioned above. Examples of these types of organisations or groups are charities and trusts, co-operatives, public

corporations, non-governmental organisations (NGO's), national, provincial and local government.

Saayman (2000:10-16) further divides the tourism industry into primary and secondary tourism aspects.

Primary tourism aspects have a major effect and are very important for the success of tourism in a province. These aspects are:

- **Accommodation** (including hotels, guesthouses, bed-and-breakfast establishments, holiday resorts, caravan parks, game reserves, and game farms) and catering (including restaurants, coffee shops, shebeens, informal bars).
- **Transport** (including ships, bikes, motorcars, aeroplanes, taxis, buses and trains). Transport needs include accessibility of attractions, availability of transport, route maps and road signs.
- **Entertainment.** McIntosh *et al.* (1995) and Trigg (1995) identify the following as entertainment: gambling, festivals, visiting friends and relatives, picnic spots, shopping centres, public parks and markets.
- **Attractions and culture.** According to the White paper on Tourism (1996) attractions can be natural (including beaches, caves, rivers, lakes, mountains, and fauna & flora) or man-made (including museums, game reserves, zoos, cultural heritage, cathedrals, churches, archaeological sites, ancient monuments, historical gardens, steam trains, garden centres, amusement parks picnic sites, waterfront developments and marinas (Swarbrooke, 1995:5)).

Most of the above enterprises are completely dependent on the tourism industry / market.

Secondary aspects have an indirect, yet determining influence on the tourism industry. They include:

- Legislation;
- marketing and information;
- training and education;
- politics;

- private and public sector;
- sociology;
- psychology;
- anthropology;
- geography and
- demography.

Based on the above the objectives of this chapter are:

- To identify the key strategic elements that have to be part of strategic tourism planning.
- To do a literature study of relevant sources to show the need and importance of each identified key element for strategic tourism planning.
- To identify the importance and influence which a tourist's decision has on strategic tourism planning.

2.2 IMPACT OF TOURISM

According to Inskeep (1991:26) tourism development cannot take place without being planned. There for the following discussion on tourism is important to understand the diversity of tourism and the elements that have to be considered when dealing with tourism. It is also important to show which elements need to be addressed within a strategic plan for it to have a significantly positive influence on the tourism industry (SATOUR, 1991:6).

The next component is equally important to the tourism planning process because the impact of tourism on an area, community or the economy (micro or macro level) can prohibit or motivate a tourism related development, trip or holiday.

Tourism is about people away from their usual habitat and about the impact they have on the economic, environmental and social well-being of their hosts (Mathieson & Wall, 1982:1). The impact of tourism on the economy, society and the environment is important when drawing up a strategic plan for a province because of the sustainability of tourism. Sustainability is directly influenced by the level of positive or negative impact which tourism has on a province, region or areas of the economy, society and environment. For the purpose of this study all three impact areas

(economic, social and environmental impacts) are equally important and should be taken into consideration from the start of strategic tourism planning until its implementation. Each of these areas will be discussed in more detail below.

2.2.1 ECONOMIC IMPACT

Inskeep (1991:368) is of the opinion that to ascertain the complete economic impact of tourism on an area, region, province or country, it is necessary to analyse the international economic impact on that specific area, determining balance of payments as well as tourism and foreign exchange earning. The impact of tourism and foreign exchange earning in a specific area is determined by evaluating the multiplier analysis, economic multiplier, leakages, contribution to government revenues, job opportunities, generation of income for regional development, tourism and entrepreneurial activity. Tourism activity can be divided into length of stay, money spent at a destination, economic multiplier and number of tourists visiting a destination / country.

When planning tourism it is imperative to keep the economic cost of tourism in mind, for example the over-dependence on tourism, inflation, influence on land values, seasonality and external costs. According to Myburgh and Saayman (1999) concentrated tourism activities could lead to the disturbance of plants, wildlife and other resources as well as the erosion of the environment. These factors often lead to actions taken to decrease the number of tourists visiting the attraction, for example high entrance fees at game parks, limited accessibility by means of gravel roads and marketing of less known attractions, which decrease the economic benefits of tourism for a certain area.

Harrison (1992) divides the economic impact on tourism into three phases, namely:

- **Direct expenses:** These include goods and services provided by hotels, resorts, guesthouses, restaurants and other tourism-related facilities.
- **Indirect expenses:** This is a second phase resulting from direct expenses, such as transport costs.
- **Induced expenses:** This is the result of the re-expenditure of income by the local community to their own advantage.

The economic impact of tourism is not just on a macro level. The local community can be adversely or positively affected, depending on the following (Saayman, 2000:127; Harrison, 1992):

- The developments must be undertaken with equity in mind.
- The developments must be planned and managed in such a way that the natural environment is protected for future generations.
- With the planning of tourism developments possible co-operation and linkages with other economic sectors must be established.
- Involvement of the local community in the planning of the project is important.
- Local labour should be used in the construction phase to make sure that the local community benefits from the development.
- Building material and equipment should be bought locally.
- Local community members must be employed after completion of the project, to manage the facility.
- Municipal services, such as water, electricity and refuse services must be purchased from the local authority and municipal taxes must be paid.

The economic advantages of tourism development is as follows (Saayman, 2000:129):

- Tourism influences every component of the GDP of a country.
- Tourism creates government revenue via taxation.
- Tourism creates job opportunities.
- Tourism improves the balance of payments of a country through increased exports and foreign investment in tourism products.
- Tourism development often takes place in rural areas and therefore have the ability to influence income distribution positively.
- Tourism may cause sustainable economic development if implemented correctly.

The development of tourism can also have a number of disadvantages if it is not planned properly. These disadvantages are discussed by Saayman (2000) and should be taken into consideration by provincial authorities for they can influence the sustainability of tourism.

- Tourism leads to increased prices (inflation) because of the additional demand.
- Tourism demand is seasonal.
- Tourism has some opportunity cost, for example the promotion of tourism at the expense of another industry,
- Tax income earned from tourism is normally not sufficient to improve infrastructure for tourism, which leads to an increased tax burden on the local community.
- When tourism development takes place only in a few areas, it may lead to geographic economic distortions.

2.2.2 SOCIAL IMPACT

Mathieson and Wall (1982:137) describes the social impacts as "... the changes in the quality of life of residents of tourist destinations".

The following factors have a social impact on the host community:

- When tourism is developed in a community, it starts off as having the power to change a sometimes declining community into a prosperous community. This is the so-called "euphoria stage". After a while this stage goes through changes when the real impact of tourism is felt. The last stage is the "xenophobia stage" (negative attitudes towards tourists).
- Tourism can have a negative impact on the host community because of the moral conduct of tourists regarding:
 - ◇ **Gambling:** The gambling industry is expanding in South Africa. In every province gambling establishments are developed. With that the negative spin-offs are also developing in those communities. These negative spin-offs include prostitution and alcohol abuse. Criminal elements enter the community and gambling dependency occurs in the local community.

- ◇ **Health:** Tourists come from all over the world and also bring with them different types of viruses and germs. An example is the different types of flu and HIV / AIDS, which get worse as international tourists visit a specific community more frequently (Lickorish & Jenkins, 1997:78; Saayman, 1996(b):35-36; Inskeep, 1991:368; SATOUR, 1991:4).
- ◇ **Languages:** The multitude of languages which tourists use can effect the local language.
- ◇ **Prostitution:** Countries in the East specifically cater for sex tourism. In other areas where tourism is developed in poor communities, prostitution is an alternative way of income to an otherwise starving family.
- ◇ **Religion:** Tourists have there own religions and they expose the community to these alternative religions, which are not always acceptable, to the community.
- ◇ **Safety and security:** In South Africa, where the crime level is high, tourists are seen as easy targets. Acts of crime and violence against tourists can have a negative effect on the tourism industry.

The above impacts have to be dealt with in tourism planning to ensure sustainability for tourism in a province. To make sure that all the relevant social issues are incorporated and dealt with in the planning of a specific tourism development, the local community should be involved in the planning of the project. That will ensure that the community is informed and that possible future problems and / or fears are managed in the planning phase of the project.

Saayman (2000:151) suggests the following five solutions to minimise the above social impacts:

- **Education:** Tourism is better received when the community has been more adequately informed about the industry.
- **Incorporating community perspectives:** The inclusion of community representatives in the development stage of a tourism development within a community may minimise possible future misconceptions pertaining to the development as well as the community's role in the development.

- **Principle of increased resident opportunity:** Give the local community the opportunity to use tourism (new development) to their own and the community's benefit.
- **Community equity and management committees:** Try to maximise local capital, entrepreneurial ability and labour in tourism developments. Incorporate the local community in management committees.
- **Research and monitoring:** Research on key social impact indicators (warning signs) would serve a useful function in respecting community interests and providing data on likely flash points of public dissatisfaction.

2.2.3 ENVIRONMENTAL IMPACT

The environmental impact of tourism affects both the internal and external environments.

Lickorish and Jenkins (1997:87) divide the impact that tourism has on the environment into negative and positive impacts.

- **Negative impacts** are:

Water pollution, air pollution, noise pollution, visual pollution, ecological disruption, environmental hazards, improper waste disposal, overcrowding and congestion. These are all products of planning processes that did not include an Environmental Impact Assessment, as stipulated in the Environmental Conservation Act 73 of 1989 to estimate the impact of a development on the environment. This act (Act 73 of 1989, part 1, 2(c)) further stipulates that “the protection of the environment against disturbance, deterioration, defacement, poisoning, pollution or destruction as a result of man-made structures, installations, processes or products or human activities” are the responsibility of “each Minister, competent authority, local authority and government institution upon which any power has been conferred or to which any duty which may have an influence on the environment has been assigned by or under any law shall exercise such power and perform such duty in accordance with the policy referred to in section 2” (Environmental Conservation Act 73 of 1989, part 1, 3(1)).

Land use problems stems from the fact that every local authority has its own land use policy. The reason for this is that every local authority has its own unique environmental circumstances. These land use policies can be dealt with on a local authority level and exceptions can be made to assist the development of a properly planned tourism development (Kidd, 1997).

Damage to historic and archaeological sites is another negative environmental impact of tourism (Inskeep, 1991:342).

- **Positive impacts** of tourism development which should be considered with all the other relevant elements are:
 - ◇ Conservation of important natural areas.
 - ◇ Conservation of archaeological and historic sites.
 - ◇ Improvement of environmental quality.
 - ◇ Enhancement of the environment.
 - ◇ Improvement of infrastructure.

When a new tourism development that may have a substantial detrimental effect on the environment is planned, an Environmental Impact Assessment should be done by the applicant to ascertain the extent of the impact.

The environmental impacts are not evaluated only according to tourists' impact on the environment, but also *visa versa*. The seasonality of an area for instance, is a factor that can influence potential tourists' choice, duration and return visits in the future.

The biomes, as discussed in chapter 3, should be kept in mind when tourism strategic planning is done. They can have a negative or positive influence on the tourist decision, outlay of a destination, types of recreation activities presented and facilities developed.

According to Saayman (2000) a key aspect of tourism development is that it must be sustainable. For tourism development to be sustainable, conservation of the natural environment is essential. Tourism is one of the only industries where conservation may actually contribute towards economic development.

The various natural and cultural products the provinces utilise to identify and market their province, are proof of the diversity of South Africa's tourism market. It also opens opportunities for tourism growth that can lead to job creation and influx of foreign exchange earnings (South Africa, 1999; White Paper on Tourism, 1996:5).

Tourism products vary because of the different biomes. In the Western Cape, for example, the weather is suitable for the growing of grapes and the making of wine, regarded as some of the best in the world. Fynbos is also synonymous with this province. Parts of Mpumalanga and the Northern Province is known for the Big Five (animals), internationally acclaimed resorts and nature reserves such as the Kruger National Park and Mala-Mala Nature Reserve. Kwa-Zulu Natal is famous for its all-year warm climate and scenic coast line.

For the purpose of this study the **external environment** is not discussed extensively, because it is not central to this study. However, the important influence that the external environment has on the key strategic elements is illustrated in Figure 2.1. The external environment is divided into the following sectors:

- **Demographics**

According to Pearce and Robinson (1994:103) it is important for provinces to know the following demographic information about tourists using facilities or pass through their boundaries:

- ◇ Culture.
- ◇ Place of origin.
- ◇ Age.
- ◇ Gender.
- ◇ Level of education.
- ◇ Occupation.
- ◇ Social factors, e.g. values, attitudes and opinions as developed from their cultural, ecological, demographic, beliefs, educational and ethnical circumstances.

- **Politics / Legislation**

Cloete (1995:27) is of the opinion that political and legislative factors influence the format that provinces use to formulate and implement strategic tourism planning.

McGlashan and Singleton (1987:51) identify the following as having an influence on the external environment:

- ◇ Control of environmental pollution.
- ◇ Labour laws.
- ◇ Salary and price control.
- ◇ Equal in-service training.
- ◇ Tax laws.
- ◇ Municipal by-laws.
- ◇ Ordinances.

- **Economy**

An analysis of the international and national economy is important for a province to determine if tourism development could be successful. A province will only give attention to those economic factors that could have an influence on its long-term strategy (Du Preez, 1989:25).

McGlashan and Singleton (1987:563) find that provinces should monitor economic circumstances relating to tourism.

- **Market analysis**

According to Kroon (1994:90-91) the qualitative analysis of the market segments is important, as well as the forecasting of the quantitative traits. The quantitative traits include the forecasting of market needs and the market potential. With the above information management can accomplish the following:

- ◇ Acknowledgement of opportunities and threats in the market segment.
- ◇ Utilising these opportunities in the market within the framework of the strong and weak points in an organisation / province.

- ◇ Choosing the most relevant target market or markets.
- ◇ Formulating a marketing strategy for the organisation / province.
- ◇ Making decisions within a formulated marketing strategy that is incorporated in an organisational strategy (corporate strategy).

- **Ecology**

Ecology includes climate, seasonality, fauna & flora and nature conservation. The location of a province has a major effect on the province's strategy, especially as far as marketing of a specific province is concerned. Legislation concerning environmental impact analysis can affect a planned tourism development positively or negatively in the sense of economical viability.

- **Technology**

Developments in the technology field can have an effect on the tourism market for example internet and e-mail which made booking of a hotel room or renting a car in another country possible by use of a telephone line. It is very cost effective and competitive for the tourism industry. According to Digman (1990:50) the following are included in this sector:

- ◇ Relevant cost factors.
- ◇ Quality of product.
- ◇ Tempo of technological change.
- ◇ Innovations.

- **Competitors**

This sector includes similar organisations that provide or sell the same or similar services / products (Hanan, 1993:23). Saayman (1989) mentions that existing competition has to be taken into consideration when compiling a strategic tourism plan. If not, an existing competitor could be offering a similar service at a lower tariff. In Figure 2.1 and the following discussion (key strategic elements) existing competition is discussed more extensively.

The organisation can do nothing to control the environmental factors. The only way to handle changes in the external environment is by having a proper strategic plan in place (Frechtling, 1996:121). Change should be predicted before it happens. Digman (1990:5) claims that "changes in any one of these areas can have significant impacts on the firm [province], its products, its markets, its ability to compete, and its methods of doing business".

The only external environmental element that is discussed extensively, is existing competition. This element is included in this study especially to address the problem of the unequal development of tourism in the different provinces. This disparity can be minimised if a strategic planning model, as developed in this study, is implemented in the provinces. Existing competition is also an important element because globalisation has a major effect on provincial tourism relating to competition in the tourism industry.

The WTO News (1998) points out that Africa has the opportunity to transform itself into a net winner in the global tourism competition, but it must first face the challenges posed by health and safety concerns of potential tourists. The fact that the rest of the world do not always see South Africa as a country on its own but rather as part of Africa, should be bore in mind when planning or marketing for the provinces.

According to Saayman (2000:73) globalisation is "... a process of shrinking the world, increasing competition and stimulating innovations, all of which relate to a paradigm shift". This paradigm shift includes a new way of approaching marketing, policy development, product development and training - in other words, a new tourism.

The nine provinces can benefit through the globalisation of tourism by using the opportunity to market South Africa as a new fresh destination for the international tourist to enjoy at international tourism shows. Further more, the growing demand of the black community in South Africa to travel may be used to the benefit of all provinces.

2.3 KEY STRATEGIC ELEMENTS OF STRATEGIC TOURISM PLANNING

Researches such as Mathieson and Wall (1982), Inskeep (1991), Harrison (1992), Rogers and Slinn (1993), Smith (1995), Lickorish and Jenkins (1997), Saayman (1996(b)) and Myburgh and Saayman (1999) identify a number of key strategic elements (Figure 2.1) of tourism.

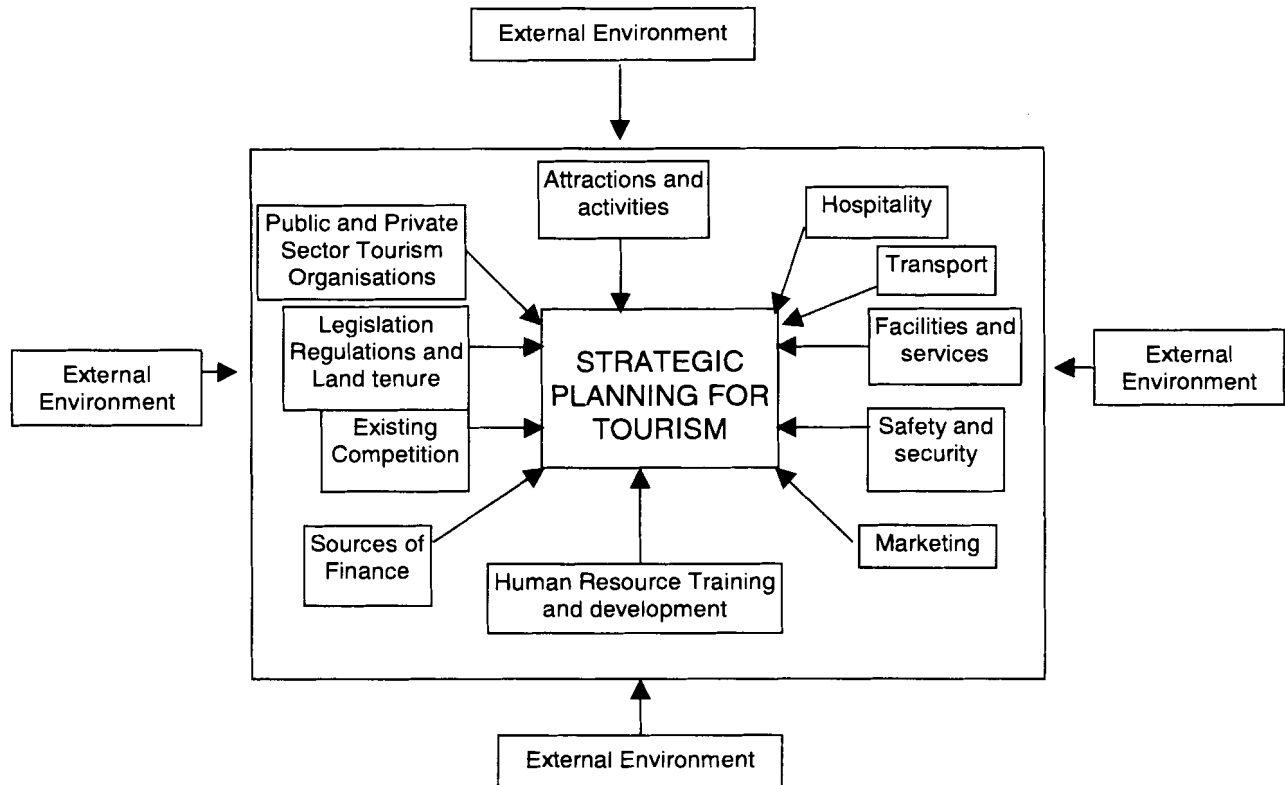


FIGURE 2.1: Key strategic elements of strategic planning for tourism

The analysis of the tourism market is of the utmost importance for strategic planning, because the elements of tourism need to be identified and the present situation within each of them established. There-after the tourists' attributes and specific needs have to be identified and developed. It sometimes happens that a specific tourism product has not been introduced within a community or country and that development and an awareness campaign regarding that particular product is necessary in that community.

The key elements that have an influence on tourism strategic planning, as identified in Figure 2.1, are discussed below.

2.3.1 ATTRACTIONS AND ACTIVITIES

This element is one of the primary motivations for tourists to travel (Saayman, 2000). An attraction or activity that interests a potential tourist can influence his / her decision to go on a trip or not, and where to go.

Rogers and Slinn (1993:5) divided attractions and activities into business (exhibitions, conferences and incentive tourism) and recreation (activities at the destination).

Smith (1995:29) divides activities into the categories of participant sports, spectator sports, cultural activities, meetings and conventions, religious activities, sightseeing, health-related activities, shopping and other (restaurants, night clubs, bars and casinos).

In planning it is imperative to know if the tourist is visiting an attraction for business or pleasure. This distinction is necessary to plan for the correct service to be rendered and to identify the needs of tourists regarding attractions, for planning and development purposes.

The following criteria are important in this regard.

- Climate of the province.
- Purpose of the tourist's visit (business or recreation) in the province.
- Types of attractions available in a province.
- Type and quality of secondary service organisations (service stations, laundromats, food stores) available to tourists in the province.
- Analysis of a province's tourism products.
- What does a Province's biomes consist of?
- Is the province a seasonal or all-year round attraction?

2.3.2 HOSPITALITY (ACCOMMODATION AND CATERING)

This element consist of serviced accommodation (hotels, motels, guesthouses and bed-and-breakfast facilities), self-service accommodation (resorts, game farms, holiday flats and holiday houses), visiting friends and relatives, food and catering

(restaurants, fast food facilities and coffee shops) and community (Cullen, 1997:73-75). Saayman (2000) identifies this element as a second primary reason for a tourists to make a decision about his / her holiday or trip.

In tourism planning the development of accommodation and catering facilities is important, because when a tourist decided on his / her destination, accommodation and food has to be provided at the destination (Starr, 1997:211-232).

Criteria that are important in this regard are:

- The tourists' duration of stay at a tourist destination in the province.
- The total number of beds available in a province pertaining to hotels, guesthouses, bed-and-breakfast facilities, motels and other overnight facilities.
- The quality of service (grading) tourists can expect in the province from all tourism-related products.
- The types of catering facilities available for tourists in the province (restaurants, tea gardens, coffee shops, franchise establishments).

2.3.3 TRANSPORT

This is the third primary factor that influences a tourists decision about taking a trip or going on holiday (Saayman, 2000:194). Bull (1991:152) mentions that the choice of transport for the tourist will usually be made on the basis of availability, frequency, cost / price, speed / time and comfort / luxury of transport. Other factors that can also have an influence are safety, convenience, ground services, terminal facilities and locations, status, prestige, and departure and arrival times. Saayman (2000:195-196) finds that, inertia (reluctance to move), type of movement (type of transport), type of activity (reason for travel) and type of journey will determine the type of transport that will be used by tourists.

Transport has to be part of the planning process for tourism, because the tourist will have to travel to and from his / her tourist destination using some form of transport. The choice that the tourist makes regarding travel mode is not only linked to the above factors but also to the reason for the trip, whether it is business or pleasure. His / her choice of transport mode also has an influence on accessibility to and from

the destination, including road networks, train stations, airports / landing strips and harbours / ports.

The modes of transport are divided into the following four modes (Saayman, 2000:187-190; Bull, 1991:152-170; Inskeep, 1991:120-121):

Motor vehicle and bus transport (service busses, coaches, coach hire, car hire and cycles),

Train transport (high-speed trains, inter-city and local services),

Air transport (scheduled, charter, private hire) and

Water transport (passenger shipping and ferries).

The following criteria are important here:

- Quality of access routes (all modes of transport) to and from a province.
- Mode of transport used by the tourist.
- Cost of transport mode.
- Availability of transport mode.
- Frequency of transport mode.
- Travelling time / speed of transport mode.
- Comfort / luxury of transport mode.
- Uniform road signs.

2.3.4 FACILITIES AND SERVICES

Inskeep (1991:111-124) points out that facilities have to be purpose-built, comply with building standards and service standards fulfil the tourists' needs. In the planning phase the facilities element needs to be prioritised because this is one of the elements that has a significant economical impact for the developer. It also has an impact on the environment where it is proposed to be erected (Myburgh & Saayman, 1999:55).

The facilities element can have a significant economic benefit for the community, region and province. In the short term these include buying building material locally

and offering labour opportunities. Long-term benefits are buying of groceries, paying property taxes, municipal services and bed levies.

Inskeep (1991:116-119) and Saayman (2000:257) subdivide facilities and services as follows:

- **Basic evaluation:** It includes location of the proposed facility, economic prospects (short and long term), safety, globalisation, legal and social restrictions, taxes and all other financial aspects, role of the private sector and other tourism attractions and products.
- **Accommodation:** Examples are hotels, motels, resorts, guesthouses, bed-and-breakfast facilities, game farms, caravan parks and floating accommodation.
- **Tour and travel operations:** This trade comprises of two interdependent sectors, namely tour operators and travel agents. It includes the following integrated subsections, namely hotel and theatre booking agencies and representatives, incoming handling agents, tourist guides and tour managers, airline seat brokers, and incentive travel houses. In the tourism planning process these services must be incorporated, for they are the sectors in the tourism industry that brings all the tourism elements together. They compile the tour packages and market them to the potential tourists. However, one should note that not all tourists work through a tour operator or tour agencies when planning a trip or holiday.
- **Hospitality establishments:** These consist of restaurants, bars and other eating and drinking establishments. The following should be considered: type and variety of cuisine and service; quality level of food, drink and service; natural resources; pricing levels of food and drink; levels of hygiene maintained; physical attractiveness and comfort level of the establishment; and locations of the establishments relative to tourist accommodation locations and travel itineraries.
- **Tourist information:** National / provincial tourist boards also have an important part to play here. Their responsibilities are to implement advertising campaigns; design, publish and distribute promotional literature; and to make available information literature and systems. They organise training courses for

information staff and register tourist guides to ensure a high standard (Tourism in GEAR, 1997:8-9)(GEAR - Growth, Employment and Redistribution). Hotels, tour and travel agencies, tourist information facilities and services also give information to tourists.

- **Shopping and personal services:** It includes shopping for personal items, arts and craft items and convenience items. The following have to be evaluated for planning purposes: types of facilities, goods and services available, their location, convenience of access and pricing levels.
- **Money exchange and other financial services:** Foreign exchange facilities for international tourists, acceptance of credit cards by local tourist industry and banking services, as well as their locality and accessibility for tourists.
- **Medical facilities and services:** Adequate medical facilities and services for tourists. Some tourists have endemic health problems. Accidents and general health problems can occur that necessitates a quick medical service. Locality and access for tourists are very important in the planning of tourism facilities.
- **Public safety:** In South Africa safety and security is a national problem. Police facilities and services as well as the security of tourist destinations and facilities need to be evaluated and re-evaluated on a regular basis to ensure the safety of tourists at all times.
- **Postal services:** It is important to plan for efficient and essential postal services at the facility. The location, accessibility, reliability of delivery time, protection against loss and the efficient and friendly service of postal clerks need to be part of the strategic planning.
- **Entry and exit facilitation:** International tourist enter South Africa through customs. The adequacy of physical facilities, convenience and logical sequence of procedures, and honesty, friendliness and efficiency of the personnel involved are imperative because this is international tourists' first encounter with South Africa.
- **Other facilities and services:** Depending on the type of tourist, the following are important: service stations, self-service laundromats, food stores for auto-travellers and campers.

Criteria that are important for strategic planning for this element are:

- The purpose of the tourists visit (business or recreation).
- The importance of secondary service organisations (gasoline service stations, laundromats, food stores, etc.) for the strategic planning of facilities and services.
- The importance for a province to analyse its tourism products and services.
- The importance provinces attach to the awareness of and provision for disabled people in their strategic plans.

2.3.5 SAFETY AND SECURITY

Tourism is seen by many people as a vehicle through which economic and socio-economic upliftment can be achieved in South Africa (White paper on Tourism, 1996). The present safety and security situation in South Africa is not only a deterrent for international tourists to visit the country but also contributes to the negative perception of potential tourists about certain regions in South Africa (South Africa, 1996).

Tourism is most sensitive to any perceived or actual threat to personal safety (SATOUR, 1991:7). The flow of information to and from tourists regarding safety and security issues are important to inform tourists of the local crime situation and for tourists to be assured of prompt and professional response in an emergency.

Crimes against tourists are not always intended to do bodily harm but their luggage, money (cash or travellers cheques), video recorders and cameras are often stolen. International tourists are not always aware of precautions that need to be taken in a country with a high crime rate. The result is that tourists do not take the necessary precautions and that they are easy targets for criminals. These precautions need to be explained to the tourists before they encounter them, because it can create a problem if not handled correctly (Baker, 1995:208). If this crime prevention information is not given at the correct time and handled sensitively, it could create an unsafe environment. The consequence is that the tourists would want to leave this area as quickly as possible, with definite economical disadvantages for that area or province.

The inclusion of safety and security in a strategic plan for tourism in a province, as explained above, is imperative for sustainable tourism.

Criteria that are important for strategic planning here are:

- How relevant and important does a province rate health-related issues such as HIV / Aids, malaria and cholera as a safety factor in their strategic plan?
- How important does a province rate their tourists' safety and security when drawing up a strategic plan?
- Other criteria that should be considered, are:
 - ◊ Location of the province.
 - ◊ Tourism awareness campaigns.
 - ◊ Informing tourists of crime prevention measures that the local police are implementing and possible danger areas or situations which should be avoided during their stay.

2.3.6 MARKETING

The tourism products and services available to tourists in a province can only be brought to the attention of domestic or international tourists by means of a marketing plan (Cloete, 1995:38). According to Godfrey and Clarke (2000:125) "... marketing is a strategic process that aims to fit the resources of a destination to the opportunities existing in the market", and "... it [marketing] is complementary to planning".

A marketing plan starts by investigating the current tourism industry (including accommodation, travel, facilities and services), and then identifies the specific tourism market. By identifying the market, the marketer determines the market segment he wishes to penetrate or develop. This is done by means of developing a marketing mix for the market. The marketing mix, according to Heath (1987), Marx (1989) and Godfrey and Clarke (2000), consists of product, place, price and promotion. Marketing is an implementation tool, which is used to implement a plan. This is done to increase the number of tourists visiting the relevant province. By rendering additional services and facilities, tourist spending can be increased, with a consequent positive economical impact on the province and its community.

According to Bull (1991:11) those tourism suppliers who take a strong marketing-orientated approach to their business, are concerned with understanding their customers and their needs.

At a certain time in the tourism strategic planning process the tourist must make a decision about where he / she wants to go, which type of transport mode he / she would like to use and where to overnight (type of accommodation). He / she must also decide what to do (recreational activities or business) and how to accommodate the children (Mill & Morrison, 1985:69). Tribe (1995:46) explains that the tourist's choice is based on the following: "... first, that the consumer have limited income, second that consumers act in a rational manner, and third that consumers aim to maximise their total satisfaction, subject to the constraints of limited income". Trigg (1995:26) is of the opinion that the following tourist categories have an influence on tourists' choice:

- Pleasure
- Business
- Groups
- Individuals.

According to Bennett (1995:72) (Figure 2.2) South Africa, including the provinces, is competing as a long-haul tourist destination and should therefore realise that having a good product is not enough in a more competitive market. The motives and expectations of tourists must be investigated in order to attract international and local tourists and to satisfy their expectations and needs.

In Figure 2.2 three main elements pertaining to a tourists travelling / holiday choice are identified, namely:

- Dynamic changing environment - influence individual needs, aspirations and desires.
- Motivation factor - stems from these needs and desires.
- Decision making process - starts with the collection of information and ends with the assessment of the experience (Bennett, 1995:73).

The following key tourism elements play a role in the tourist's holiday or business trip choice, as illustrated in Figure 2.2.

- The limited accommodation at the destination.
- Type of transport that will be required to make the trip.
- The safety and security situation at the chosen area.
- The facilities and services which are available for the rest of the family or group.
- Does the prospective tourist have enough money to pay for the trip / holiday?

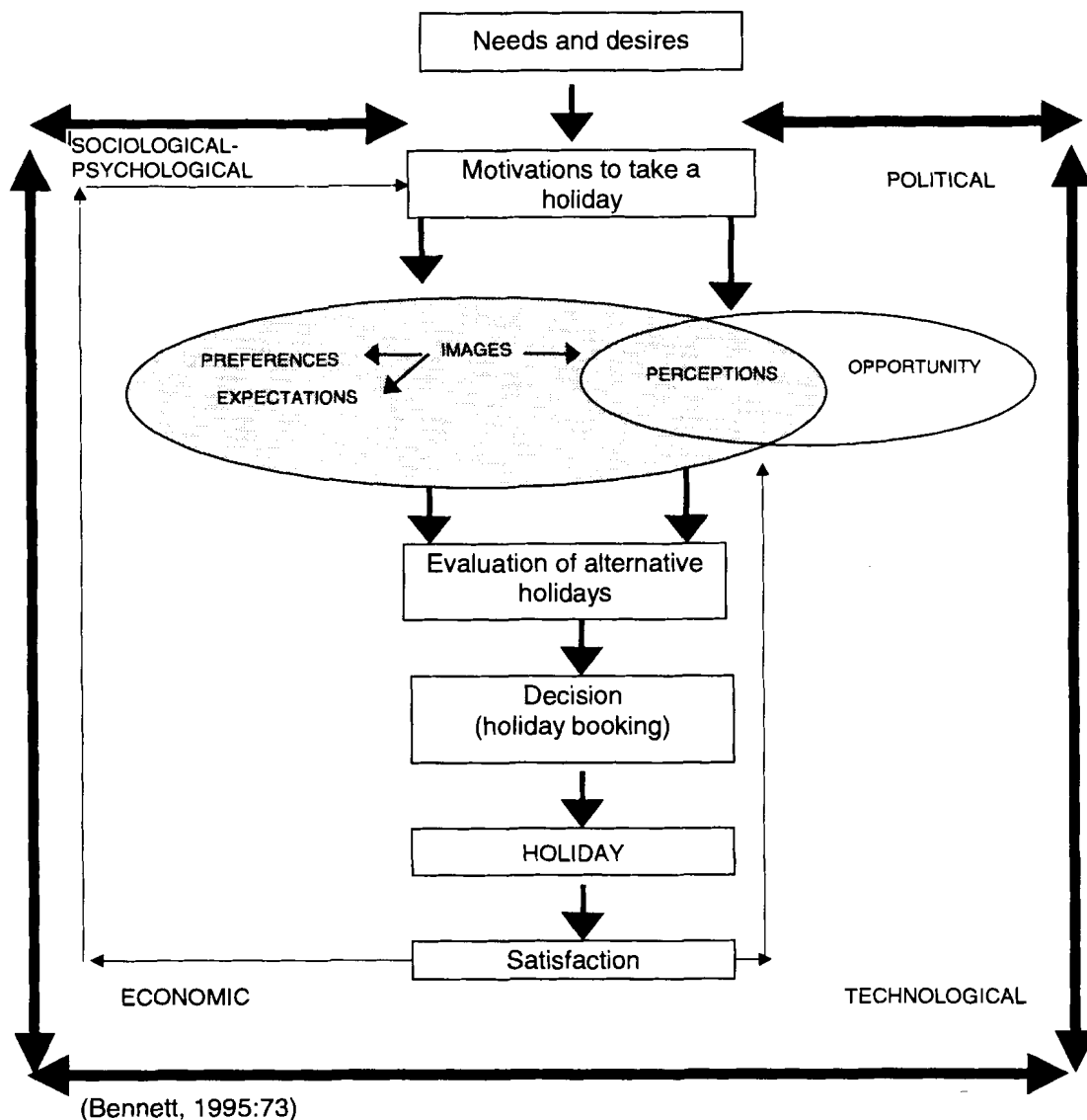


FIGURE 2.2: The tourist's holiday choice

The above shows the interaction between the key elements when a prospective tourist choose a holiday or business trip.

Kotler *et al.* (1996:200) shows that it is important to know who are involved in the buying decision and what role each person plays. The buying decision is illustrated in Figure 2.3.

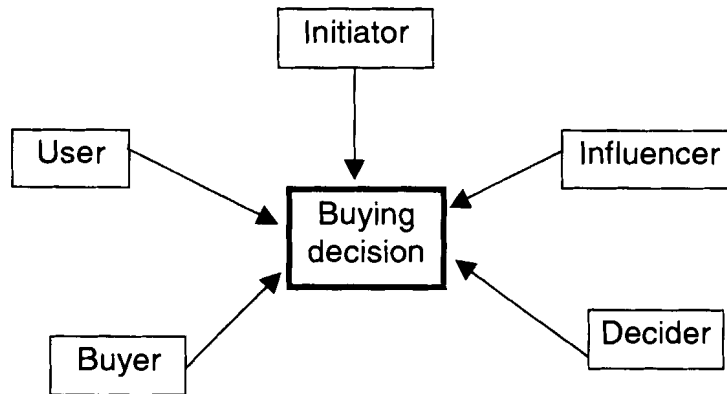


FIGURE 2.3: The buying roles of tourists (Kotler *et al.*, 1996:201)

When deciding where to go for the holiday, there is normally more than one person who influence the decision. The roles people play when buying a holiday are discussed according to Figure 2.3 (Kotler *et al.*, 1996:200-201):

- **Initiator:** person who first thinks or suggests a holiday or trip.
- **Influencer:** person whose advice and views are important when the final buying decision is made.
- **Decider:** person who makes the final buying decision or part of it.
- **Buyer:** person who makes the actual purchase.
- **User:** person who goes on holiday or a trip.

The discussion below, points out the factors and issues that are important for a tourist when deciding on his / her holiday or business trip.

Mathieson and Wall (1982:22) and Inskip (1991:107-108) find that the characteristics and attitudes of a tourist are important for planning purposes. The following are examples of information used to characterise tourists:

- Place of origin.
- Purpose of the visit.
- Length of stay.
- Age, sex, and number of family members travelling together.
- Type of employment and income levels.
- Where travelled and stayed during visit.
- Number of times visited.

- Individual or groups travel.
- Expenditure patterns.
- Visitor attitudes and satisfaction levels.

Inskeep (1991) uses the above information to draw up a tourist profile.

Mathieson and Wall (1982:29) divides the tourists' profile into two major categories. The first is the socio-economic characteristic of tourists and consists of age, education, income and previous experience. Attitudes, perceptions and motivation also affect decisions.

The second category consists of behavioural characteristics of tourists. A tourist's decision to go on a certain holiday or to travel a certain way is affected by motivation, attitudes, needs and values.

Lickorish and Jenkins (1997:57) go further and declare that "value for money" is an important factor that influences a tourist's decision to visit a specific destination. It is especially with the lower income groups that this factor is of significance because it leaves more purchasing power for the discretionary expenditure portion of the holiday budget.

An additional aspect to bear in mind in marketing is the information technology (IT) industry that has developed to such an extent that it cannot be left out of the marketing strategy. Internet, e-mail and computer development have changed the way reservations / bookings are made for tourism destinations and for modes of transport (Godfrey & Clarke, 2000:128). Provinces' tourism development plan will have to investigate and keep up with the latest developments in the information technology field to keep up with competitors (other provinces) in the tourism field. The marketing of tourism destinations have also changed with Internet and e-mail.

It is important for a tourism information service (including provinces) to assist their customers and tourism organisations with the latest available information on information technological advancements.

Criteria that are important for a strategic plan here are:

- Climate, location of province, province's biomes and seasonality.
- Promotional and pricing strategies.

- Purpose of the tourist's visit (business or recreation).
- Tourist's duration of stay at a tourist destination.
- Tourist's expenditure during his / her stay.
- Information Technology (IT) and mechanism for acquiring tourism statistics.

2.3.7 HUMAN RESOURCE TRAINING AND DEVELOPMENT

According to the White Paper on Tourism (1996:30) tourism education and training is one of the fundamental pillars of the development of a new responsible tourism industry in South Africa. This means that tourism in the provinces cannot be developed without proper training for the present and future staff, as well as for all sectors within tourism.

The World Tourism Organisation (1998:108) declares that training and development is needed as an element in strategic planning for tourism, firstly to ensure a high level of service to all tourists and to enable staff members to implement a plan as stipulated. Special tourism sensitivity training is often required for customs and immigration officials, taxi drivers and retail clerks.

Baker (1995:99) recommends that training courses for the different sectors within the tourism industry should be done at accredited higher education institutions such as colleges, technicons and universities. In the private sector there are also a few training and development institutions that provide tourism courses and in-service training.

Tourism awareness campaigns by national and provincial government are needed to educate communities in tourism and its impacts on their community's economy, society and environment.

The following criteria are important for this element to be included for a strategic plan:

- Tourism staff attitude.
- Training and development of staff members.
- Tourism awareness campaigns.

- Tourism training for new entrepreneurs in tourism industry (provinces' involvement in establishing new tourism businesses).

2.3.8 SOURCES OF FINANCE

The national and provincial departments of Finance, provincial tourism organisations / authorities and various banking institutions have a policy where provision is made for financial assistance to small, medium and macro enterprises (SMME's) if they intend to develop tourism in South Africa.

Sources of finance are imperative to ensure a successful tourism development. The information about sources of finance is important to ensure the availability of capital for the following (Bull, 1991:215):

- New fixed assets, such as buildings, equipment and fixtures.
- Refurbishment / replacement of fixed assets.
- Working capital, a fund from which to pay recurring production costs.

In South Africa previously disadvantaged entrepreneurs are motivated to start their own tourism businesses. These prospective developers have to rely on external sources of finance. The availability of sources of finance is to a large extent the biggest obstacle for a tourism development to continue. Most of this is to the detriment of the local community (World Tourism Organisation, 1998:27).

Myburg and Saayman (1999:211-212) identify the following key financing sources available:

- **Business partners:** The following four forms of assistance are rendered to small business:
 - ◇ Direct financial assistance.
 - ◇ Indirect financial assistance by underwriting up to 80% of a firm's bank loan.
 - ◇ Business premises and shopping complexes financed by the Business partners.
 - ◇ An advisory and training service to prepare and assist entrepreneurs to run their businesses.

- **The Development Bank of Southern Africa (DBSA):** Some of the main objectives of the Bank are to further economic development, increase production and raise standards of living in certain areas; to achieve a more equitable distribution of economic activity; to mobilise public and private capital for investment in development and to provide the technical support and training necessary for achieving these goals.
- **The Industrial Development Corporation (I.D.C.):** It co-operates with owners to provide capital for the general development and decentralisation of firms and also makes special provision to help firms increase their interests.

Criteria that are important for strategic tourism planning here are:

- Involvement of the local community.
- Utilising SMME's when conducting awareness campaigns in a province.
- Analysing local SMME's for possible tourism development or funding of emerging tourism entrepreneurs.
- Accessibility of finance for developers.
- Provinces involvement in establishing new tourism businesses.
- Financing of tourism development / projects.
- Provincial governments involvement in accessing national and international funding for tourism development.

2.3.9 EXISTING COMPETITION

Provinces have to ascertain who or what is their competition in the tourism market locally and internationally. The nine provinces will be competing for the same international tourists coming to South Africa, as well for as domestic tourists. The provinces differ in terms of biomes, weather, climate patterns and historical and geological sites. This diversity can be used to the benefit of a province. However, South Africa attracts international tourists and every province have to promote their tourist destinations to such an extent that it gets the biggest percentage of international tourists visiting South Africa (SATOUR, 1994:4).

Within the planning process the competition has to be evaluated and their strong and weak points identified. Marketing methods have to be identified, training offered and facility upgrading planned to ensure that the specific province gets a significant portion of the tourism market segment (Mill & Morrison, 1985:98).

Criteria that are important for strategic planning is here are:

- Analysing a province's existing competitors.
- Globalisation of tourism.
- Analysing key success factors.
- Analysing the external environment.

2.3.10 LEGISLATION, REGULATIONS AND LAND TENURE

Tourism legislation forms an integral part of tourism planning for the reason that all business and community life are to a large extent dictated by legislation. Tourism legislation determines where a developer can build a tourist facility. It also prohibits the destruction of the environment. Here the Environmental Conservation Act (Environmental Conservation Act 73 of 1989) plays a major role. Under Section 21 of the Act, activities are identified which may have a substantial detrimental effect on the environment. According to Section 22(1) of the same Act, no person shall undertake an activity as mentioned, and local authorities may only permit land use changes on the basis of an approved environmental impact assessment or written authorisation issued by a competent authority. Legislation further provides guidelines to a developer to ensure that the tourism development will be to the benefit of the developer, local community, province and the country (World Tourism Organisation, 1998:168).

Swart (1997) finds that the following Acts have a direct impact on how successful tourism can be implemented in the provinces.

- Currency and Exchange Act of 1933.
- Sea-Shore Act 21 of 1935.
- Advertising on Roads and Ribbon Development Act 21 of 1940.
- Customs and Excise Act 91 of 1964.

- Gambling Act 51 of 1965.
- National Monuments Act 28 of 1969.
- Mountain Catchment Areas Act 63 of 1970.
- National Roads Act 54 of 1971.
- Sea Birds and Seals Protection Act 46 of 1973.
- Lake Areas Development Act 139 of 1975.
- National Parks Act 57 of 1976.
- Health Act 63 of 1977.
- National Building Regulation and Building Standards Act 103 of 1977.
- Road Transportation Act 74 of 1977.
- Culture Promotion Act 35 of 1983.
- Forest Act 122 of 1984.
- National Libraries Act 56 of 1985.
- Housing Act 103 of 1985.
- Sectional Titles Act 95 of 1986.
- Sea Fishery Act 12 of 1988.
- Liquor Act 27 of 1989.
- Environmental Conservation Act 73 of 1989.
- Physical Planning Act 125 of 1991.
- Tourism Act 72 of 1993.
- Public Holidays Act 36 of 1994.
- Income Tax Act 21 of 1995.
- Tourism Amendment Act 105 of 1996.
- Gambling Act 33 of 1996.
- Liquor: Policy Document and Bill (Notice 1025 of 1997).
- Constitution of the Republic of South Africa 108 of 1996 as adopted by the Constitutional Assembly on 8 May 1996 as amended on 11 October 1996.
- White Paper on the development and promotion of tourism in South Africa, 1996.

- Provincial policies.

When development in tourism takes place in a specific area of a province, the area will automatically fall within the jurisdictional area of a local authority or Regional Council, in which a Town Planning Scheme will be applicable. These Town Planning Schemes regulate the different land tenures (uses) permissible on each piece of land. In addition to Town Planning Schemes, land tenure (use) rights are also controlled by each property's own Title Deed / Deed of Transfer. Tourism development therefore needs to be in accordance with the correct land tenure (use) rights (Inskeep, 1991:60).

All the relevant information regarding a site, such as zoning, permissible land uses, restrictive building measures, geological information, future extensions and development, ecological information, infrastructure, social and community facilities, present and future pollution levels and health / security aspects, may be obtained from the Town Planning Section at each local authority. In view of the fact that Town Planning applications and procedures are strictly depicted in Town Planning Legislation, a proposed development may be prohibited until the proper procedure has been followed, and the correct land tenure (use) rights have been obtained (Evans, 2000).

Criteria that are important for strategic planning here are:

- Policy papers (i.e. White paper on Tourism), transformation of the tourism industry and women in tourism.
- Local municipalities building regulations, Environmental Impact Analysis (EIA), legislation, regulations and land tenure (use).
- Compatibility of existing legislation, regulations and land tenure (use).
- The effect of local legislation and regulations on international tourists visiting your province (i.e. customs, import and export of items and taxes).

2.3.11 PUBLIC AND PRIVATE SECTOR TOURISM ORGANISATIONS

It is important for tourism planning to identify the public and private sectors departments and organisations managing and developing tourism, because in South Africa the national, provincial and regional tourism departments (public sector) have

the competency to develop tourism. They also have the finances to train tourism personnel, assist with in-service training and help new tourism organisations with financial assistance. The private sector can make use of the expertise within the public sector to the benefit of South Africa, tourism development and the community. In the introduction of this chapter the differences between the public and private sectors have been discussed in paragraph 2.1.

South African institutes in the public sector with tourism competency are:

- National Department of Environmental Affairs and Tourism.
- SATOUR (South African Tourism).
- South African National Parks Board.
- Provincial Departments, for example Finance & Economic Affairs or Environmental Affairs & Tourism.
- Provincial Tourism Authorities, for example Gauteng Tourism Authority.
- Services Councils, for example Western Gauteng Services Council.
- Regional Tourism Organisations, for example WESTOUR.
- Local Authorities.

The private sector in tourism consists of:

- Private proprietors that owns hotels, motels, guesthouses, game farms, restaurants and resorts.
- Private companies who own hotel groups, resort groups and casino resorts.

To compile a strategic planning model for Tourism Development at a provincial level, it is a prerequisite to investigate the existing national and provincial tourism structures. The reason for this is that the lack or availability of national and provincial tourism structures will have an effect on the implementation of a provincial strategic planning model. A lack of provincial tourism structures will have to be addressed in the strategic planning model. For the tourism strategic planning model to be effective, it has to be implemented by a designated tourism structure (Table 2.1) within a specific province. Furthermore, it is important that the management of the designated structure takes cognisance of the fact that this is a long-term project.

Criteria that are important for a strategic plan here are:

- Tourism structures at local, regional and provincial level.
- The involvement of the local community.
- The involvement of the local, regional and provincial tourism organisations / boards.
- Creating more SMME's (small, medium and macro enterprises).
- Utilising SMME's when conducting awareness campaigns in a province.
- The importance of the following government and semi-government departments (public sector) to be incorporated in a provinces strategic plan in conjunction with this element:
 - ◇ National Department of Environmental Affairs and Tourism.
 - ◇ SATOUR.
 - ◇ National Parks Board.
 - ◇ Provincial Tourism Departments.
 - ◇ Provincial Tourism Authorities / Boards.
 - ◇ Local Authorities.
- Non-Governmental Organisations (NGO's, tourism-related).
- Tourism-related private proprietors and private companies (private sector).

2.4 EXISTING TOURISM STRUCTURES

The investigation into the existing tourism structures in South Africa will start at the level of national government and then explore the provincial tourism structures. The links (communication, information and management) between the national and provincial structures will also be investigated.

The previous government of South Africa (before 1994) established a national tourism structure, namely South African Tourism (SATOUR). SATOUR's responsibilities were to promote South Africa as a tourist destination internationally and locally. In the past tourism's potential as an economic force was not fully

realised. In conjunction with SATOUR (Tourism Act 72 of 1998) the White Paper on Tourism (1996) states that one of the National Department of Environmental Affairs and Tourism's functions are tourism development and that provincial tourism organisations have to report to the Minister of that department. The present government of South Africa is aware of the potential tourism has. Government has, through the constitution, delegated the responsibility for tourism to the nine provinces (Norton, 1998:18).

The national government went further and compiled the White Paper on Tourism for South Africa (1996). According to the White Paper government gives the provinces national guidelines to draw up their own strategic plans for their respective unique tourist destinations. It has been a very positive step for government to delegate powers and functions with guidelines to the nine provinces. Now the provincial departments of the nine provinces have to manage the tourism development in their respective provinces. As mentioned earlier, the nine provinces each has their own unique circumstances and tourism structures (developed or underdeveloped). One of the primary constraints for provinces is the dissemination of information to the relevant tourism departments and organisations within the provinces. Most of the nine provinces do not have properly constituted and managed tourism departments. This weakens the link from which tourism organisations receive relevant information. The problem is aggravated by the fact that each province has its own tourism structure (as mentioned above).

The national and provincial structures are discussed here because at present the tourism-related NGO's and private sector are developed at a provincial level in a specific tourism field. However, there are NGO and private sector structures that are in existence and that are being consulted by government on tourism issues. Some of the NGO's and private organisations are Fedhasa (The Federated Hotel Association of South Africa), ASATA (Association of Travel Agents), Guesthouse associations and SATSA (South African Tourism Services Association).

For this reason there is a need for a strategic tourism planning model that can be changed to satisfy the specific needs of every province. A provincial tourism structure that will ensure better and constant flow of tourism information to and from provinces, NGO's, private sector and communities should be created before a strategic planning model can be implemented successfully.

In the White Paper on Tourism (1996) the government has identified and allocated certain functions and responsibilities to the three tiers of government, namely national (2.4.1), provincial (2.4.2) and local government (2.4.3). These functions are discussed below.

2.4.1 NATIONAL GOVERNMENT

2.4.1.1 Facilitation

- Provide a safe and stable political and economical environment for all tourists.
- Ensure the safety and security of residents and visitors.
- Encourage and provide incentives for private sector investment in tourism.
- Ensure enabling and appropriate legal and fiscal frameworks for the industry.
- Facilitate the development of a tourism culture in South Africa and the supply of skilled manpower for the industry.
- Ensure an active labour market policy and an appropriate labour relations environment for the industry.
- Allocate financial resources.
- Promote tourism as a national priority.
- Keep an accessible and regularly updated tourism data bank of statistics and research.
- Facilitate the effective marketing and promotion of the country.
- Encourage foreign investment.

2.4.1.2 Co-ordination

- Co-ordinate and liase with the provincial governments with regard to all aspects of tourism development, including inter- and intra-regional tourism development.
- Co-ordinate and liase with other Ministries, Agencies, NGO's, Training Institutions, Universities and other bodies related to the development of the tourism sector.

2.4.1.3 Planning and Policy-making

- Formulate, in collaboration with all other stakeholders, a national tourism policy and strategy.
- Develop integrated national tourism plans in collaboration with all other stakeholders.

2.4.1.4 Regulation and monitoring

- Ensure the application of integrated environmental management principles in land-use development proposals to facilitate sustainable utilisation of natural and cultural resources.
- Ensure the sustainable and responsible development of the tourism industry.
- Establish standards for facilities and services and maintain those standards.

2.4.1.5 Development Promotion

- Promote the development of destinations with high, medium and marginal tourism potential.
- Promote the involvement of communities at all levels of tourism activity.
- Promote the spread of responsible tourism.
- Promote the development of major tourism projects that will have national and country-wide impacts (for example trans-border peace parks).

2.4.2 PROVINCIAL GOVERNMENT

The roles of national government, as set out above, are also the responsibility of the provincial government.

To draw up a provincial strategic planning model it will be imperative to determine what responsibilities in respect of tourism legislation are national or provincial responsibilities. The following are responsibilities towards tourism development according to existing legislation, such as the White Paper on Tourism, 1996; Tourism Act 72 of 1998; Tourism in GEAR, 1998 and the Constitution of South Africa (1996):

- To develop and implement provincial policies, strategies, and objectives in line with national policies and strategies in conjunction with relevant stakeholders in a province appropriately modified to reflect provincial conditions.
- To liaise with the South African Police Service, Community Policing Forums, local authorities and other relevant bodies to ensure the safety and security of all tourists in a province.
- To do research and keep data networks up to date and available to the tourism industry (Information Technology).
- To liaise with national and other provincial governments on possible funding, financing and local, national and international investments for the province.
- To liaise with agencies, NGO's (Non-Governmental Organisations), training institutions, universities and other bodies related to training and development of the tourism sector and qualification standards.
- To ensure quality service and proper facility management through the appropriate training and development of management and staff in the tourism industry.
- To ensure the participation of local communities by encouraging local authorities to establish and maintain Community Tourism Forums.
- To put in place policy and regulations that manage the environment and cultural aspects.
- To liaise and co-ordinate tourism-related aspects between provinces, regions and local communities (including NGO's and Community Tourism Forums).
- To formulate an agreed-upon framework of roles, functions and responsibilities for tourism development within the province.
- To develop and implement a provincial marketing strategy that is in line with the national marketing strategy.
- To develop, in conjunction with all stakeholders in the province, a provincial strategic plan that is in line with the national strategic plan (White Paper on Tourism, 1996).

In light of the above the available provinces' strategic plans, white papers or long term plans will be discussed. Furthermore, each one of the provinces' plans will be evaluated against the legislated responsibilities and the extent to which they adhere to it.

The Systems Act 32 (South Africa, 2000) and the Constitution of the Republic of South Africa that delegates tourism development to the local governments, were referred to in Chapter 1. Table 2.1 below summarises the existing provincial tourism structures in South Africa today.

TABLE 2.1: Existing provincial tourism structures in South Africa

PROVINCES	PROVINCIAL DEPARTMENTS	PROVINCIAL PARKS BOARDS	PARASTATALS	TYPE OF STRUCTURES FOR PARASTATALS
Eastern Cape	Finance, Economic affairs, Environment & Tourism	X	Eastern Cape Tourism Board	Statutory Board
Free State	Environmental affairs & Tourism	✓	Free State Tourism Marketing Board	S 21 Co.
Gauteng	Finance & Economic affairs	X	Gauteng Tourism Agency	Statutory Board
KwaZulu Natal	Economic affairs & Tourism	✓	KwaZulu Natal Tourism Authority	Statutory Board including S 21 Co. Marketing
Mpumalanga	Environmental affairs & Tourism	✓	Mpumalanga Tourism Authority	S 21 Co. for Marketing
Northern Cape	Economic affairs & Tourism	X	Northern Cape Tourism Authority	S 21 Co.
Northern Province	Environmental affairs & Tourism	✓	Northern Province Tourism Board	S 21 Co.
North West Province	Tourism & Environmental Conservation	✓	North West Parks & Tourism Board	Statutory Board
Western Cape	None	X	Western Cape Tourism Board	Statutory Board

(Norton, 1998:23)

Key: ✓ Do have a Parks Board
 X Do not have a Parks Board

The way that provinces structure tourism differs from one province to the next (Table 2.1). Tourism is also housed in different departments by the various provinces, for example Finance, Economic Affairs, Environment & Tourism, Environmental Affairs & Tourism, Finance & Economic Affairs and Tourism & Environmental Conservation. This can also include parastatals, tourism boards, authority and agency, and the structure of parastatals, statutory board or Section 21 company (S21 Co.) (Table 2.1).

The ideal will be to have tourism in all nine provinces placed in similar provincial departments, so as to make the flow of information, planning, budgeting and similar implementation methods easier.

2.4.3 LOCAL GOVERNMENT

Specific functions of the local government include:

- Responsible land-use planning and urban development.
- Develop control powers over land use and land allocation.
- Provide and maintain tourist services, sites and attractions, for example camping and caravan sites, recreational facilities for residents (parks, historical buildings, sport facilities, theatres, museums).
- Road signs.
- Market and promote specific attractions and disseminate information.
- Control public health and safety.
- Organise local communities to participate in the tourism industry.
- Own and maintain certain sites for example ports and airports.
- Provide parking for coaches.
- Facilitate the establishment of taxi services.
- License establishments in accordance with the national framework.
- Promote the establishment of local publicity / tourism organisations.

The exact role of the local authority in each province will be determined by local conditions, skills available and financial resources. The above will be incorporated by the development of the IDP's (Integrated Development Programme) in the different local authorities.

According to the White Paper on Tourism (1996:50) local and provincial governments are expected to assist national government in developing a standard and to implement responsible tourism. To attract funding, donor agencies for tourism projects must be planned, community groups must be assisted to prepare themselves for tourism and tourism projects must be implemented. Assistance must be given in the conduct of tourism and environmental awareness programmes among communities and tourism industry. NGO's should assist in the implementation of specific tourism projects and should act as liaison between private sector and community. NGO's should further assist in monitoring and evaluating the development of responsible tourism in South Africa and contribute to the development of policies and plans for the tourism industry.

2.5 CONCLUSION

The objectives identified for this chapter were handled as follows:

- The following conclusions can be made. By investigating relevant sources in the tourism field, the following eleven key strategic elements have been identified as important to be included in a provincial strategic tourism model:
 - ◇ Attractions and activities
 - ◇ Hospitality
 - ◇ Transport
 - ◇ Facilities and services
 - ◇ Safety and security
 - ◇ Marketing
 - ◇ Human resource training and development
 - ◇ Sources of finance
 - ◇ Existing competition
 - ◇ Legislation, regulation and land tenure
 - ◇ Public and private sector organisations

- A literature study of relevant sources have been done to show the need and importance of each identified key element for strategic tourism planning.
- The importance and influence which a tourist's decision has on strategic tourism planning has been described (Figure 2.2).

Chapter 3 will evaluate and discuss the existing national and provincial strategic plans according to national guidelines (ten key success factors) and the identified eleven key strategic elements (2.3.1 - 2.3.11).

CHAPTER 3

ANALYSIS OF EXISTING STRATEGIC TOURISM PLANS AND MODELS

3.1 INTRODUCTION

South Africa has nine provinces: Western Cape, Eastern Cape, Northern Cape, Kwazulu Natal, Freestate, North West, Gauteng, Northern Province and Mpumulanga. Each manages their own tourism industries. Because of the nine provinces' ecological situations they will have different tourism strategic plans. A tourism strategic planning model that could be implemented by all nine provinces would have to take cognisance of all relevant differences (ecological and existing provincial tourism strategic plans).

The nine provinces have been requested by letter to forward their present strategic plans / long-term plans / corporate plans or marketing plans. It was emphasised in the letter that all information would be treated as confidential and that anonymous comparisons would be made between the provincial plans. Five of the nine provinces responded to the request and sent their strategic plans. A follow-up was done telephonically one month after the fifth strategic plan was received. The other four provinces did not respond. To be able to ascertain the present tourism planning models, the information received will be discussed as Province A, B, C, D and E (Table 3.2).

The objectives of this chapter are:

- To discuss the provinces' unique tourism circumstances (attractions) pertaining to the ecology, including the provinces' "Big Five" tourism attractions.
- To extract relevant information from the existing national strategic tourism plan (South Africa, 1996(b)) pertaining to provinces' responsibilities toward tourism development on provincial level.
- To evaluate the five existing provincial strategic tourism plans received according to the ten success factors, as put forward by the White Paper on Tourism (1996).

- To evaluate the five existing provincial strategic tourism plans received according to the eleven key strategic elements, as discussed in chapter 2.
- To determine the similarities and differences between the five existing provincial strategic tourism plans.

3.2 TOURISM-RELATED DIFFERENCES BETWEEN PROVINCES

Not one province has exactly the same tourism products as the other, whether developed or undeveloped. Hence every province has an opportunity to develop tourism in its specific area and for a different tourism market. The success of the provinces' tourism development will depend on developing a custom-made strategic plan and even more so on the implementation of such a plan (Inskeep, 1998).

The different natural and cultural products which the provinces utilise to identify and market themselves are proof of the diversity of South Africa's tourism market. It also opens up opportunities for tourism growth that can lead to job creation and an influx of foreign exchange earnings (South Africa, 1996(b):5).

South Africa's natural diversity is best discussed when the existing biomes are identified. The diversity of the provinces' natural resources is also an indication of the uniqueness of the nine provinces, as well as of identified marketable tourism attractions. It could lead to different tourism strategic plans because the nine provinces can target different tourism market segments. The different biomes in South Africa are discussed below.

3.2.1 BIOMES IN SOUTH AFRICA

According to Miller and Armstrong (1982:478) a biome is a large terrestrial ecosystem characterised by distinctive types of plants and animals. It is maintained under the climatic conditions of the region, for example tundra and tropical rain forest. Myburgh and Saayman (1999:155-158) describe six major habitat types or *biomes* which are identified in South Africa, namely:

- **Savannah:** This biome is the largest in South Africa. It covers 34,24% of the country. It includes the "Big Five", giraffe, wart-hogs, kudu and onyx. Trees in this region include, camel-thorn, baobab, wild sage, mopani and waboom.

Farming activities include cattle farming and cultivation of sunflower, cotton and maize. Minerals found here are chrome, manganese, titanium, iron and platinum. This biome is found in the North West Province, Northern Province, Mpumalanga, the North- and South Coasts of Kwazulu Natal and in the coastal area of the Eastern Cape.

- **Nama-Karoo:** It covers an area of 24,41% of South Africa. This semi-desert biome is suitable for sheep farming, has rich mineral deposits and is home to the bat-eared fox, ostrich, red- or saddle-backed jackal and mongoose. This biome is situated in the Northern and Western Cape, as well as the Free State.
- **Grassland:** Plant growth and animal life are limited. Farming consists mainly of maize, wool products and dairy and cattle farming. Rich gold and coal deposits stimulated large industrial development. Silver, platinum and tin are also found. It is the natural home of eland, blesbuck and black wildebeest. This biome is found in Gauteng, North West Province, the Free State, Kwazulu Natal and the Eastern Cape.
- **Succulent Karoo:** Succulents with thick leaves, trees with white trunks, spring blossoms, rich mineral deposits such as alluvial diamonds at Alexander Bay, copper, uranium, zinc and mica are typical of this biome. This biome is mainly found in the Western Cape (West Coast).
- **Fynbos:** It is one of only six recognised plant kingdoms in the world. A large variety of plant species are characteristic of fynbos. This biome is found only in the Western Cape and partially in the Eastern Cape .
- **Forest:** The only significant forests in South Africa are the Knysna and Tsitsikamma forests. Other small forest areas are found at Magoebaskloof, the Soutpansberg and Blouberg mountain ranges.

The following table (Table 3.1), adapted from Norton (1998:24) and South Africa Yearbook 2000 / 01 (2000:324-344), shows the “Big Five” attractions of the nine provinces. It further proves the diversity and uniqueness of the various provinces in South Africa.

TABLE 3.1: "Big Five" attractions of South Africa's nine provinces

<p>EASTERN CAPE</p> <p>Beaches (all-year season)</p> <p>Transkei - Wild Coast Sun Resort</p> <p>Malaria-free wildlife</p> <p>Karoo - Mountain Zebra National Park</p> <p>Addo Elephant Park</p>	<p>FREE STATE</p> <p>Golden Gate Highlands National Parks</p> <p>Maluti Mountains</p> <p>Malaria-free wildlife</p> <p>Cultural diversity: e.g. Basotho Cultural Village</p> <p>Agriculture ("granary of the country")</p>
<p>GAUTENG</p> <p>Gold Reef City (mining history)</p> <p>Soweto / local tours</p> <p>Kromdraai Conservancy (incl. Sterkfontein: World Heritage site and Wonder caves)</p> <p>Johannesburg Zoo</p> <p>Randburg Waterfront</p>	<p>KWAZULU – NATAL</p> <p>Zululand reserves / wildlife (i.e. Hluhluwe - Umfolozi Park)</p> <p>Beaches (all-year season)</p> <p>Battlefield routes</p> <p>Drakensberg (scenic, camp sites and hiking trails)</p> <p>Tribal / Zulu culture</p>
<p>MPUMALANGA</p> <p>Kruger National Park</p> <p>Blyde River Canyon</p> <p>Pilgrims Rest (Mining history)</p> <p>Escarpment (e.g. Gods Window)</p> <p>Private Game Lodges (hunting)</p>	<p>NORTHERN CAPE</p> <p>Wildlife (e.g. Kgalagadi Transfrontier Park)</p> <p>Namaqualand Flower route</p> <p>Orange River / Richtersveld</p> <p>Diamonds - City of Kimberly</p> <p>Augrabies Falls National Park</p>
<p>NORTHERN PROVINCE</p> <p>Nature Reserves (e.g. Hans Merensky)</p> <p>Kruger National Park</p> <p>Cultural diversity (e.g. Bakone malapa)</p> <p>Archaeological sites (e.g. Thulamela Caves)</p> <p>Waterberg / Soutpansberg</p>	<p>NORTHWEST PROVINCE</p> <p>Malaria-free wildlife experience</p> <p>Parks</p> <p>Sun City / Lost City</p> <p>Magaliesberg / Hartbeespoort Dam</p> <p>Pilansberg National Park</p>
<p>WESTERN CAPE</p> <p>Table Mountain National Park</p> <p>Fruit and wine farming</p> <p>Garden Route</p> <p>Robben Island (World Heritage Sight)</p> <p>Victoria & Alfred Waterfront</p>	

Please find attached a map of South Africa's nine provinces (Annexure E).

To compile a strategic planning model for provinces, it is imperative to incorporate that the national vision and key success factors (derived from objectives and

strategy) into every provincial strategic plan to ensure that all provinces work towards a national tourism strategy.

3.3 EXISTING NATIONAL STRATEGIC TOURISM PLAN FOR SOUTH AFRICA

Tourism organisations in South Africa, as in the rest of the world, are doing their best to develop tourism into a profitable industry. The government has put forward a national policy (South Africa, 1996(b)) to give provinces a guideline to plan and implement strategic plans to achieve common goals.

For the purpose of this study, Part iv (Four) of the South African White Paper on Tourism (South Africa, 1996(b)) is summarised below. It includes the following aspects:

- A vision for tourism development in South Africa has been compiled as follows:

"As a lead sector and a national priority, tourism will drive the Reconstruction and Development Programme efforts of the government of South Africa. A united, sustainable and competitive tourism industry in South Africa will lead global "best practice" in socially, environmentally and culturally responsible tourism and contribute significantly to the quality of life of all South Africans."
- The following **ten key success factors** have to be met to achieve the above vision for the South African tourism industry:
 - ◇ Tourism industry must be sustainable.
 - ◇ Tourism must involve local communities (including previously disadvantaged groups).
 - ◇ A safe and stable environment for tourism development.
 - ◇ Tourism industry must be competitive, offer quality service and value for money.
 - ◇ It must be customer driven, innovative and responsive to the changing needs of customers.
 - ◇ Emphasise diversity, focus on product development.

- ◇ Tourism training and education for managers and labourers.
- ◇ Creative and aggressive marketing and promotion which involves the local media.
- ◇ Economic linkages must be developed and growth fostered.
- ◇ Appropriate institutional structures must be put in place.
- The strategy for tourism development in South Africa is a simple one, namely:
 - "Environmentally based and people driven".**

The national government proclaimed the above as a guideline and starting point for provincial governments to draw up their strategies, goals, objectives and action plans to develop tourism in their demarcated areas.

Before the existing provincial strategic plans are discussed, the above vision and key success factors, viewed from a national perspective, are evaluated against the eleven key strategic elements that have been discussed in Chapter two. The following are derived from these:

- It is a national document and therefore acceptable as a guide for provincial governments to draw up strategic plans for their respective provinces with their unique environmental, social, economical and infrastructure circumstances in mind.
- The strategy for tourism development is "environmentally based and people driven". If the White Paper elaborated more on the responsibilities of the provincial and local governments to get the local communities involved, the process would speed up.
- Availability of funding for SMME's (tourism related) should have been addressed by elaborating on the national governments commitment towards making funds available for tourism development. The provinces, especially those whose tourism is less developed, cannot ensure tourism sustainability on their own.

The five provincial tourism strategic plans that have been received, will be compared in the next section to determine existing trends in provincial tourism.

3.4 EXISTING PROVINCIAL STRATEGIC TOURISM PLANS IN SOUTH AFRICA

The five provincial strategic plans received will be summarised (Table 3.2), compared and evaluated in light of the above national policies (South Africa, 1996(b)) and the ten success factors and eleven key strategic elements identified for them, as discussed in chapter 2.

Table 3.2 (p. 63-67) shows that the provinces did not follow a similar model or framework to compile their strategic plans. An obvious reason is that in the past the provinces were not guided by a national tourism policy in compiling their strategic plans. Every province used its own strategic planning model to compile a provincial tourism strategic plan. In some instances that resulted in the lack or exclusion of aspects from the national White Paper on Tourism and key strategic elements (see chapter 2) that are important to the development of tourism and the subsequent national tourism objectives.

TABLE 3.2: Five provinces strategic plans for tourism summarised

Step	PROVINCE A	PROVINCE B	PROVINCE C	PROVINCE D	PROVINCE E
1.	Vision statement	Vision	Vision	Policies	Vision, aspirations and principles
2.	Mission statement	Mission	Mission	Vision & Goals	The strategy: An integrated framework for tourism development
3.	SWOT analysis of province's tourism situations	<p>Strategic goals:</p> <ul style="list-style-type: none"> To increase the number of business visitors and all other tourists. To improve the capacity of the tourism industry by stimulating investment, expansion & job creation. To establish world class service standards. To improve the safety and sense of safety of visitors. To harness the support of stakeholders. To expand funding for tourism development and marketing. 	Goals in developing tourism	<p>Principles:</p> <ul style="list-style-type: none"> Support the economic, social & environmental goals of National & Provincial Government. Development of tourism in close co-operation with neighbouring provincial & states. Tourism development underpinned by sustainable environmental practices. Provincial Government must provide efficient policies and provide the necessary infrastructure. Government restricts involvement to enabling private sector to invest in tourism facilities, services & activities. Community involvement, central to all planning, decision making & implementation. Success of tourism requires the support & participation of citizens. 	The competitive environment

TABLE 3.2: Five provinces strategic plans for tourism summarised (continued)

Step	PROVINCE A	PROVINCE B	PROVINCE C	PROVINCE D	PROVINCE E
4.	<p>Objectives for promoting the province:</p> <ul style="list-style-type: none"> • Increase tourist turnover, • Business development, • Customer services. 	<p>Operational objectives:</p> <ul style="list-style-type: none"> • To increase the number of tourists and increase the number of bed-nights. • To increase the tourism spending. • To target and attract business visitors and improve services for business visitors. • To develop a Leisure & Tourism strategy. • To attract investment into the Leisure & Tourism sector. • To develop and attract world class events. • To improve employment opportunities & develop SME's supply to the tourism sector. • To raise awareness of the Leisure and tourism sector to world class service standards. • To improve visitor safety at key tourist venues. • To work with and consult widely with key stakeholders. • To harness the expertise, experience & resources of the private sector. • To contribute to tourism policy at a National, Provincial and Local level. • To liaise with and bid for funds from National & Provincial Government. • To undertake fundraising activities, increase sponsorships and develop joint venture initiatives. 	<p>Tourism policy</p>	<p>Strategic pillars:</p> <ul style="list-style-type: none"> • Tourism management, • Alignment between tourism and other economic sectors, • Tourism growth through diversification and specialisation, • Information and communications technology (ICT), • Enabling linkages. 	<p>Encouraging competition and rivalry</p>

TABLE 3.2: Five provinces strategic plans for tourism summarised (continued)

Step	PROVINCE A	PROVINCE B	PROVINCE C	PROVINCE D	PROVINCE E
5.	<p>Functional strategy:</p> <ul style="list-style-type: none"> • National & International travel markets, • Database, • Research, • Information, services, • Hosting, • Nat. and internat. Travel shows and Conferences, • Communications and tourism awareness campaigns. 	Resources, partnership, leverage and support	Principles underlying the development of tourism	<p>Current position:</p> <ul style="list-style-type: none"> • Location and Regions, • Natural Environment, • Demographics, • Economy, • Land use and Tenure arrangements. <p>Tourism resources, products and support infrastructure.</p> <p>Tourism demand and flow patterns.</p>	<p>Marketing:</p> <ul style="list-style-type: none"> • Approach & Principles • Competitive positioning, branding & imagery • Target markets • Marketing mix
6.	Operations and budgeting	Expenditure	Roles of key players in tourism industry	<p>Framework for tourism growth and development:</p> <ul style="list-style-type: none"> • Tourism potential on a spatial basis, • Tourism markets, • Key success factors. 	<p>Developing Resources:</p> <ul style="list-style-type: none"> • Product development <ul style="list-style-type: none"> - Attractions - Commercial plant & services • Tourism support systems <ul style="list-style-type: none"> - Service quality levels - Intangible resources - Infrastructure - Information & communication

TABLE 3.2: Five provinces strategic plans for tourism summarised (continued)

Step	PROVINCE A	PROVINCE B	PROVINCE C	PROVINCE D	PROVINCE E
7.	Organisational structure	Time frame	Role and structures of provincial tourism organisations	Tourism management system: <ul style="list-style-type: none"> • Points of departure, • Evolution of the Tourism Management System, • Critical assessment of the current system, • National Government, • Provincial Government, • Local Government, • Tourism and Conservation Forums, • Community Tourism Associations (CTA), • Tourism Operators and Travel Agents, • Communities. 	Institutional and financial structures <ul style="list-style-type: none"> • Institutional arrangement, • Funding and financing, • Legislative implications.
8.	Long-term objectives: <ul style="list-style-type: none"> • Increase our share of the SA tourism market to 10%. • Increase average bed occupation rate to 70%. • Facilitate a 20% growth in the development of new products. • Use every resource and events to increase visitor spending. • Increase participation of previously disadvantaged parties. • Facilitate the erection of road signs for 70% of the qualified products. 		Role of local and regional structures in tourism	Implementation programme: <ul style="list-style-type: none"> • Institutional change, • Tourism growth and development programs, • The way forward. 	

TABLE 3.2: Five provinces strategic plans for tourism summarised (continued)

Step	PROVINCE A	PROVINCE B	PROVINCE C	PROVINCE D	PROVINCE E
9.			<p>Key components of the tourism strategy</p> <ul style="list-style-type: none"> • Financing tourism and access to finance. • Product development. • Stimulating investment in tourism. • Tourism marketing. • Safety and security. • Standards, grading and classification of tourism plant and services. • Tour guides. • Tourism in wildlife conservation areas. • Transportation - air and ground. • Tourism awareness. • Communications and public relations. • Tourism training. • Infrastructure development. • Tourism research and information. • Regional co-operation. • Conserving the environment. 		

Firstly, the ten key success factors as shown in the national White Paper on Tourism (South Africa, 1996(b)) will be used to evaluate the five provinces' strategic plans in Table 3.3, to determine how successful they used the White Paper in the compilation of their plans. Secondly, the eleven key strategic elements, as discussed in chapter 2, will be used as criteria in Table 3.4 to determine if all five provincial strategic plans took tourism holistically into consideration or not. Thirdly, the five provincial strategic plans are going to be examined and their similarities and differences are going to be discussed. Similarities in their strategic planning structures will be shown and incorporated into the proposed provincial strategic plan in chapter 5.

3.4.1 EVALUATING THE 5 PROVINCIAL STRATEGIC PLANS AGAINST THE 10 NATIONAL KEY SUCCESS FACTORS

The criteria for measuring the provincial strategic plans according to the ten key success factors as set out in the White Paper on Tourism (South Africa, 1996(b)) in Table 3.3 are as follows:

Criteria	Description
H (high)	Main heading in the strategic plan and discussed extensively
M (medium)	Sub-heading in the strategic plan (discussion was not extensively)
L (low)	Aspect only mentioned or referred to as part of a sub-heading in the strategic plan

By evaluating the existing provincial strategic plans (Table 3.2) against the ten success factors put forward in the National White Paper on Tourism (South Africa, 1996(b)) (Table 3.3), the following can be derived. Each province will be discussed in turn.

- Province A:** The province complied with seven of the ten success factors put forward by the national government (Table 3.3). According to their strategic plan they mainly plan for marketing-related actions. Aspects such as safety and security, training and institutional structures are not mentioned in the strategic plan. These aspects are particularly important for tourism today, because of the crime level in South Africa. Safety and security is one of the aspects most

tourists consider when planning a trip. Training of staff is directly related to quality service, because untrained staff usually do not know how to handle tourists or difficult situations. If institutional structures are not in place, the local community cannot be involved in local tourism.

- **Province B:** This province's strategic plan complied to a medium degree with all ten success factors in the National White Paper (Table 3.3). Safety and security, quality service to tourists, competition and economic linkages for tourism development are an integral part of their strategic plan. Key factors such as sustainability, community involvement, customer needs, product development, staff training and institutional structures are part of the provinces strategic plan. However, they are not seen as separate aspects but rather as part of another aspect. During the evaluation it became clear that these aspects are seen as necessary but not vital. The National White Paper stresses the importance of these aspects as part of their ten success factors for a National Tourism Strategy.
- **Province C:** This province complied to a medium degree with the ten success factors (Table 3.3). The sustainability of tourism, safety and security, training and education of staff, marketing and economic linkages are important parts of this provinces strategic plan. Involvement of local communities, quality service to tourists, tourist needs, product development and creating institutional structures are aspects that this province included in their strategic plan as less important issues. Yet, these aspects are not adhered to, it could negatively affect tourists visiting the province. If a province does not rate quality service or tourist needs, among others, as important, it will not be aware of new trends in the tourism industry. That will result in that province not initiating new products or services pro-actively. In the long term it could have a devastating effect on this province's tourism industry.
- **Province D:** Table 3.3 indicates that this province complied to a medium degree with the ten success factors of the National White Paper on Tourism (South Africa, 1996(b)). This province did a comprehensive strategic plan, including a marketing plan. Two success factors however, were mentioned in

the strategic plan but not discussed, namely a safe and stable environment for tourism development, and tourism training and education for managers and labourers. In South Africa's current safety and security situation it is not sufficient for a province to only mention safety and security. Training of personnel has a direct effect on the quality of service which personnel offer a tourist. As discussed earlier, safety, security and quality service are some of the aspects that could have a negative influence on a prospective tourist's decision to choose a destination. This province discussed the involvement of communities, customer needs, marketing and economic linkages with public, private and foreign countries for the benefit of the province in detail. The strategic plan in Table 3.2 proves this point. A safe and stable environment for tourism development was rated low, but the rest of the success factors were rated medium.

- **Province E:** This province complied to a larger degree than the other four provinces with the criteria, as shown in Table 3.3. The business, economical and marketing aspects form a major part of the strategic plan of this province. Community involvement and incorporation of the previously disadvantaged groups tourism development are also seen as important in the strategic plan. The other aspects form part of the strategic plan, but not as significantly as the previous aspects.

According to the evaluation in Table 3.3 Province C and E have measured up the best with the National Policy's ten key success factors in the White Paper for Tourism (South Africa, 1996(b)).

TABLE 3.3: Evaluating the ten national key success factors against the five provincial strategic tourism plans

TEN KEY SUCCESS FACTORS	PROVINCES														
	A			B			C			D			E		
	L	M	H	L	M	H	L	M	H	L	M	H	L	M	H
Tourism industry must be sustainable.	✓			✓					✓		✓			✓	
Tourism must involve local communities (including previously disadvantaged groups).		✓			✓			✓			✓				✓
A safe and stable environment for tourism development.						✓			✓	✓				✓	
Tourism industry must be competitive, offer quality service and value for money.		✓				✓		✓			✓				✓
It must be customer driven, innovative and responsive to the changing needs of customers.			✓		✓			✓				✓		✓	
Emphasise diversity, focus on product development.	✓				✓			✓			✓				✓
Tourism training and education for managers and labourers.					✓			✓		✓				✓	
Creative and aggressive marketing and promotion. Involve the local media.			✓			✓			✓			✓			✓
Economic linkages must be developed and growth fostered.	✓					✓			✓			✓			✓
Appropriate institutional structures must be put in place.					✓			✓			✓			✓	

3.4.2 EVALUATING THE 5 PROVINCIAL STRATEGIC TOURISM PLANS AGAINST THE 11 KEY STRATEGIC ELEMENTS

In Table 3.4 the provinces' existing tourism strategic plans (Table 3.2) are measured against the eleven key strategic elements discussed in chapter 2. The reason for this evaluation is to determine if the existing tourism strategic plans incorporated these eleven elements and to what extent.

The criteria are as follows:

Criteria	Description
H (high)	Main heading in the strategic plan and discussed extensively
M (medium)	Sub-heading in the strategic plan (discussion was not extensively)
L (low)	Aspect only mentioned or referred to as part of a sub-heading in the strategic plan

- Province A:** According to Table 3.4 this province has a marketing-orientated strategic plan. Attraction / activities and facilities / services are discussed under other headings. On the other hand, hospitality, transport, source of finance and existing competition are only mentioned once or twice under sub-headings in the strategic plan. The following elements are not mentioned or discussed in the provinces strategic plan, namely: safety and security; human resource training and development; legislation, regulation and land tenure and public and private sector tourism organisations.
- Province B:** This province also made marketing a major part of their strategic plan. They went further and also made attraction / activities, facilities / services, safety and security and sources of finance major parts of their strategic plan. Hospitality, transport or existing competition have only been mentioned as part of a sub-section. No planning has been done in this regard. Legislation, regulation and land tenure have not been discussed or do not form part of their strategic plan. It will create a very real problem for tourism developers if the province does not make provision for tourism development in, for example, town planning schemes, building regulations, and land-use rights. If a tourism developer wishes to develop a tourism facility / attraction in a town or city, the absence of proper building regulations or revisions in the existing town planning scheme can result in the development not being approved by the local town council. The developer should be informed of, for example, geological or possible land-use rights problems that could prohibit or cause the project not to be economically viable.
- Province C:** According to Table 3.4 the only elements that are not clearly discussed or omitted, are hospitality; human resource training and

development; existing competition (omitted) and legislation; regulation and land tenure. In the strategic plan, human resource training and development are mentioned only as training communities. No mention is made of training for managers and personnel. Land use is mentioned only by stating that tourism should be a legitimate land use. This province's strategic plan is marketing-orientated.

- **Province D:** To a certain extent (medium rating) all the elements have been incorporated into the provinces strategic plan (Table 3.2). However, marketing, sources of finance, existing competition, legislation, regulation and land tenure, and public and private sector tourism organisations have been incorporated as major elements in their strategic plan. On the other hand, safety and security, as well as human resource training and development, are only mentioned very briefly. Safety, security, human resource training and development should not be overlooked when planning for tourism, because it can have very negative effects on potential tourists' decisions as previously discussed.
- **Province E:** According to Table 3.4 this province was rated the best according to the evaluation (only high and medium ratings). It has an organised strategic plan, but there are a few elements that are mentioned without being given the priority it should have. These elements are hospitality, transport, safety and security, human resource training and development and legislation, regulation and land tenure. This province's strategic plan is very business (financially) orientated. It rates finances, marketing, existing competition, market share, segmentation and income levels much higher than the other elements which relate more to social responsibility. In light of the strategic plan being implemented on a provincial level, it should be borne in mind that a province has a very real social responsibility towards its communities and private role players.

According to the evaluation (Table 3.4) Province D and E have performed the best according to the eleven key strategic elements identified in chapter 2.

TABLE 3.4: Evaluating the five provincial strategic tourism plans against the eleven key strategic elements

ELEVEN KEY STRATEGIC ELEMENTS	PROVINCES														
	A			B			C			D			E		
	L	M	H	L	M	H	L	M	H	L	M	H	L	M	H
Attractions and activities		✓				✓		✓			✓				✓
Hospitality	✓			✓			✓			✓				✓	
Transport	✓			✓					✓	✓				✓	
Facilities and services		✓				✓			✓	✓					✓
Safety and security						✓			✓	✓				✓	
Marketing			✓			✓			✓			✓			✓
Human resource training and development					✓			✓		✓				✓	
Sources of finance	✓					✓			✓			✓			✓
Existing competition	✓			✓								✓			✓
Legislation regulation and land tenure							✓					✓		✓	
Public and private sector tourism organisations					✓			✓		✓			✓		

3.4.3 OTHER COMPARISONS BETWEEN THE PROVINCIAL STRATEGIC TOURISM PLANS

It should be pointed out that all five the above provinces do not have the same resources (human resources, financial, ecological or historically) to their disposal. That is one of the main reasons that the provinces' strategic plans differ, as indicated in Table 3.2. This implies that the provinces should do planning more often to make the best of their situation. The implementation of these provincial strategic plans will also differ because of these reasons.

The five existing provincial strategic plans depicted in Table 3.2 are compared with one another to determine the similarities and differences among them.

- The five existing provincial strategic plans (Table 3.2) have the following similarities:
 - ◊ All start with a vision,
 - ◊ all include missions / principles,
 - ◊ all include a SWOT (Strong & Weak points and Opportunities & Threats) situation analyses (although not all included it as part of their strategic plan),
 - ◊ all have goals, objectives and principles (as part of the provinces' plans in one way or another), and
 - ◊ the five provinces discussed budgets and time frames as a specific stage or as part of another stage in the strategic planning process.
- The five existing provincial strategic plans (Table 3.2) show the following differences:
 - ◊ Two of the five provinces mention policies as a specific stage, while some of them see it as a process to follow later.
 - ◊ The implementation stages of the five provinces differ considerably, particularly the order in which it is to be done.
 - ◊ Province A discusses functional strategy, Province D discusses a tourism management system and Province E mentions institutional and financial structures, as well as marketing, as specific steps.

3.5 CONCLUSION

The objectives as set out for this chapter were handled as follows:

- The provinces' unique tourism circumstances (attractions) pertaining to the ecology, including the provinces' "Big Five" tourism attractions have been discussed and taken into consideration in the evaluation of the existing provincial strategic plans.
- The ten key success factors (South Africa, 1996(b)) for provinces' responsibilities toward tourism development on provincial level have been

discussed and evaluated according to the eleven key strategic elements discussed in chapter 2.

- The five existing provincial tourism strategic plans received have been evaluated according to the ten key success factors (Table 3.3) put forward by the White Paper on Tourism (South Africa, 1996(b)). Provinces C and E measured up the best to these ten key success factors.
- The five existing provincial tourism strategic plans received have been evaluated according to the eleven key strategic elements (Table 3.4) discussed in chapter 2. Provinces D and E measured up the best to these eleven key elements.
- The similarities and differences between the five existing provincial strategic plans have been determined, to be incorporated in the integrated provincial strategic plan (chapter 5).

In the evaluations in Table 3.3 and 3.4 province E received the best rating according to the ten key success factors (South Africa, 1996(b)) and the eleven key strategic elements discussed in chapter 2. This province's strategic planning model will be incorporated into an integrated strategic planning model in chapter 5.

In the tourism industry most of the strategic plans begin with a vision, mission, goals and objectives. The aspects below are discussed in no specific order. The strategic planning models that have been evaluated (Table 3.2), however, show that there is a basic order. The basic order, according to the existing provincial strategic plans (Table 3.2) and models that have been evaluated, is:

- start with a vision,
- evaluate the internal and external environment,
- determine mission, goals and objectives,
- determine goals and objectives in the following categories:
 - ◇ Functional,
 - ◇ Marketing,
 - ◇ Financial,
- action plan,
- control methods, and

- evaluation.

The above order will be incorporated in the integrated provincial strategic planning model to be developed in chapter 5.

Chapter 4 will discuss the results of the questionnaire that the nine provinces completed regarding the eleven key tourism strategic elements and the weight the province allocates to each aspect. Furthermore, this chapter will interpret the questionnaire's results in conjunction with the eleven key strategic elements (chapter 2) and the results of Table 3.3 and Table 3.4 (chapter 3).

CHAPTER 4

RESULTS OF QUESTIONNAIRE

4.1 INTRODUCTION

The questionnaire, Annexure C, measured the level of importance the nine provincial tourism authorities allocated to the aspects that were derived from the eleven key strategic elements, as discussed in Chapter 2. The following Likert scale was used to determine the weight / importance the different provinces allocate to the questions.

WEIGHT	DESCRIPTION
1	No comment
2	Not important
3	Necessary
4	Important
5	Very important

The results of the questionnaire were measured according to the eleven key strategic elements identified by Mathieson and Wall (1982), Inskip (1991), Harrison (1992), Rogers and Slinn (1993), Smith (1995), Lickorish and Jenkins (1997), Saayman (1996(b)) and Myburgh and Saayman (1999). The eleven key strategic elements are:

- Attractions and activities
- Hospitality
- Transport
- Facilities and services
- Safety and security
- Marketing
- Human resource training and development
- Sources of finance
- Existing competition

- Legislation, regulation and land tenure
- Public and private sector tourism organisations

The questionnaire consists of sixty-six questions relating to the above eleven key strategic elements. The sixty-six questions used in the questionnaire have been divided under the relevant eleven key strategic elements. In some instances a specific question was relevant to more than one key strategic element.

The aim of this chapter is to discuss the results of the questionnaire under the relevant eleven key strategic elements (chapter 2) in conjunction with the results of Table 3.3 and Table 3.4 (chapter 3).

4.2 RESULTS OF QUESTIONNAIRE

The following interpretation of the results of the questionnaire have been converted to percentages for discussion purposes.

4.2.1 ATTRACTIONS AND ACTIVITIES

According to chapter 2 attractions and activities are in most cases the basis for tourists' decision to travel.

The purpose of the tourist's visit and the types of attractions are rated as important (average of 90% and 88% respectively) parts of a strategic tourism plan (Figure 4.1). In Table 3.4 (chapter 3) this is reiterated by provinces including this element in their strategic plan. In Table 3.3 all the provinces make provision in their strategic plans for customers' changing needs and product development. Awareness of customers' changing needs will assist the tourism industry in developing the right attractions and activities for their customers. The provinces rate the climate, nature (biomes) and seasonality as necessary to important. It is interesting to note that some provinces do not rate climate (average - 72%), nature (biome) (average - 78%) and seasonality (average - 80%) as important as, for example, questions 10 and 15 (Table 4.1). When the above ratings for climate, biomes and seasonality are compared with one of the ten success factors in Table 3.3, namely that the tourism industry must be sustainable, the lower rating is confirmed. One can assume that these aspects are taken for granted. However, they remain important, because if a tourist wants to visit

a destination he / she will ask about the climate, temperature and type of natural live at the destination. Tourists will not go to Gauteng for a water sport holiday in the June school holidays because it is too cold to swim outdoors in Gauteng in winter.

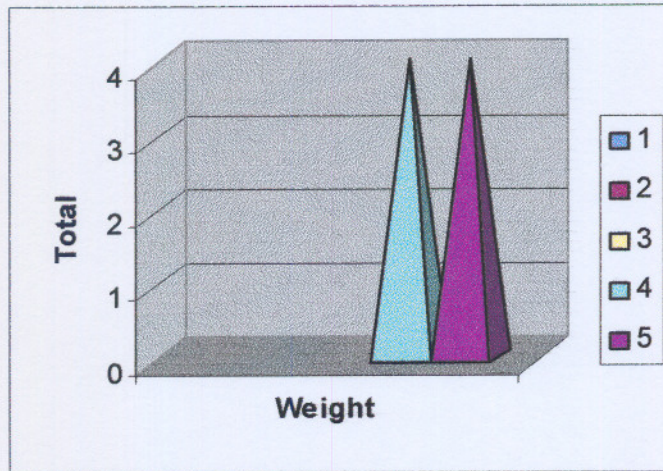


FIGURE 4.1: Purpose of the tourist's visit

TABLE 4.1: Attractions and activities

ASPECTS	RESULTS					Average
	1	2	3	4	5	
1. Climate			50%	37%	13%	72%
10. Purpose of the tourists visit (business or recreation)				50%	50%	90%
15. Types of attractions available in a province			11%	33%	56%	88%
28. Analysis of a provinces tourism products			22%	22%	56%	86%
34. Province's biomes (nature)			50%	12%	38%	78%
35. Seasonality			25%	50%	25%	80%

The analysis of a province's tourism products (question 28, Table 4.1) is rated by 56% of the provinces as very important for the compilation of a strategic tourism plan.

4.2.2 HOSPITALITY

The results in Table 4.2 show that 11% of the provinces did not comment on an aspects such as total number of beds (question 13) and that 11% rate types of catering facilities (question 14) as not important for strategic planning. Furthermore, only 34% of provinces rate the knowledge of total number of beds available and types of catering facilities as very important for a strategic plan. The same result is found in chapter 3, Table 3.4, where the provinces include hospitality in their strategic plans on a low level. This raises the question, of how those provinces plan and organise tourism events if they do not know how many beds or what type of catering facilities are available. If a province can not provide for the accommodation and catering needs of tourists, the tourists will go to neighbouring provinces. This is how leakages of tourist business occur between provinces.

The majority of provinces rate the quality of service in the tourism industry as an important (56%) to very important (33%) part of a strategic tourism plan (Table 4.2). Quality of service is rated in Table 3.3 (chapter 3) as medium to high, according to the existing provincial strategic plans. Duration of a tourist's stay (Figure 4.2) can make the tourists more susceptible for health, safety and security risks. Provinces rated this question at an average of 90%. This question has an effect on marketing facilities, activities, hospitality and transport.

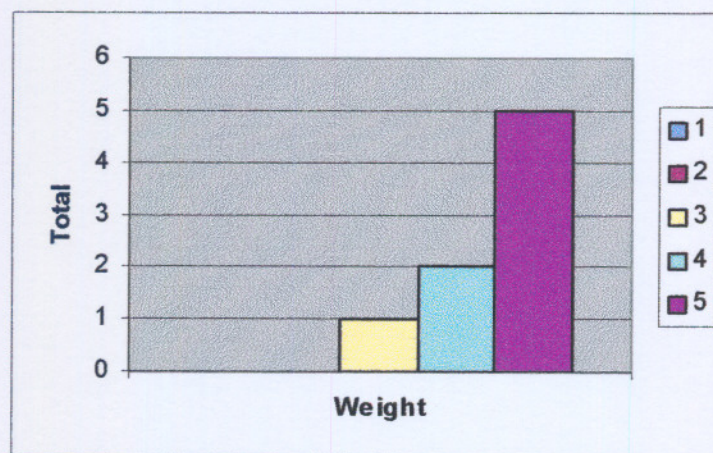


FIGURE 4.2: Tourists' duration of stay

TABLE 4.2: Hospitality

ASPECTS	RESULTS					Average
	1	2	3	4	5	
11. Tourists' duration of stay at a tourist destination			12%	25%	63%	90%
13. Total number of beds available in a province	11%		33%	22%	34%	74%
14. Types of catering facilities available in the province		11%	11%	44%	34%	80%
26. Quality of service			11%	56%	33%	84%

4.2.3 TRANSPORT

An aspect that got a high rating (average - 93%) by all the provinces was the quality of access routes (all modes of transport) (Figure 4.4). The provinces rated availability (Figure 4.3) and uniformity of road signs as 92% (average) and 88% (average) respectively. According to Table 3.4 in chapter 3, the same importance is not reflected in the provinces' existing strategic plans. Only one of the provinces made transport an important and specific part of its strategic plan.

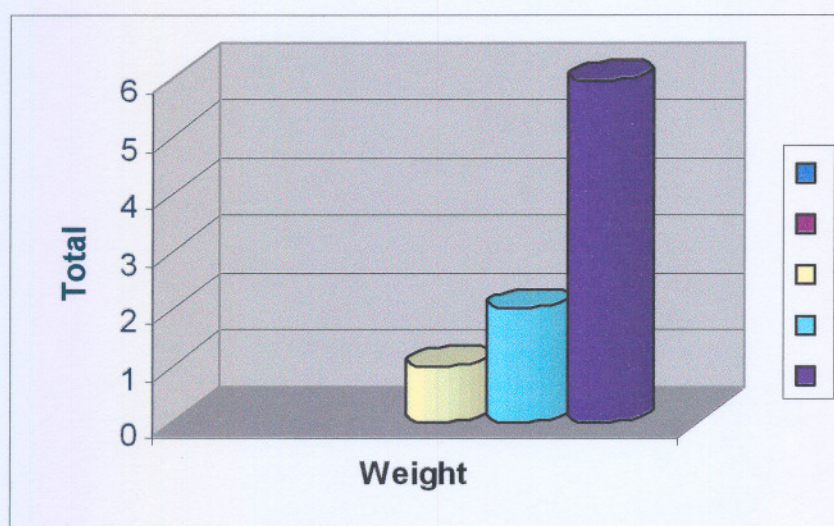


FIGURE 4.3: Availability of road signs

At present the local transport mode used more frequently than any other mode is road transport (buses, coaches, cars, mini buses, cycles and taxis). According to Table 4.3 one of the provinces is of the opinion that the mode, cost or availability (11%) of transport is not necessary for a strategic tourism plan. In chapter 2 it is explained that transport mode (type) and availability are very important, because the type and availability of transport have a definite impact on a tourist's decision to visit a destination or not (2.3.3). It also has an impact on the sustainability of tourism in that province. According to Table 3.3 not all the provinces rated sustainability of the tourism industry as a high priority. Cost of transport mode (average - 68%), travelling time / speed of transport mode (average - 62%) and comfort / luxury of transport mode (average - 70%) are rated lower than the other aspects of transport.

The rail and road systems in South Africa are not always tourism friendly, especially concerning the safety and security of tourists. South Africa's railroad system has been downsized because of financial reasons. As a result passenger trains and passenger routes have been minimised. These route changes negatively affected tourists travelling by rail. The road system, in particular the lack of road signs, sometimes create a situation where tourists get lost in the province and end up in unsafe areas without being aware of it. On the other hand, domestic and international tourists frequently make use of air travel to, from and within South Africa. In South Africa water transport is not as developed as in other countries and it is limited to passenger liners that depart from and arrive in the various harbours of the country, for example Cape Town and Durban.

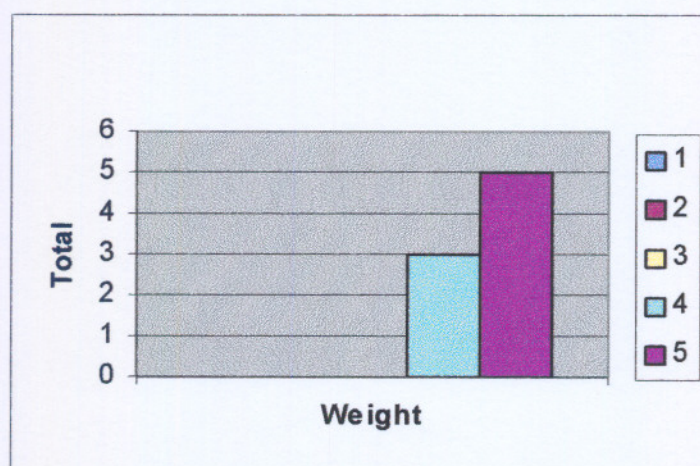


FIGURE: 4.4: Quality of access routes

TABLE 4.3: Transport

ASPECTS	RESULTS					Average
	1	2	3	4	5	
16. Quality of access routes (all modes of transport) to and from a province				37%	63%	92%
17. Mode of transport used by the tourist		11%	22%	11%	56%	82%
18. Cost of transport mode		11%	44%	33%	12%	68%
19. Availability of transport mode		11%	11%	33%	45%	82%
20. Frequency of transport mode			22%	33%	45%	84%
21. Travelling time / speed of transport mode		25%	37%	38%		62%
22. Comfort / luxury of transport mode		25%		75%		70%
32. Road signs – availability			11%	22%	67%	92%
33. Uniform road signs			25%	12%	63%	88%

4.2.4 FACILITIES AND SERVICES

Accommodation is one of the important aspects of tourism facilities, along with hospitality, transport and attractions. The provinces rated the purpose of a tourist's visit at an average of 90% (Figure 4.1). This is good, because it is imperative for a developer or marketer to know what type of tourist to cater for in regard to accommodation, hospitality, transport and recreational activities.

TABLE 4.4: Facilities and services

QUESTIONS	RESULTS					Average
	1	2	3	4	5	
10. Purpose of the tourist's visit (business or recreation)				50%	50%	90%
25. Secondary service organisations (gasoline service stations, laundromats, food stores, etc.)		12%	50%	38%		66%
28. Analysis of a province's tourism products			22%	22%	56%	86%
49. Awareness and providing for disabled people			56%	22%	22%	74%

Secondary services organisations (gasoline service stations, Laundromats, food stores, etc.) are rated a low average of 66%. According to Table 4.4 the majority of provinces rate this aspect not important to necessary (12 % and 50% respectively). This aspect includes police, security, medical services, financial institutions and foreign exchange services that are important for tourists health, safety and monetary security while visiting a destination or province. It is an extension of quality services that should be rendered to tourists and creates business opportunities for entrepreneurs. With the above in mind it is imperative that this aspect be included in a strategic plan.

Tourism facilities should make provision for physically disabled tourists. That can be incorporated in the planning of the tourist facility. Local authorities have in their building regulations prescribed standards for the provision for physically disabled people when a building is constructed public use. This aspect is not rated high (average - 74%) by the provinces. More than 50% of the provinces rate it as necessary, but it is not incorporated in their strategic plans (Chapter 3, Table 3.2). The development in the technology of transport and facilities has opened the door for disabled people to travel to most of the tourist destinations.

According to Table 3.4 facilities and services are incorporated into the provinces' strategic plans. Three provinces (B, C and E) incorporated it as a priority and the

other two provinces (A and D) incorporated this element as part of hospitality, attractions and activities.

4.2.5 SAFETY AND SECURITY

TABLE 4.5: Safety and security

ASPECTS	RESULTS					Average
	1	2	3	4	5	
4. Health-related issues, e.g. HIV / Aids, malaria, cholera	11%	11%	11%	33%	34%	74%
5. Safety and security				22%	78%	96%
9. Location of province			56%	22%	22%	74%
36. Tourism-awareness campaigns			22%	33%	45%	84%
38. Informing tourists of crime prevention measures that the local police are implementing and possible danger areas or situations which should be avoided during their stay		12%	38%	25%	25%	72%

Table 4.5 shows the responses of the provinces on questions relating to safety and security.

The provinces gave safety and security (Figure 4.5) one of the highest average ratings of 96%. The nine provinces rated safety and security as follows: 78% rated it as very important and 22% rated it as important. This response is to be expected, because of all the publicity given to crime in South Africa, as well as the negative impact it is having on the international tourism growth. Unfortunately it is not enough for a province only to take note of the present safety and security situation. They have to investigate ways and means to alleviate the possible danger tourists could face.

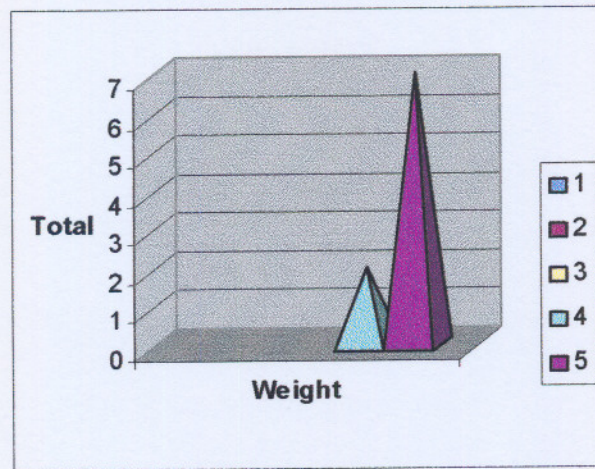


FIGURE 4.5: Safety and security

The safety and security of all tourists should be one of the priorities in a strategic plan for a province. Some provinces have a bigger problem with safety and security than other provinces. Gauteng, for example, is geographically the smallest province but has one of the largest crime rates and populations in South Africa. The provinces rated safety and security as very important, but according to Table 3.3 and Table 3.4 in chapter 3, this aspect was not rated to be important. However, in Table 3.3 and Table 3.4, provinces B and C rated this aspect as high and made it a significant part of their strategic tourism plan.

The ratings for the aspects are much lower than the rest. These aspects are the location of the province in South Africa (average - 74%), health-related issues, such as HIV / Aids, malaria, cholera (average - 74%) and informing tourists of crime prevention measures that the local police are implementing and possible danger areas or situations which should be avoided during their stay (average - 72%). It is important for the safety of the tourists to inform them of possible safety and security risks and of measures the national and local police have implemented to prevent negative actions against tourists in particular. It is also necessary to give information on the location of police offices, hospitals or clinics and relevant telephone numbers in case of an emergency.

The province's location (average - 74%) is not only important when assessing the safety and security situation. It is also important for marketing, facilities planning, assessing the effect of seasonality on tourists, what biomes are available (nature) and what type of transport mode is available or necessary to provide.

Three provinces rated health issues as necessary to not important for incorporation in a province's strategic tourism plan. Health-related issues are also part of the safety and security problems for tourists in South Africa. If tourists (local or international) are not properly informed of the HIV / AIDS, malaria (certain areas) or cholera situation in the provinces they may be at risk. Tourists may visit risk areas without knowing that precautions must be taken when drinking water from a river or that they should get the necessary vaccine before going into a malaria-infected area. Provinces rate giving information to tourists at an average of 72% which is low in relation to the other aspects. One province rated this aspect as not important (12%) for a strategic plan. Two provinces rated this question as necessary (38%) and 50% rated it as important to very important.

The provinces rated the safety and security (Figure 4.4) aspect as one of the highest average (96%). Although there is a health problem in South Africa pertaining to HIV / AIDS and cholera, the provinces rated it 74%. Two of the nine provinces rated the above as not important and not to be incorporated in a province's strategic plan. This is also seen in Table 3.3 and Table 3.4 where safety and security are seen as not important and in some instances even left out of a provincial strategic plan. The majority of the provinces rate the tourism awareness campaigns as important (33%) and very important (45%). The involvement of the local community can have a significant effect on the safety and security of that area. They can be involved with arts, crafts and cultural events for tourists. The effect can have a positive financial impact on the local community (job creation and multiplier effect on the local economy). The involvement of the local community will ensure a tourism-friendly environment in which a tourist feels safe and welcome.

4.2.6 MARKETING

Aspects such as the prevailing climate (average - 72%), location of the province / destination (average - 74%), pricing strategies (average - 76%), province's biomes (average - 78%) and seasonality (average - 80%) got results of 80% on average and below. This is information that is relevant to the choice a potential and future tourist will make about the respective province / destination. If a person is going to a destination for business purposes, then aspects such as the climate, seasonality, nature (biomes) and location of the province / destination is not a major issue.

However, they are recreational tourists, the above aspects are relevant and will have a negative or positive effect on the tourist's choice. More than 50% of the provinces indicated that climate, location of province and province nature (biomes) should be part of a strategic tourism plan, but not a high priority. This could be because the provinces see it as a fixed and something over which they have no control.

Provinces do not rate tourist information as a high priority and do not consider it as important to incorporate in their strategic plans ways of informing tourists of tourist-related issues. Although it is not a good policy to inform tourists of negative aspects in the country they are touring, it is unacceptable to withhold life-threatening information from potential tourists, such as health-related issues, (for example malaria, cholera) safety issues and security situations that could be harmful to tourists.

Promotion strategy (Figure 4.6) was rated one of the most important aspects, with an average of 96%. 78% of provinces rated this element as a very important part of a strategic tourism plan.

Marketing is the only element that was rated as high in both Table 3.3 and Table 3.4 (chapter 3). In all the strategic plans (Table 3.2, chapter 3) marketing is an important part of the province's strategic tourism plans.

Purpose of the tourists visit (average - 90%), duration of stay at a destination (average - 90%) and the tourists' expenditure during their stay (average - 88%) is important in marketing because it determines to a great extent the focus point of the marketing and the type of market. This information is important when drawing up a marketing plan to establish the market size and socio-economic status of the potential tourist market and economic impact for the province's tourism market.

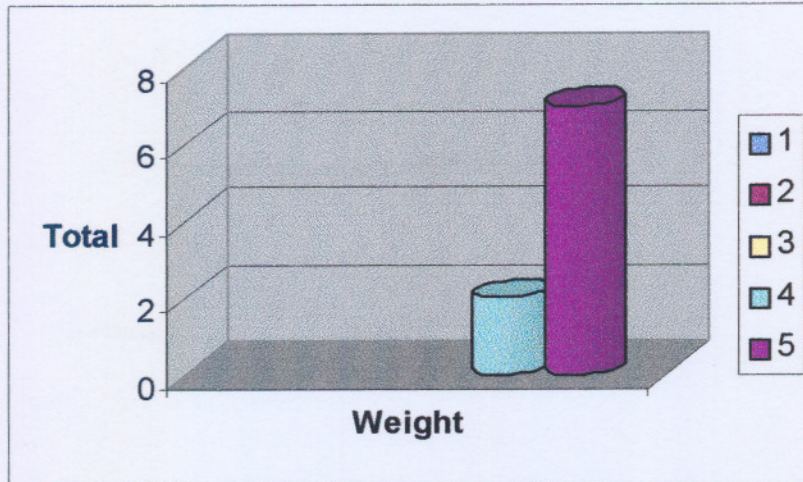


FIGURE 4.6: Promotion strategy

TABLE 4.6: Marketing

ASPECTS	RESULTS					Average
	1	2	3	4	5	
1. Climate			50%	38%	12%	72%
8. Promotion strategy				22%	78%	96%
9. Location of province			56%	22%	22%	74%
10. Purpose of the tourist's visit (business or recreation)				50%	50%	90%
11. Tourist's duration of stay at a tourist destination			12%	25%	63%	90%
12. Tourist's expenditure during their stay			25%	12%	63%	88%
29. Pricing strategies			38%	50%	12%	76%
31. Information Technology (IT)			11%	44%	45%	86%
34. Province's biomes			50%	12%	38%	78%
35. Seasonality			25%	50%	25%	80%
42. Mechanism for acquiring tourism statistics (research)				44%	56%	92%

The marketing of tourism destinations have also changed with the development of Internet and e-mail. Almost all of the provinces rated information technology (IT) as an important (44%) to very important (45%) part of a province's strategic tourism plan. In light of the globalisation of the tourism market, the above technological developments are important for a province to be incorporated into the tourism market of a province to ensure that the relevant information may be obtained when needed. Market the province on the Internet means the province is marketed world-wide, to the benefit of the province, its communities, tourism industry and even the country.

Provinces rated the mechanism for acquiring tourism statistics (research) as a very important (56%) to important (44%) part of strategic tourism plans (Figure 4.7). If a proper mechanism exists within a province to gather tourism statistics, better facilities and services could be developed. The tourism industry in that province knows what the need of potential tourists are. It will be to the benefit of the province to draw up a provincial strategic tourism plan according to existing figures and costs.

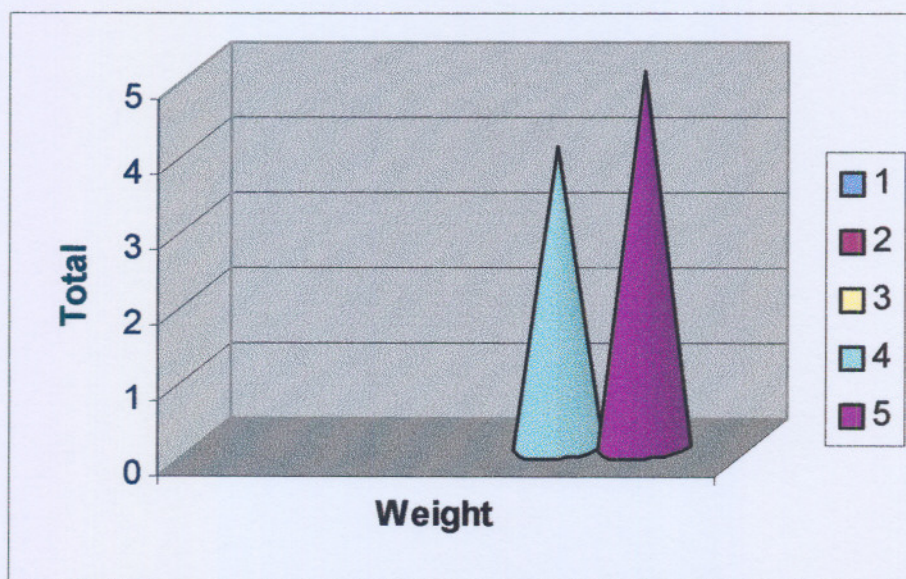


FIGURE 4.7: Research

4.2.7 HUMAN RESOURCE TRAINING AND DEVELOPMENT

Staff attitudes towards tourists (average - 88%)(Table 4.7) is arguably one of the most important aspects in the tourism industry. If a tourist visits a province / destination and the staff's attitude towards him / her is negative, that tourist will not

return or refer other tourists to that province / destination. Staff attitude is an important part of the service to the tourist visiting the province. Yet, not all of the provinces regard this aspect with the necessary attention. According to Table 3.3 and Table 3.4 (chapter 3) province A excluded training of staff and province D made mention of staff training and development on a low level. Provinces B, C and E incorporated staff training and development in their strategic plans as part of a sub-heading. In light of the above it could safely be said that the provinces as a whole do not rate staff training and development as a high priority.

If tourism staff are not properly trained to handle tourists and problem situations, they cannot be expected to have positive attitudes or to know what is quality service. The training of staff working with tourists received 82% (average) which is not good, because the quality of service that tourists receive in South Africa is not good. Only 45% of the provinces rated training and development of staff as very important and indicated that it should form part of a strategic tourism plan for a province. According to Van der Merwe (1999:30) the ultimate purpose of training is to help the tourism industry to improve its operational effectiveness, growth, economic and competitive performance, including the ability to cope with future challenges.

In general the provinces do not regard the establishment of new tourism businesses (Table 4.7, average - 74%) as very important in relation to other aspects.

Tourism awareness campaigns (average - 84%)(Table 4.7) by national and provincial government are needed to educate communities on tourism and its impacts on their community's economy, society (safety and security) and environment. These campaigns could be implemented by SMME's, as discussed in the next section (4.2.8).

The majority of provinces rated these awareness campaigns as an important (33%) to very important (45%) part of a province's strategic plan (Table 4.7). This higher rating could be due to the fact that awareness campaigns are seen as part of tourism development culture.

TABLE 4.7: Human resource training and development

ASPECTS	RESULTS					Average
	1	2	3	4	5	
30. Tourism staff attitude			12%	38%	50%	88%
36. Tourism awareness campaigns			22%	33%	45%	84%
37. Training and development of staff members			33%	22%	45%	82%
45. Province's involvement in establishing new tourism businesses	11%		22%	45%	22%	74%

4.2.8 FINANCE / FUNDING

The results in Table 4.8 give a negative impression of assistance (financially or otherwise) at provincial level for a prospective tourism developer. In Table 4.8 provinces rated the aspects dealing with funding or assisting with funding on provincial level as follows: accessibility of finance for developers (72% - average), province's involvement in establishing new tourism businesses (74% - average) and financing of tourism development / projects (74% - average). In comparison to other aspects it is a low average. A reason for these low averages could be that provinces do not have money to assist tourism development, but play a facilitating role between national government, other financial resources and tourism developers.

Provinces are positive and rate their involvement in accessing national and international funding for tourism development as very important (67%). They also rate its inclusion in a strategic plan as very important. On the other hand, 22% of the provinces rated this aspect as not important and not necessary to be incorporated into a provincial strategic tourism plan. This aspect of funding should be quantified within the province's strategic tourism plan.

In Table 3.3 and Table 3.4 only province A incorporated this aspect (element) on a low level. Provinces B, C, D and E made it clear in their strategic plans that economic linkages and sourcing of finances are a high priority. The results of the questionnaire

that has been completed by all nine provinces as listed in Table 4.8 do not correlate with the above findings in Table 3.3 and Table 3.4.

According to Table 4.8 the provinces have different opinions on the importance of financing of tourism developers from a provincial level. The provinces rate accessibility of finances for developers, provinces' involvement in establishing new tourism businesses and financing of tourism projects from not important through to very important for a strategic tourism plan. It could be that provinces understood this question as obligating the province to budget for tourism development. This is not the case. The provinces only fund tourism projects or development to a limited extent.

Utilising of SMME's (small, medium and macro enterprises) when conducting awareness campaigns and as part of a strategic plan, has not been rated high (average of 74%). Not one province rated this aspect as very important.

According to Table 3.3 (chapter 3) the majority of the provinces rate the involvement of local communities on a medium level. Only one province rated this point as high. The involvement of the local community is important for tourism to be sustainable and to ensure that the community gives their support for tourism development. If the local community benefits financially from, tourism they will support it (Myburgh and Saayman, 1999:90).

TABLE 4.8: Finance / Funding

ASPECTS	RESULTS					Average
	1	2	3	4	5	
23. The involvement of the local community			12%	25%	63%	90%
40. Utilising SMME's (small, medium and macro enterprises) when conducting awareness campaigns in a province			33%	67%		74%
41. Analysing local SMME's for possible tourism development or funding of emerging tourism entrepreneurs			33%	33%	34%	80%
44. Accessibility of finance for developers	12%	13%	12%	25%	38%	72%
45. Province's involvement in establishing new tourism businesses	11%		22%	45%	22%	74%
46. Financing of tourism development / projects	11%		22%	45%	22%	74%
47. Provincial government's involvement in accessing national and international funding for tourism development		22%		11%	67%	84%

4.2.9 EXISTING COMPETITION

Provinces have to identify their competition in the tourism market locally and internationally. The nine provinces will be competing for the same number of international tourists coming to South Africa as well as domestic tourists visiting their provinces' tourism destinations. Although certain provinces have an advantage in the present South African tourism market with regard to natural resources. According to Table 4.9 the provinces on average did not rate the globalisation of tourism (average - 76%) or analysis of the external environment (average - 80%) as very important, compared to other aspects. Although 56% of provinces did rate the analysis of the external environment as very important, 11% of the provinces rated the same aspect as not important to a strategic plan. Table 3.4 (chapter 3) shows that province C excluded this element (existing competition) and provinces A and B included it on a

low level in their respective strategic plans. Provinces D and E incorporated the competition element as a high priority in their respective strategic plans. A comparison of the results from Table 4.9 with the evaluation of Table 3.4 shows that what the provinces indicated in the results, is applied in the existing strategic plans. A reason for the lower rating of globalisation can be that certain provinces are not aware of the effect of globalisation on the tourism industry.

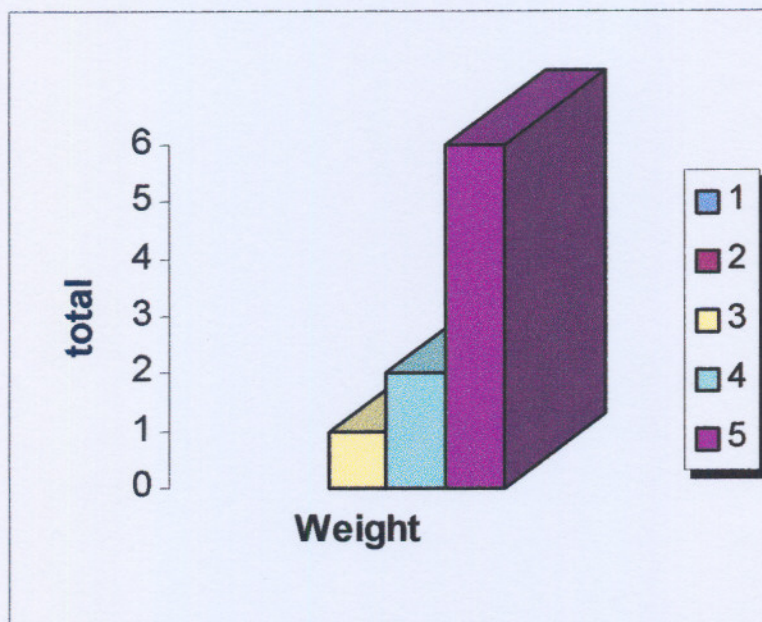


FIGURE 4.8: Analysing existing competitors

TABLE 4.9: Existing competition

ASPECTS	RESULTS					Average
	1	2	3	4	5	
50. Analysing existing competitors for a province			11%	22%	67%	92%
54. Globalisation of tourism			45%	33%	22%	76%
55. Analysing key success factors			11%	44%	45%	86%
56. Analysing the external environment	11%		22%	11%	56%	80%

Figure 4.9 reveals that 67% of provinces consider an analysis of existing competition as very important and felt that it should form part of a strategic plan. The provinces rated this aspect at 92% average.

The analysis of key success factors, which is part of the provinces' strategic planning process especially related to the SWOT-analyses and strategy formulation, was rated 86% average. This aspect was rated in Table 4.9 as important (44%) to very important (45%) for inclusion in a provincial strategic plan.

Taking the above information into account it could be said that the majority of provinces do not perceive their neighbouring provinces as their direct threat. This type of perception will have to be changed for a provincial tourism organisation (public or private) to be able to assist tourism developers to the benefit of the province and its communities.

4.2.10 LEGISLATION, REGULATIONS AND LAND TENURE

The response of the provinces on legislative matters, particularly at local level, was rated very low (all were rated below 80%). This low rating is reiterated in Table 3.3 (chapter 3) where only two of the five provinces mentioned these aspects (safe and stable environment for tourism development) as an important part of their strategic plans. One of the provinces did not include these aspects at all. The national and provincial boards / authorities did not receive an average higher than 86%. According to Table 3.3 (chapter 3) one province did not include this aspect and the rest of the provinces included it as part of another point. Province B incorporated government structures under Operational Objectives, according to Table 3.2 (chapter 3). Local authorities and their legislation received a below 80% average. It proves that the communication between provincial and local level is not up to standard and that is why provinces do not always see the benefit of involving local authorities in the planning and implementing phases of tourism development. One of the provinces made specific reference to the inclusion of the local communities and therefore also the local authority. The rest of the provinces made reference to a lesser extent to the inclusion of the local communities.

The nine provinces agree that policy papers such as the White Paper on Tourism (average - 86%)(Table 4.10), should be incorporated in a provincial strategic tourism

plan. According to Table 3.4 (chapter 3) it is not the case in the majority of provinces' existing strategic plans.

When development in tourism is implemented in a specific area of a province, the area will automatically fall within the jurisdiction of a local authority or district council, in which a town planning scheme will be applicable.

The provinces rated the importance of land-use rights at an average of 72% (Table 4.10) and legislation, regulation and land tenure (use) at an average of 70% which is low in relation to the other aspects. Only 12% of the provinces rated this point to be an important part of their strategic plans. Even the Environmental Impact Analysis (EIA) was rated an average of 78%. The fact that the EIA is being made mandatory by legislation for tourism development (in natural sensitive areas), could be the reason why the provinces rated it as low.

Other aspects that have been rated a 72% and below average, are local municipal building regulations, women in tourism, compatibility of existing legislation and the effect of local legislation and regulations on international tourists.

TABLE 4.10: Legislation, regulations and land tenure

ASPECTS	RESULTS					Average
	1	2	3	4	5	
3. Policy papers, e.g. White paper on Tourism			22%	22%	56%	86%
6. Local municipalities' building regulations		33%	45%	11%	11%	60%
7. Land use rights			50%	38%	12%	72%
27. An Environmental Impact Analysis (EIA)			25%	63%	12%	78%
43. Transformation of the tourism industry		11%	11%	22%	56%	84%
48. Women in tourism		11%	45%	22%	22%	72%

TABLE 4.10: Legislation, regulations and land tenure (continued)

ASPECTS	RESULTS					Average
	1	2	3	4	5	
51. Legislation, regulations and land tenure (use)		12%	38%	38%	12%	70%
52. Compatibility of existing legislation, regulations and land tenure (use)		22%	22%	34%	22%	72%
53. The effect of local legislation and regulations on international tourists visiting your province (e.g. customs, import and export of items and taxes)	11%	11%	33%	34%	11%	64%

In Table 3.4 in chapter 3, a similar rating was given when the provinces' existing strategic plans were evaluated against the elements described in chapter 2. Province A and B did not include this element in their strategic plans, whereas province D incorporated legislation and regulations as a priority in their strategic plan. Province C and E also incorporated legislation and regulations into their strategic plans but to a lesser extent (Table 3.4, chapter 3).

4.2.11 PUBLIC AND PRIVATE SECTOR TOURISM ORGANISATIONS

Aspects such as the involvement of the local community (average - 90%)(Figure 4.9) and the involvement of the local, regional and provincial tourism organisations / boards (average - 88%) as shown in Table 4.11, were rated as a high priority for provincial strategic plans. On the other hand, the provinces rated local authorities (average 78%), regional tourism organisations (average 78%) and non-governmental organisations (average 74%) as low priority to be included in their strategic plans. Provinces B, C, D and E included this element in their strategic plans as part of a sub-heading and therefore it was rated on a medium level (see chapter 3, Table 3.3 and Table 3.4). If the local authority or non-governmental organisations are not perceived as important parts of provinces' strategic plans, the provinces will encounter difficulties in contacting or communicating with the relevant community structures.

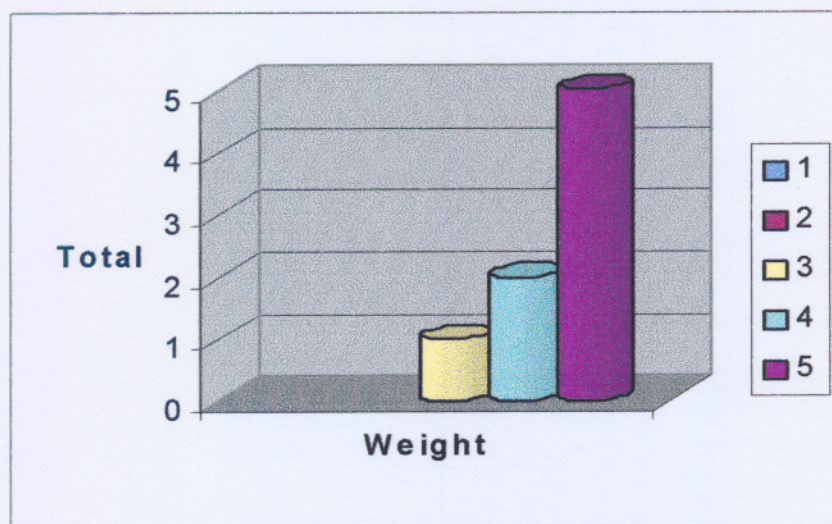


FIGURE 4.9: Involvement of local community

The provinces rated the creation of more SMME's as 37% important and 38% as very important parts of a provincial strategic tourism plan. This, along with involving local authorities, could be some of the avenues provinces could utilise to develop tourism on a local level. According to the results of Table 4.11, the provinces' ratings are not consistent because the ratings for SMME's are low, but they rate tourism-related private proprietors and private companies as an average of 88%, which is a high rating. Another inconsistency is tourism structures at local, regional and provincial level, which are rated an average of 86%, whereas local authorities are rated an average of 78%. It could be that provinces do not always understand or rate the involvement of SMME's, private proprietors, private companies and local authority as an important part of tourism development. This could have been true in the past, when tourism development was centred at major tourism attractions.

The emphasis of tourism development is shifting to local level in rural areas because tourism is seen as an economic benefit to the local and rural communities.

The National Parks Board was rated by 25% of the provinces as not important, because not all the provinces have a parks board in their provinces (Table 2.1, chapter 2). On the other hand, SATOUR, Provincial Tourism Departments, Provincial Tourism Authorities / Boards, tourism-related private proprietors and private companies were rated by the provinces between 84% and 88% average, which is higher than the other relevant aspects.

According to Table 4.11, the rest of the aspects were rated from 80% to 86%, which is average. Tables 3.3 and 3.4 reiterate their inclusion in the existing strategic plans.

TABLE 4.11: Public and private sector tourism organisations

ASPECTS	RESULTS					Average
	1	2	3	4	5	
2. Tourism structures at local, regional and provincial level		11%		33%	56%	86%
23. The involvement of the local community			12%	25%	63%	90%
24. The involvement of the local, regional and provincial tourism organisations / boards		12%		25%	63%	88%
39. Creating more SMME's (small, medium and macro enterprises)			25%	37%	38%	82%
40. Utilising SMME's (small, medium and macro enterprises) when conducting awareness campaigns in a province			33%	67%		74%
57. National Department of Environmental Affairs and Tourism	11%		22%	11%	56%	80%
58. SATOUR			25%	25%	50%	86%
59. National Parks Board	12%	13%		50%	25%	72%
60. Provincial Tourism Departments			11%	56%	33%	84%
61. Provincial Tourism Authorities / Boards				67%	33%	86%
62. Regional Councils			22%	56%	22%	80%
63. Regional Tourism Organisations		11%	22%	33%	34%	78%
64. Local Authorities			50%	12%	38%	78%
65. Non-Governmental Organisations (tourism-related)		22%	11%	45%	22%	74%
66. Tourism-related private proprietors and private companies.				56%	44%	88%

4.3 CONCLUSION

The aspects listed below in Table 4.12 got the highest rating according to the results of the questionnaire completed by the nine provinces.

The objective of this chapter was to discuss the results of the questionnaire with reference to the relevant eleven key strategic elements (chapter 2, section 2.3) in combination with the results of Table 3.3 and Table 3.4 (chapter 3).

The nine aspects illustrated in Table 4.12 have been listed from the highest to the lowest score on average. These aspects have been discussed as part of the evaluations under each key strategic element derived from chapter 2 and they were depicted graphically (see Figure 2.1).

The following conclusions can be made from the information obtained in Table 4.12. The majority of aspects are marketing-related, for example promotion strategy (96%), quality of access routes (92%), purpose of the tourist's visit (90%), tourists' duration of stay at the destination (90%), availability of road signs (92%) and mechanism for acquiring tourism statistics (92%). As mentioned in chapter 3, most of the provinces concentrate the majority of their strategic planning on marketing. Safety and security received one of the highest ratings, namely 96%. The present safety and security situation in South Africa forces all tourism-related organisations to take this element into serious consideration when compiling a provincial strategic plan for tourism. It could be assumed that those aspects that were rated the highest by the provinces are also the aspects with which the provinces have problems. In chapter 5 (conclusions and recommendations) these aspects will be addressed within the context of a strategic planning model for provincial tourism.

TABLE 4.12: Aspects with the highest average rating

ASPECTS	RESULTS					Average
	1	2	3	4	5	
5. Safety and security				22%	78%	96%
8. Promotion strategy				22%	78%	96%
16. Quality of access routes (all modes of transport) to and from a province				37%	63%	92%
32. Road signs – availability			11%	22%	67%	92%
42. Mechanism for acquiring tourism statistics				44%	56%	92%
50. Analysing existing competitors of a province			11%	22%	67%	92%
10. Purpose of the tourists visit (business or recreation)				50%	50%	90%
23. The involvement of the local community			12%	25%	63%	90%
11. Tourists' duration of stay at a tourist destination			12%	25%	63%	90%

Since the inception of the new government in 1994 the involvement of the community has been made compulsory for any tourism project or the organising of community tourism events. This aspect received a 90% average rating.

The majority of provinces are investigating ways and means to get a bigger slice of the South African tourism "cake" (domestic and international tourists). This can be a reason why the provinces rated the analysis of existing competitors at 92% average.

For provinces to be able to compete with the rest of the world, they will have to include the following into their strategic tourism planning:

- Quality of service.
- Training of staff.
- Assisting / funding SMME's.
- Dissemination of information, internal and external (IT).

In chapter 5 the conclusions and recommendations pertaining to this study will be presented. A strategic planning model for provincial tourism will be compiled with information gathered in the previous chapters of this study.

CHAPTER 5

CONCLUSIONS AND RECOMMENDATIONS

5.1 INTRODUCTION

This study was done to assist provincial tourism authorities with strategic planning for tourism in their respective provinces. An attempt was made to develop a strategic tourism planning model that could be implemented by the nine provincial tourism authorities.

The problem this study wanted to address was:

Which strategic planning model is suitable for the development of tourism in a province?

From this the following **primary objective** was identified:

- Develop a strategic planning model for provincial authorities.

In order to achieve the primary objective the following **secondary aims** were identified:

1. Identify the key strategic elements that have to be part of strategic tourism planning. These were dealt with in chapter 2.
2. A literature study was done of relevant sources to show the need and importance of each identified key element for strategic tourism planning. This was dealt with in chapter 2.
3. Identify the importance and influence of a tourist's decision on strategic tourism planning. Chapter 2 dealt with this issue.
4. Discuss the provinces' unique tourism circumstances (attractions) relating to the ecology, including the provinces' "Big Five" tourism attractions. Chapter 2 dealt with this issue.
5. Extract relevant information from the existing national strategic tourism plan (White Paper on Tourism, 1996) regarding provinces' responsibilities towards tourism development on provincial level. This issue was dealt with in chapter 3.

6. Evaluate the five existing provincial strategic tourism plans received against the ten success factors put forward by the White Paper on Tourism (South Africa, 1996(b)). Chapter 3 dealt with this issue.
7. Evaluate the five existing provincial strategic tourism plans received against the eleven key strategic elements discussed in chapter 2. This issue was dealt with in chapter 3.
8. Determine the similarities and differences between the five existing provincial strategic plans. Chapter 3 dealt with this issue.
9. Distribute questionnaires to the nine provinces to ascertain the *status quo* of provincial tourism and get their reaction on identified tourism elements and aspects. This issue was dealt with in chapter 4.
10. Interpret the results of the questionnaire in the context of the eleven key strategic elements discussed in chapter 2 and in the context of the results of Table 3.3 and Table 3.4, discussed in chapter 3. This issue was dealt with in chapter 4.

Research information was obtained from the nine provinces, literature on management and tourism science, national legislation, discussions with fellow-researchers and qualified people working in the field of this study. The following conclusions can be drawn based on the above information and sources.

5.2 CONCLUSIONS OF THE STUDY

The following conclusions based on the eleven key strategic elements compiled in chapter 2.

- **Attractions and activities (Table 4.1)**
 - ◊ The purpose of the tourist's visit and types of attractions are rated as important (average of 90% and 88% respectively) parts of a strategic tourism plan (see Figure 4.1).
 - ◊ In Table 3.4 (chapter 3) the above is reiterated by including this element in provinces' strategic plan.

- ◇ According to Table 3.3 all the provinces make provision in their strategic plans for customers' changing needs and product development.
 - ◇ 50% of provinces rated climate, biomes and seasonality as necessary to not important for a provincial strategic tourism plan.
 - ◇ More than half (56%) of the provinces rated the analysis of a province's tourism products as very important for a provincial strategic tourism plan.
- **Hospitality (Table 4.2)**
 - ◇ 11% of the provinces do comment on an aspect such as total number of beds and 11% rate types of catering facilities as not important for a strategic tourism plan.
 - ◇ The same result is found in Table 3.4, chapter 3, where the provinces include hospitality in their strategic plans on a low level.
 - ◇ Quality of service got an average of 84% from the provinces. That is an average score in relation to the other questions evaluated. The provinces rated this aspect as important (56%) or very important (33%) for inclusion in a provincial strategic tourism plan.
 - ◇ Duration of a tourists' stay (Figure 4.2) received an average of 90%. That is high and puts it in the top nine (Table 4.12) aspects. This aspect has been rated by 63% of the provinces as very important and by 25% as important for a province's strategic tourism plan.
- **Transport (Table 4.3)**
 - ◇ The quality of access routes and availability of road signs got the second highest ratings (average - 92%) by all the provinces.
 - ◇ 11% of the provinces are of the opinion that transport mode and the cost and availability of transport are not necessary for a province's strategic tourism plan.
 - ◇ The cost of transport mode (average - 68%), travelling time / speed of transport mode (average - 62%) and comfort / luxury of transport mode (average - 70%) are rated lower than the other aspects of transport.

- ◇ According to Table 3.4 in chapter 3, the same importance is not reflected in the provinces' existing strategic plans.
 - ◇ According to Table 3.3 not all the provinces rate sustainability of the tourism industry as a high priority.
- **Facilities and services (Table 4.4)**
 - ◇ Purpose of the tourists' visit (business or recreation) is rated an average of 90% for inclusion in a province's strategic tourism plan.
 - ◇ Secondary service organisations (gasoline service stations, laundromats, food stores, etc.) are rated a low average of 66%. According to Table 4.4 the majority of provinces rate this aspect as not important to necessary (12 % and 50% respectively).
 - ◇ The awareness of provision for disabled people are rated by the provinces as a low average of 74%. More than 50% of the provinces rate it as necessary but they do not incorporate it in their strategic plans (Table 3.2, chapter 3).
 - ◇ According to Table 3.4 (chapter 3) three provinces (B, C and E) incorporated this element as a priority and the other two provinces (A and D) incorporated this element as part of another aspect.
 - **Safety and security (Table 4.5)**
 - ◇ The provinces rated safety and security (Figure 4.5) at one of the highest average ratings of 96%. The nine provinces rated safety and security as follows: 78% as very important and 22% as important.
 - ◇ The following three aspects of this element received low averages: location of province (74%), health-related issues (for example HIV / Aids malaria, cholera (74%)) and informing tourists of crime prevention measures that the local police are implementing and possible danger areas or situations which should be avoided during their stay (72%).

- ◇ 22% of the provinces had no comment on the above health issues as or did not consider it important to be included in the province's strategic tourism plan.
- ◇ The provinces considered safety and security as very important, but according to Table 3.3 and Table 3.4 in chapter 3 they rated this aspect as not important. However, in the same Tables two of the provinces (provinces B and C) rated this aspect as high and made it a significant part of their strategic plan.
- ◇ The majority of the provinces rate the tourism awareness campaigns as important (33%) and very important (45%) parts of a provincial strategic tourism plan.

- **Marketing (Table 4.6)**

- ◇ The following aspects which are important information for a marketing strategy got ratings of 80% and below average:
 - Climate : 72% average
 - Location of the Province : 74% average
 - Pricing strategy : 76% average
 - Province's biomes : 78% average
 - Seasonality : 80% average
- ◇ Promotion strategy (Figure 4.6) was rated one of the important aspects with an average of 96%. This aspect was rated by 78% of provinces as an important part of a provincial strategic tourism plan.
- ◇ The following aspects, which to a great extent determine the focus point of the marketing and type of market, were rated high to medium:
 - purpose of the tourists visit (average - 90%),
 - duration of stay at a destination (average - 90%) and
 - tourist's expenditure during his / her stay (average - 88%).

- ◇ The provinces rated information technology (IT) as 44% - important and 45% - very important part of a province's strategic tourism plan.
 - ◇ Provinces rated the mechanism for acquiring tourism statistics (Figure 4.7) as a very important (56%) to important (44%) part of strategic tourism plans.
 - ◇ Marketing is the only element that was rated as high by all five provinces in Table 3.3 and Table 3.4 in chapter 3.
- **Human resource training and development (Table 4.7)**
 - ◇ Staff attitude towards tourists is arguably an important aspect in the tourism industry yet it is rated by the provinces a medium average of 88%.
 - ◇ Only 45% of the provinces rated training and development of staff as very important and thought that it should form part of a strategic tourism plan for a province.
 - ◇ The training of staff working with tourists was rated 82% (average). That is insufficient, because the staff need training to be able to give a quality service.
 - ◇ Tourism awareness campaigns are rated a medium average of 84%. The provinces rated this aspect as 33% - very important and 45% - important to be included in a province's strategic tourism plan.
 - ◇ According to Table 3.3 and Table 3.4 (chapter 3) the provinces do not rate staff training and development as a high priority.
 - **Finance / Funding (Table 4.8)**
 - ◇ Provinces rate the aspects dealing with funding and assistance with funding on provincial level as below average. The aspects and ratings are:
 - accessibility of finance for developers - 72% average,
 - provinces involvement in establishing new tourism businesses - 74% average, and
 - financing of tourism development / projects - 74% average.

- ◇ On the other hand, 67% of the provinces rate their involvement in accessing national and international funding as a very important part of a provincial strategic tourism plan.
 - ◇ The utilising of SMME's (small, medium and macro enterprises) for awareness campaigns and as part of a strategic tourism plan, has not been rated high (low average of 74%). This is the only aspect that did not get any rating on the number five weight (very important).
 - ◇ Table 4.8 does not confirm the previous point. The provinces have different opinions on the importance of financing of tourism developers from a provincial level.
 - ◇ In Table 3.3 and Table 3.4 only province A incorporated this element on a low level, whereas provinces B, C, D and E made it clear in their strategic plans that economic linkages and sourcing of finances are a high priority.
- **Existing competition (Table 4.9)**
 - ◇ The provinces did not rate the globalisation of tourism (low average - 76%) or the analysis of external environment (low to medium average - 80%) as very important, compared to other aspects.
 - ◇ 56 % of provinces rated the analysis of the external environment as very important; 11% of the provinces rated it as not important for a provincial strategic tourism plan.
 - ◇ The analysing of key success factors was rated a medium average of 86%. 45% of provinces rate this aspect as very important and 44% rated it as an important part of a provincial strategic tourism planning.
 - ◇ The analysis of existing competition (Figure 4.9) was rated by 67% of provinces as very important and essential for inclusion in a provincial strategic tourism plan. The provinces rated this aspect as 92% average (high).
 - ◇ According to Table 3.4 in chapter 3, province C excluded this element, provinces A and B included it at a low level and province D and E

incorporated this element as a high priority within the respective strategic plans.

- **Legislation, regulation and land tenure (Table 4.10)**

- ◇ Local authorities' building regulations received a low average of 60%, which is the lowest average of all aspects measured in this questionnaire.
- ◇ The nine provinces agree that policy papers (i.e. White Paper on Tourism) (average - 86%) should be incorporated in a provincial strategic tourism plan.
- ◇ The provinces rated the importance of land-use rights at an average of 72% and legislation, regulation and land tenure (use) at an average of 70%, which is low in comparison with the other aspects.
- ◇ Only 12% of provinces rated land-use rights, environmental impact analysis (EIA) and legislation, regulation and land tenure (use) as a very important part of a provincial strategic tourism plan.
- ◇ Other aspects that have been rated 72% and below average are: - women in tourism,
 - compatibility of existing legislation, regulation and land tenure (use), and
 - the effect of local legislation and regulations on international tourists visiting your province.
- ◇ According to Table 3.4 in chapter 3 a similar rating was given to this element. Province A and B did not include this element in their strategic plans. Province D incorporated legislation and regulations as a priority in their strategic plan, province C and E incorporated legislation and regulations in their strategic plan on a low level.

- **Public and private sector organisations (Table 4.11)**

- ◇ Aspects such as the involvement of the local community (average - 90%, see Figure 4.9) and the involvement of the local regional and provincial

tourism organisations / boards (average - 88%, see Table 4.11) were rated as a high priority for provincial strategic plans.

- ◇ On the other hand, the provinces rated local authorities (average 78%), regional tourism organisations (average 78%) and non-governmental organisations (average 74%) as a low priority to be included in their strategic plans.
- ◇ The provinces rated creation of more SMME's at 37% as important and 38% as very important parts of a provincial strategic tourism plan. According to Table 4.11 the provinces ratings are not consistent. The ratings for SMME's are low, yet tourism-related private proprietors and private companies are rated at an average of 88% that is a high rating.
- ◇ Another inconsistency is tourism structures at local, regional and provincial level. It is rated an average of 86%, although local authorities are rated an average of 78%.
- ◇ The National Parks Board was rated by 25% of the provinces as not important because not all the provinces have a provincial parks board in their provinces (Table 2.1, chapter 2).
- ◇ In chapter 3, Table 3.3 and Table 3.4, provinces B, C, D and E included this element in their strategic plans as part of a sub-heading (medium rating).

The following general conclusions can be made:

- ◇ According to Table 3.2 in chapter 3, the existing provincial strategic plans concentrated primarily on marketing. In chapter 4, results of questionnaire show that the majority of the nine highest ratings are marketing related. These aspects are, according to Table 4.12, as follows:

- promotion strategy : 96%
- quality of access routes : 92%
- purpose of the tourist's visit : 90%
- tourists' duration of stay at the destination : 90%

- availability of road signs : 92%
- mechanism for acquiring
tourism statistics : 92%

◇ Safety and security received one of the highest ratings at 96%.

5.3 RECOMMENDATIONS OF THIS STUDY

The recommendations of this study are a proposed strategic planning model for provincial tourism (Figure 5.1) and proposed further research.

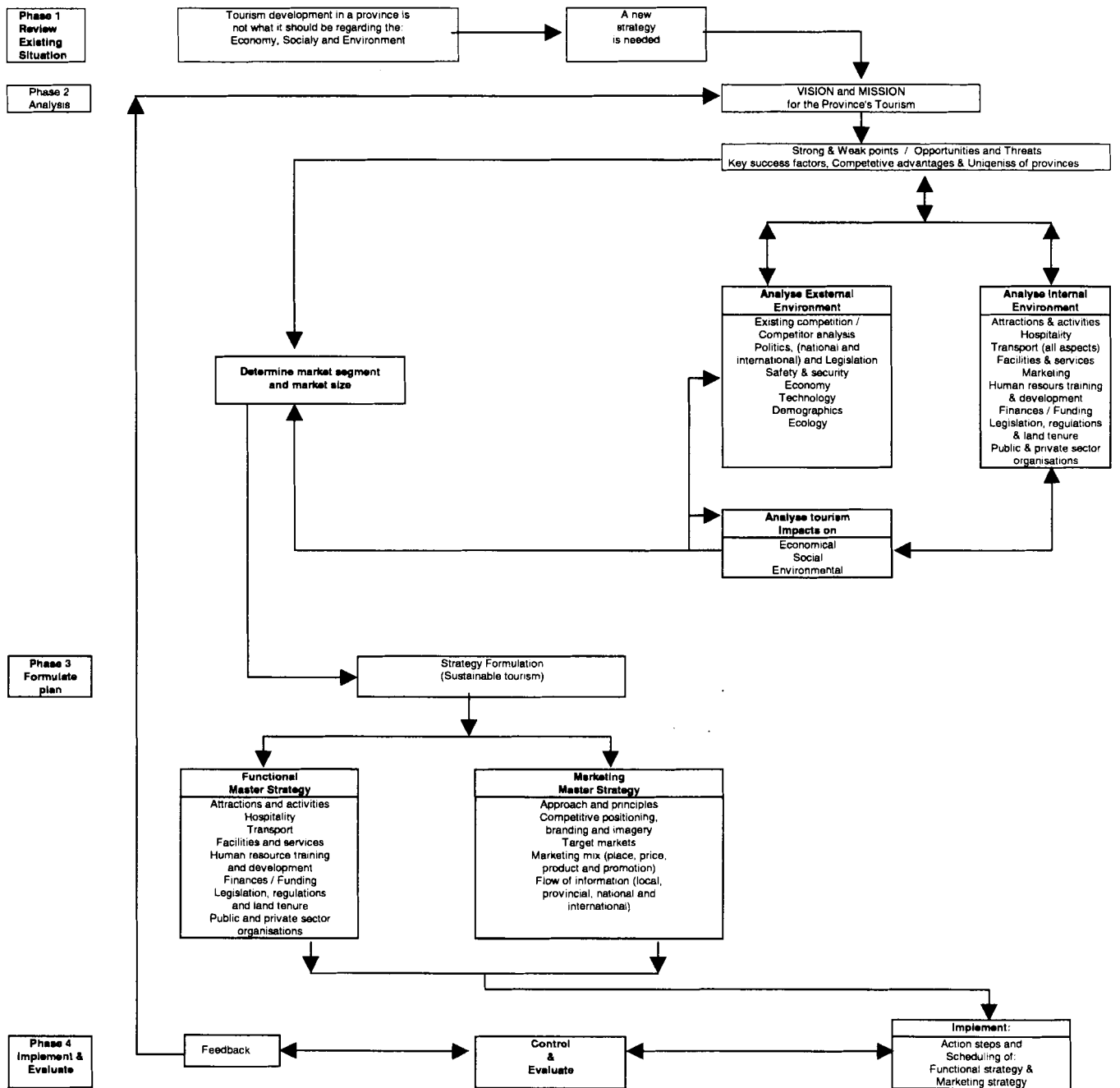


FIGURE 5.1: A strategic planning model for provincial tourism

5.3.1 PROPOSED STRATEGIC PLANNING MODEL FOR PROVINCIAL TOURISM

This model has been compiled with the following information at hand.

- A literature study as described in chapter 2, including tourism impacts, uniqueness of provinces, tourists' decision and key strategic elements in tourism.
- The basic order of a provincial strategic planning model, according to the existing provincial strategic plans (Table 3.2) and models that have been evaluated, is:
 - ◇ start with a vision
 - ◇ evaluate the internal and external environment
 - ◇ determine mission, goals and objectives
 - ◇ determine goals and objectives in the following categories
 - functional
 - marketing
 - financial
 - ◇ action plan
 - ◇ control methods
 - ◇ evaluate.
- Information gathered from evaluating the ten national key success factors according to the five provincial strategic plans (Table 3.3, chapter 3).
- Information gathered from evaluating provinces' tourism strategic plans against the eleven key strategic elements that are identified to be part of a province's tourism strategic plan (Table 3.4, chapter 3).
- Province E has measured up the best to Table 3.3, Table 3.4 in chapter 3 and the eleven key strategic elements in chapter 2. This province's existing strategic plan (model) will be incorporated into the proposed strategic planning model for provincial tourism (Figure 5.1).

- Results of the questionnaire as discussed in chapter 4.

The interpretation of the proposed strategic planning model for provincial tourism is illustrated in Figure 5.1 below.

The proposed provincial strategic planning model for tourism starts with **phase 1** by **reviewing the present situation** in the province's tourism industry. In this phase the province will have to decide if the outcome / performance of their existing strategic plan is of the standard that it was said to achieve. The province will have to decide if the tourism development meets the standard (if available) that was predicted economically, socially and environmentally. If the above questions are answered negatively, the province will have to go to phase 2 of the model.

Phase 2 is the analysis phase of the strategic planning model. Firstly a new **vision and mission** must be drawn up for the province's tourism industry. Then a **SWOT-analysis** is done of the province's tourism industry. Thereafter, an internal environmental analysis, external environmental analysis and tourism impact analysis will be done in order that the SWOT-analysis may identify the province's tourism **key success factors, competitive advantages** and determine **province's uniqueness**.

The **internal environmental analysis** will consist of the following elements:

- **Attractions and activities**

The following aspects will be measured:

- ◇ What type of climate does the province have?
- ◇ What is the purpose of the tourist's visit (business or recreation)?
- ◇ What type of attractions are available in the province?
- ◇ What type and quality of secondary service organisations (service stations, laundromats, food stores, emergency services and banking institutions) are available to tourists in the province?
- ◇ What type of tourism products are available in the province?
- ◇ What do a province's biomes consist of?
- ◇ Is the province a seasonal or all-year round attraction?

- **Hospitality**

The following aspects will be measured:

- ◇ What is the tourist's duration of stay at a tourist destination?
- ◇ What are the total number of beds available in a province in hotels, guesthouses, bed-and-breakfast facilities, motels and other overnight facilities?
- ◇ What types of catering facilities are available for tourists in the province (restaurants, tea gardens and coffee shops, franchise establishments)?
- ◇ What is the quality of service (grading) tourists can expect in the province from all tourism-related products?

- **Transport**

The following aspects will be measured:

- ◇ What is the quality of access routes (all modes of transport) to and from a province?
- ◇ What mode of transport is used by the tourists visiting the province?
- ◇ What is the general cost of transport mode (transport tickets or vehicle cost)?
- ◇ How available is transport for tourists to, from and in the province?
- ◇ How frequent is transport in the province?
- ◇ What is the travelling time / speed of transport most frequently used by tourists?
- ◇ How comfortable / luxurious is transport used by tourists?
- ◇ How available are road signs for tourists in the province?
- ◇ Are the road signs uniform in the province?

- **Facilities and services**

The following aspects will be measured:

- ◇ What is the purpose of the tourist's visit (business or recreation)?

- ◇ What type of secondary services organisations (gasoline service stations, laundromats, food stores, etc.) are available for tourists at the tourism facility?
- ◇ What type of tourism products are in the vicinity of the tourism facility?
- ◇ Are the province's facilities accessible to disabled people?

- **Marketing**

The following aspects will be measured:

- ◇ What type of climate does the province have?
- ◇ Where is the province located in South Africa?
- ◇ What type of biomes are in the province?
- ◇ Is the province a seasonal or all-year tourist attraction?
- ◇ What is the province's promotional and pricing strategies?
- ◇ Is the purpose of the tourist's visit business or recreation?
- ◇ What is the tourist's general duration of stay at a tourist destination in the province?
- ◇ What is the tourist's general expenditure during his / her stay in the province?
- ◇ Does the province make use of the latest IT (Information Technology) innovations pertaining to tourism?
- ◇ What mechanism for acquiring tourism statistics does the province use?

- **Human resource training and development**

The following aspects will be measured:

- ◇ What is the tourism staff's attitude towards tourists in the province?
- ◇ Does the province implement tourism awareness campaigns in the local communities?
- ◇ What standard of training for tourism staff members are available?

- ◇ What is the involvement in establishing new tourism business pertaining to training of entrepreneurs?

- **Finance / Funding**

The following aspects will be measured:

- ◇ What is the involvement of local communities in tourism development in the province?
- ◇ Does the province utilise SMME's when conducting awareness campaigns in the province?
- ◇ Does the province analyse local SMME's for possible tourism development or funding for emerging tourism entrepreneurs (including black empowerment)?
- ◇ Is finances available / accessible to tourism developers?
- ◇ Is the province involved in establishing new tourism businesses?
- ◇ Does the province finance tourism development / projects?
- ◇ What is the provincial government's involvement in accessing national and international funding for tourism development?

- **Legislation, regulations and land tenure**

The following aspects will be measured:

- ◇ Does the provinces take policy papers (i.e. White Paper on Tourism), transformation of the tourism industry (including women in tourism) into account and which of these are relevant to the provinces tourism?
- ◇ When provinces develop tourism facilities, do they take into account building regulations of local municipalities, Environmental Impact Analysis (EIA), legislation, regulations and land tenure (use)?
- ◇ How compatible are existing legislation, regulations and land tenure (use) with new tourism development in the province?
- ◇ Does the province take into account the effect of local legislation and regulations on international tourists visiting their province (i.e. customs,

import and export of items and taxes) and what does the province do to alleviate any inconvenience on the tourists' side?

- **Public and private sector tourism organisations**

The following aspects will be measured:

- ◇ What tourism structures at local, regional and provincial level are in place for tourism?
- ◇ How involved are the local communities in provincial tourism?
- ◇ How involved are the local, regional and provincial tourism organisations / boards in provincial tourism?
- ◇ Does the province create SMME's (small, medium and macro enterprises) for tourism in the province?
- ◇ Does the province utilise SMME's in awareness campaigns in a province on local level?
- ◇ How does the province involve the following government and semi-government departments (public sector) and the private sector in tourism development in the province?
 - National Department of Environmental Affairs and Tourism
 - SATOUR
 - National Parks Board
 - Provincial Tourism Departments
 - Provincial Tourism Authorities / Boards
 - Local Authorities
 - Non Governmental Organisations (NGO's, tourism related)
 - Tourism-related private proprietors and private companies (private sector).

The **external environmental analysis** will consist of the following elements;

- **Existing competition**

- ◇ How does the province analyse existing competitors?
- ◇ What is the effect of globalisation of tourism for the province?

- ◇ What are the province's key success factors and competitive advantages?
- ◇ Does the province analyse its external environment?
- **Politics (national and international) and Legislation (tourism related)**
 - ◇ What is the present political situation in South Africa and internationally?
 - ◇ What is the effect of the National White Paper on Tourism, National Tourism Acts and Constitution of the Republic of South Africa on the province's tourism industry?
 - ◇ What influence does the following have on the province's tourism industry?
 - Control environmental pollution
 - Labour laws
 - Salary and price control
 - Equal in-service training
 - Tax laws
 - Municipal by-laws
 - Ordinances.
- **Safety and security**
 - ◇ What safety measures are in place in the province pertaining to health-related issues, such as HIV / Aids, malaria and cholera, which may affect tourists visiting the province?
 - ◇ What safety and security measures are in place to ensure tourist's safety when visiting the province?
 - ◇ Where is the province located in South Africa in terms of safety statistics?
 - ◇ What tourism awareness campaigns do the province embark on in the local communities?
 - ◇ How do the province inform tourists of crime prevention measures that the local police are implementing and possible danger areas or situations which should be avoided during their stay?

- **Economy**

The following aspects have an effect on the province's tourism industry:

- ◇ Foreign exchange rates for South Africa
- ◇ World trade market indicators
- ◇ GDP of South Africa regarding tourism
- ◇ Fuel prices
- ◇ Inflation rate for South Africa.

- **Technology**

- ◇ Newest technological advances and innovations applicable to the tourism field:
 - E-mail
 - Internet: websites, marketing opportunities and banking facilities
 - Computerised booking facilities (network on national and international levels)
 - Transport modes
 - Adventure equipment.

- **Demographics**

- ◇ What is the tourist's place of origin?
- ◇ What is the age, gender, level of education and occupation (income level)?
- ◇ What is the tourist's culture?

- **Ecology**

- ◇ What type of climate, seasonality, fauna & flora do the province have?
- ◇ Does the province have natural attractions, for example nature reserves, plant life or animals (types)?
- ◇ Does the province rely on man-made attractions, casinos or theme parks?

The **tourism impact analysis** will consist of the following aspects:

This analysis will examine the impact of tourism on the local community / province.

- **Economical impact**

- ◇ Does the local community benefit economically from tourism development?
- ◇ Do the local tourism businesses buy services from the local or regional authority, or from private companies such as Eskom?
- ◇ Do the local tourism businesses buy operational items (such as groceries, maintenance items and cleaning items / equipment) locally?
- ◇ Do the local tourism businesses pay the relevant taxes to local, regional or provincial authorities?
- ◇ What is the effect of the following for the local economy:
 - Economic multiplier
 - Leakages
 - Contribution to government revenue
 - Job opportunities
 - Generation of income for regional development
 - Tourism activity such as length of stay, money spent at a destination and number of tourists visiting a destination / province.
- ◇ Is tourism development undertaken with equity in mind?
- ◇ Does tourism development ensure economic linkages with other sectors?

- **Social impact**

Did tourism development have an effect (positive or negative) on a local community, region or the province pertaining to the following:

- ◇ Was a declining community upgraded to a prosperous one?
- ◇ Did the moral conduct of the community change?
- ◇ In areas where gambling houses were developed, did it have an effect on the community?

- ◇ Did the increase of tourist visits and the development of tourism business increase the occurrence of health problems?
- ◇ Did the following change after tourism developed in an area / province:
 - Local language
 - Prostitution
 - Religion
 - Safety and security levels.

- **Environmental impact**

- ◇ Did any of the following change after tourism development took place in an area / province:
 - Water, air and visual pollution
 - Environmental hazards (for example ecological disturbances, improper waste disposal, overcrowding and congestion)
 - Land-use rights, as stipulated by local authorities by-laws
 - Historical and archaeological sites
 - Environmental quality (fauna and flora)
 - Tourism facilities and infrastructure.
- ◇ Did tourism developers do an environmental impact analysis (EIA) before development started?
- ◇ What type of biomes are available in the province to be developed for tourism?

The key success factors and competitive advantages are determined by taking the strong points of the province's tourism into consideration and using the opportunities available, as determined by the analysis of the external environment. At the same time the weak points and threats must be analysed and changed to strong points and opportunities, if possible, to the benefit of the province. After the SWOT-analysis and determining the key success factors, and after competitive advantages and the province's uniqueness have been identified, the market segment and market size are determined. The above are determined by taking the external environmental analysis into consideration and determining the province's position within the present tourism market.

Phase 3 is the **formulation phase**, where all the above information is used to formulate the province's strategic tourism plan.

After the province's position in the market has been determined, strategy formulation takes place. The process of **strategy formulation** is divided into functional strategy and marketing strategy. The **functional strategy** applies to:

- ◇ Attractions and activities
- ◇ Hospitality
- ◇ Transport (all aspects)
- ◇ Facilities and services
- ◇ Human resource training and development
- ◇ Finances / Funding:
 - Sources of finance in province
 - Budgeting: Personnel, Capital, Operational
 - Responsible and audited financial management of funds and grants in aid received
- ◇ Legislation, regulations and land tenure
- ◇ Public and private sector organisations.

The **marketing strategy** applies to:

- ◇ Approach and principles
- ◇ Competitive positioning, branding and imagery
- ◇ Target markets
- ◇ Marketing mix (place, product, price and promotion)
- ◇ Flow of information (local, provincial, national and international).

The above two strategies will be compiled as follows:

- ◇ Identify the key success factors and competitive advantages; then determine and evaluate alternative strategies within the functional and marketing fields.

- ◇ Develop a functional and marketing master strategy to be implemented.
- ◇ These two strategies have to be completed with sustainable tourism as the main focus: implement, control and evaluate.

Phase 4 is the **implementation and evaluation** phase. The **implementation** of the functional and marketing master strategies is done as follows:

- ◇ Action steps are derived for each of the above master strategies.
- ◇ Scheduling takes place.
- ◇ Responsibilities are delegated to specific sectors, departments or personnel.
- ◇ Budgets are drawn up and approved accordingly.

Control and evaluation methods are put into place, which include regular meetings to ascertain progress or stumbling blocks. Progress is noted, stumbling blocks eliminated or alternatives created.

Feedback is done in the process (model) to make changes to the **strategies** or **vision and mission** that will have an effect from that point down. This could have an effect on the outcome of the strategic plan.

This proposed strategic planning model for provincial tourism (Figure 5.1) is a dynamic process and information relevant to the specific province will be inserted; thus the outcome will be different for every province. The outcome can be positive or negative, depending on the effort that is put into the analysis and formulation phases of the above model.

5.3.2 PROPOSED TOPICS FOR FURTHER RESEARCH

Further research should be done on the following aspects, which were not covered in detail in this study:

- How can quality service be improved in a province's tourism industry?
- What practical actions can be implemented to protect tourists visiting provinces against criminal elements?

- In what ways can communication channels between national, provincial, regional, and local authorities / organisations be implemented to ensure maximum and prompt flow of tourism-related information and information about tourism organisations and authorities?
- How can financial assistance (any source) for tourism entrepreneurs be managed and fairly distributed in a transparent manner within the province's boundaries?
- What method can be implemented by the province to fund tourism developers who wish to invest in tourism development?
- What mechanisms can be put in place to improve the collection of statistical data from the province's tourism industry, in order to calculate detailed tourism-related statistics?
- How can provinces determine their market segment within the national and global tourism markets?
- What type of promotional material can be implemented to maximise the provinces domestic and global tourism marketing drive?

5.4 CONCLUSION

This chapter dealt with the conclusion of the study and the recommendations of this study.

The recommendations of this study were discussed under two sub-headings, namely proposed strategic planning model for provincial tourism and proposed topics for further research.

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ANNEXURE A

38 Andries Street
OBERHOLZER
2499
1 March 1999

Chief Executive Officer
Western Cape Tourism Board
Tyger Park No. 3
Willie van Schoor Avenue
BELVILLE
7530

Sir / Me

INFORMATION: PROVINCIAL STRATEGIC PLAN FOR TOURISM

I am a student at Potchefstroom University for Christian Higher Education, studying for a Ph.D in Tourism. The title of my thesis is "A Strategic Planning Model for Provincial Tourism".

My thesis starts by investigating the present tourism structures on national and provincial level. Then the nine province's existing strategic plans are studied and evaluated. A literature study is done on strategic planning models from other industries that will then culminate into a strategic planning model for tourism.

In the thesis the following question is asked: "Which strategic planning model may be suitable for the development of provincial tourism?" One of the objectives of the study is: "To compare and evaluate the nine provinces existing strategic plans for the development of tourism".

As you can see a large part of my thesis will cover existing tourism structures and strategic plans.

It will be appreciated if you could forward me the following information of your tourism structure / business.

1. Organogram of your province's tourism structure in relation to regional and local tourism organizations within the province (NGO's included).
2. Strategic plan / business plan / strategic marketing plan in regard to your provinces tourism.

3. Any comments you would like to make regarding the present state of national and provincial tourism with specific reference to strategic planning and development.

Your information and comments will form an important part of this thesis and will be handled with **strict confidentiality**. If you need clarity or more information, please contact the undersigned at tel. no. (018) 788 9641 / 2 (w), (018) 788 3233 (h) or fax no. (018) 787 4387.

Yours in Tourism,

T.J. CLOETE

(B.A., Honns., M.A.)

ANNEXURE B

38 Andries Street
OBERHOLZER
2499
13 July 2000

Sir / Madam

QUESTIONNAIRE: STRATEGIC PLANNING MODEL FOR PROVINCIAL TOURISM

I am writing a thesis to obtain a Ph.D at the Potchefstroom University for Christian Higher Education. The title of the thesis is, "A strategic planning model for Provincial Tourism."

It will be appreciated if you could fill in the attached questionnaire as complete as possible. In the event of you needing more information please feel free to contact myself, Tienie Cloete at Telephone number (018) 788 9641 (work) or Cell. number 083 236 6223.

The information received from you will ensure that a successful strategic planning model be developed that can be implemented for the benefit of South Africa's tourism industry.

Thank you for your time and effort to complete the attached questionnaire.

Yours faithfully

T.J. CLOETE
(B.A., Honns., M.A.)

ANNEXURE C

TOURISM QUESTIONNAIRE:

A STRATEGIC PLANNING MODEL FOR

PROVINCIAL TOURISM

This questionnaire has been developed to measure the weight / importance your province / department allocate to the elements in the planning of tourism. If your province / department did not include a specific element in your strategic planning / long-term plan / corporate plan please indicate in the comments space why that element is not applicable to your province / department.

The following elements have been identified from the White Paper on Tourism, Tourism in Gear, present strategic plans from provinces and various models from other industries, local and international tourism scientists to form part of the tourism industry.

Please read the question and make a cross next to the weight / number you would like allocate to the question.

WEIGHT	DESCRIPTION
1	No comment
2	Not important
3	Necessary
4	Important
5	Very important

If you have additional comments that you would like to make please write it in the comments space allocated at the end of the questionnaire. If the space allocated is insufficient please use a separate page for comments.

PLEASE REMEMBER THAT ALL INFORMATION IN THIS QUESTIONNAIRE WILL BE TREATED CONFIDENTIALLY. YOUR HONEST OPINIONS ARE IMPERATIVE FOR THIS STUDY TO DEVELOP A WORKABLE STRATEGIC PLANNING MODEL FOR PROVINCIAL TOURISM PLANNING.

1. How important do you rate the following for provincial tourism?

1.1 Climate	1	2	3	4	5
1.2 Tourism structures at local, regional and provincial level	1	2	3	4	5
1.3 Policy papers, i.e. White paper on Tourism	1	2	3	4	5
1.4 Health related issues, i.e. HIV / Aids, malaria, cholera	1	2	3	4	5
1.5 Safety and security	1	2	3	4	5
1.6 Local municipalities building regulations	1	2	3	4	5
1.7 Land use rights	1	2	3	4	5
1.8 Promotion strategy	1	2	3	4	5
1.9 Location of province	1	2	3	4	5
1.10 Purpose of the tourists visit (business or recreation)	1	2	3	4	5
1.11 Tourists duration of stay at a tourist destination	1	2	3	4	5
1.12 Tourists expenditure during his / her stay	1	2	3	4	5
1.13 Total number of beds available in a province	1	2	3	4	5
1.14 Types of catering facilities available in the province	1	2	3	4	5
1.15 Types of attractions available in a province	1	2	3	4	5
1.16 Quality of access routes (all modes of transport) to and from a province	1	2	3	4	5
1.17 Mode of transport used by the tourist	1	2	3	4	5
1.18 Cost of transport mode	1	2	3	4	5
1.19 Availability of transport mode	1	2	3	4	5
1.20 Frequency of transport mode	1	2	3	4	5
1.21 Travelling time / speed of transport mode	1	2	3	4	5
1.22 Comfort / luxury of transport mode	1	2	3	4	5

1.23 The involvement of the local community	1	2	3	4	5
1.24 The involvement of the local, regional and provincial tourism organisations / boards	1	2	3	4	5
1.25 Secondary service organisations (gasoline service stations, laundromats, food stores, etc.)	1	2	3	4	5
1.26 Quality of service	1	2	3	4	5
1.27 An Environmental Impact Analysis (E.I.A.)	1	2	3	4	5
1.28 Analysis of a provinces tourism products	1	2	3	4	5
1.29 Pricing strategies	1	2	3	4	5
1.30 Tourism staff attitude	1	2	3	4	5
1.31 Information Technology (IT)	1	2	3	4	5
1.32 Road signs – availability	1	2	3	4	5
1.33 Uniform road signs	1	2	3	4	5
1.34 Province's biomes	1	2	3	4	5
1.35 Seasonality	1	2	3	4	5
1.36 Tourism awareness campaigns	1	2	3	4	5
1.37 Training and development of staff members	1	2	3	4	5
1.38 Informing tourists of crime prevention measures that the local police are implementing and possible danger areas or situations which should be avoided during their stay	1	2	3	4	5
1.39 Creating more SMME's (Small, medium and macro enterprises)	1	2	3	4	5
1.40 Utilising SMME's (Small, medium and macro enterprises) when doing awareness campaigns in a province	1	2	3	4	5
1.41 Analysing local SMME's for possible tourism development or funding of emerging tourism entrepreneurs?	1	2	3	4	5
1.42 Mechanism for acquiring tourism statistics	1	2	3	4	5
1.43 Transformation of the tourism industry	1	2	3	4	5

1.44 Accessibility of finance for developers	1	2	3	4	5
1.45 Provinces involvement in establishing new tourism businesses	1	2	3	4	5
1.46 Financing of tourism development / projects	1	2	3	4	5
1.47 Provincial governments involvement in accessing national and international funding for tourism development?	1	2	3	4	5
1.48 Woman in tourism	1	2	3	4	5
1.49 Awareness and providing for disabled people	1	2	3	4	5
1.50 Analysing existing competitors for a province	1	2	3	4	5
1.51 Legislation, regulations and land tenure (use)	1	2	3	4	5
1.52 Compatibility of existing legislation, regulations and land tenure (use)?	1	2	3	4	5
1.53 The effect of local legislation and regulations on international tourists visiting your province (i.e. customs, import and export of items and taxes)	1	2	3	4	5
1.54 Globalisation of tourism	1	2	3	4	5
1.55 Analysing key success factors	1	2	3	4	5
1.56 Analysing the external environment	1	2	3	4	5
1.57 National Department of Environmental Affairs and Tourism	1	2	3	4	5
1.58 SATOUR	1	2	3	4	5
1.59 National Parks Board	1	2	3	4	5
1.60 Provincial Tourism Departments	1	2	3	4	5
1.61 Provincial Tourism Authorities / Boards	1	2	3	4	5
1.62 Regional Councils	1	2	3	4	5
1.63 Regional Tourism Organisations	1	2	3	4	5
1.64 Local Authorities	1	2	3	4	5
1.65 Non Governmental Organisations (tourism related)	1	2	3	4	5

1.66 Tourism related private proprietors and private companies.	1	2	3	4	5
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Comments: _____

Thank you for your time and effort by answering this questionnaire.

ANNEXURE D

Summarised questionnaire with results and averages as received from the nine provinces.

Questions	Province's weight allocation					Average
	1	2	3	4	5	
1.1 Climate			4	3	1	3,6
1.2 Tourism structures at local, regional and provincial level				3	5	4,3
1.3 Policy papers, i.e. White paper on Tourism			2	2	5	4,3
1.4 Health related issues, i.e. HIV / Aids, malaria, cholera			1	3	3	3,7
1.5 Safety and security				2	7	4,8
1.6 Local municipalities building regulations		3	4	1	1	3
1.7 Land use rights			4	3	1	3,6
1.8 Promotion strategy				2	7	4,8
1.9 Location of province			5	2	2	3,7
1.10 Purpose of the tourists visit (business or recreation)				4	4	4,5
1.11 Tourists duration of stay at a tourist destination			1	2	5	4,5
1.12 Tourists expenditure during his / her stay			2	1	5	4,4
1.13 Total number of beds available in a province	1		3	2	3	3,7
1.14 Types of catering facilities available in the province		1	1	4	3	4
1.15 Types of attractions available in a province			1	3	5	4,4
1.16 Quality of access routes (all modes of transport) to and from a province				3	5	4,6

1.17 Mode of transport used by the tourist		1	2	1	5	4,1
1.18 Cost of transport mode		1	4	3	1	3,4
1.19 Availability of transport mode		1	1	3	4	4,1
1.20 Frequency of transport mode			2	3	4	4,2
1.21 Travelling time / speed of transport mode		2	3	3		3,1
1.22 Comfort / luxury of transport mode		2		6		3,5
1.23 The involvement of the local community			1	2	5	4,5
1.24 The involvement of the local, regional and provincial tourism organisations / boards		1		2	5	4,4
1.25 Secondary service organisations (gasoline service stations, laundromats, food stores, etc.)		1	4	3		3,3
1.26 Quality of service			1	5	3	4,2
1.27 An Environmental Impact Analysis (E.I.A.)			2	5	1	3,9
1.28 Analysis of a provinces tourism products			2	2	5	4,3
1.29 Pricing strategies			3	4	1	3,8
1.30 Tourism staff attitude			1	3	4	4,4
1.31 Information Technology (IT)			1	4	4	4,3
1.32 Road signs – availability			1	2	6	4,6
1.33 Uniform road signs			2	1	5	4,4
1.34 Province's biomes			4	1	3	3,9
1.35 Seasonality			2	4	2	4
1.36 Tourism awareness campaigns			2	3	4	4,2
1.37 Training and development of staff members			3	2	4	4,1
1.38 Informing tourists of crime prevention measures that the local police are implementing and possible danger areas or situations which should be avoided during their stay		1	3	2	2	3,6

1.39 Creating more SMME's (Small, medium and macro enterprises)			2	3	3	4,1
1.40 Utilising SMME's (Small, medium and macro enterprises) when doing awareness campaigns in a province			3	6		3,7
1.41 Analysing local SMME's for possible tourism development or funding of emerging tourism entrepreneurs?			3	3	3	4
1.42 Mechanism for acquiring tourism statistics				4	5	4,6
1.43 Transformation of the tourism industry		1	1	2	5	4,2
1.44 Accessibility of finance for developers	1	1	1	2	3	3,6
1.45 Provinces involvement in establishing new tourism businesses	1		2	4	2	3,7
1.46 Financing of tourism development / projects	1		2	4	2	3,7
1.47 Provincial governments involvement in accessing national and international funding for tourism development?		2		1	6	4,2
1.48 Woman in tourism		1	4	2	2	3,6
1.49 Awareness and providing for disabled people			5	2	2	3,7
1.50 Analysing existing competitors for a province			1	2	6	4,6
1.51 Legislation, regulations and land tenure (use)		1	3	3	1	3,5
1.52 Compatibility of existing legislation, regulations and land tenure (use)?		2	2	3	2	3,6
1.53 The effect of local legislation and regulations on international tourists visiting your province (i.e. customs, import and export of items and taxes)	1	1	3	3	1	3,2
1.54 Globalisation of tourism			4	3	2	3,8
1.55 Analysing key success factors			1	4	4	4,3
1.56 Analysing the external environment	1		2	1	5	4

1.57 National Department of Environmental Affairs and Tourism	1		2	1	5	4
1.58 SATOUR			2	2	4	4,3
1.59 National Parks Board	1	1		4	2	3,6
1.60 Provincial Tourism Departments			1	5	3	4,2
1.61 Provincial Tourism Authorities / Boards				6	3	4,3
1.62 Regional Councils			2	5	2	4
1.63 Regional Tourism Organisations		1	2	3	3	3,9
1.64 Local Authorities			4	1	3	3,9
1.65 Non Governmental Organisations (tourism related)		2	1	4	2	3,7
1.66 Tourism related private proprietors and private companies.				5	4	4,4

ANNEXURE E



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